Tasks

Task Definitions

Tasks: Actionable requirements that have been assigned to company personnel.

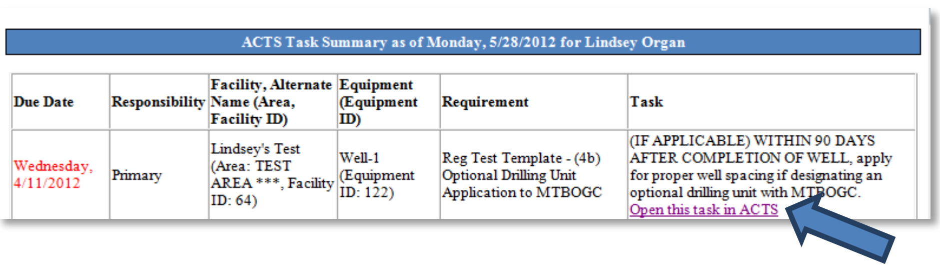
Task Description

Tasks are created during the nightly batch job process, which uses data from *Regulations* and several other ACTS records to determine task generation. The Task Window has various areas to help manage tasks.

Task Usage

Open the Task Window from Task Summary Email

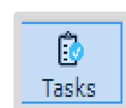
Select **Open this task in ACTS** from ACTS Task Summary Emails to navigate to the Task Window.



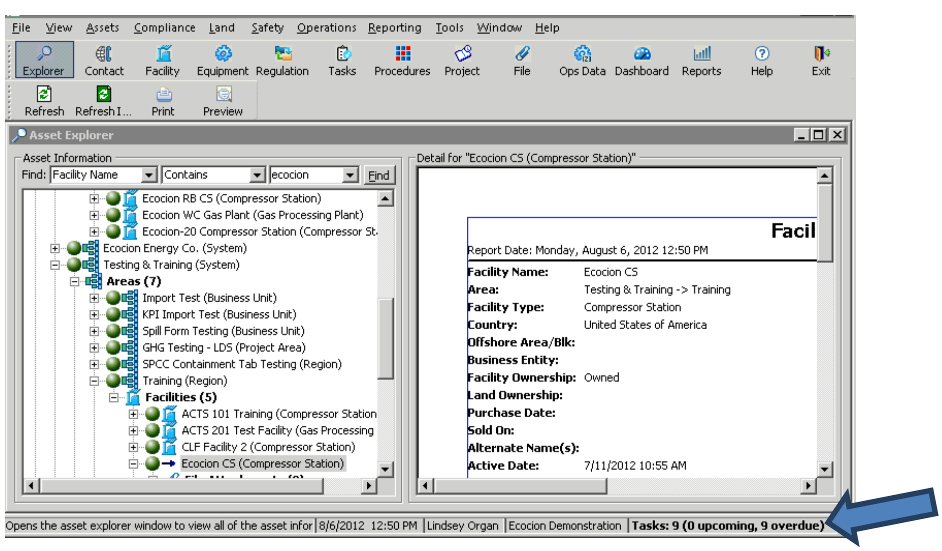
ACTS Task Summary as of Monday, 5/28/2012 for Lindsey Organ

Due Date	Responsibility	Facility, Alternate Name (Area, Facility ID)	Equipment (Equipment ID)	Requirement	Task
Wednesday, 4/11/2012	Primary	Lindsey's Test (Area: TEST AREA ***, Facility ID: 64)	Well-1 (Equipment ID: 122)	Reg Test Template - (4b) Optional Drilling Unit Application to MTBOGC	(IF APPLICABLE) WITHIN 90 DAYS AFTER COMPLETION OF WELL, apply for proper well spacing if designating an optional drilling unit with MTBOGC. Open this task in ACTS

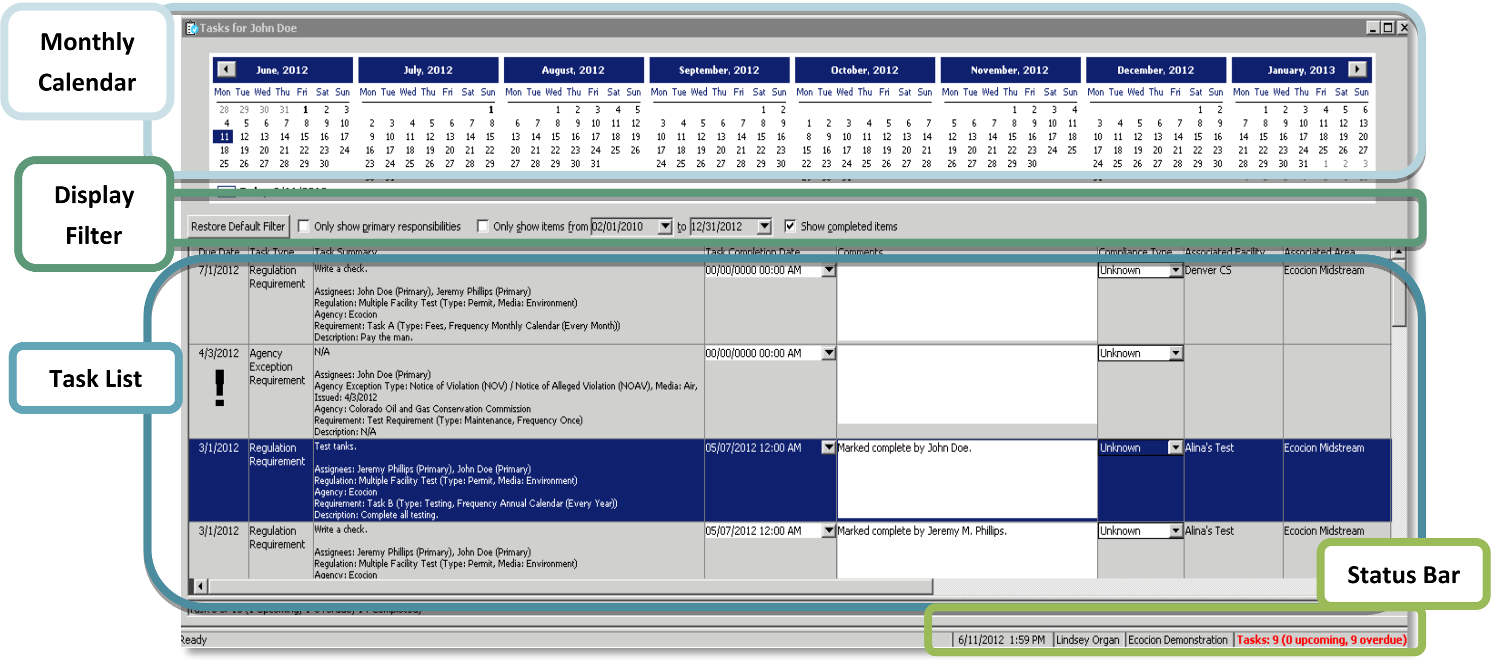
Open the Task Window from ACTS



Select the **Task** icon from the Toolbar,
Or select **Compliance →Tasks** from the Menu Bar,
` *Or* Double-click on the **Task Count** from the Status Bar to navigate to the Task Window.



Task Window



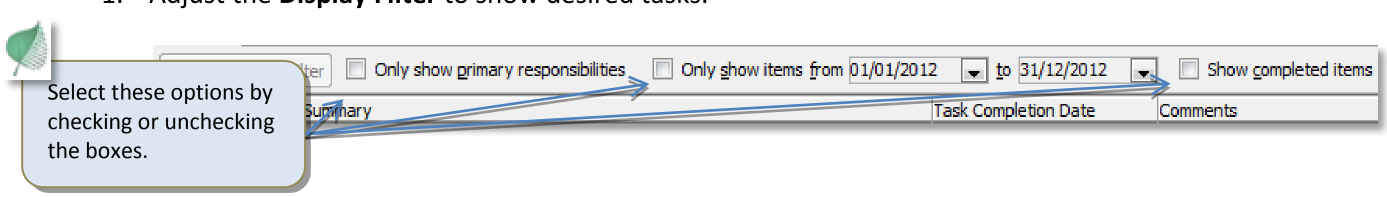
Task Home Screen Area Description

The table below describes the Task Window areas.

Area	Description
Monthly Calendar	Jump to a specific day in the task list by clicking on the date in the calendar. Days in the calendar that have tasks due are displayed in **bold**.
Display Filter	Change the tasks that are displayed by selecting these options, located above the task list and beneath the calendar.
Task List	The task lists displays all tasks assigned to a user. This is where task data may be changed.

Task Functionality

1. Adjust the **Display Filter** to show desired tasks.



- Only show primary responsibility: This displays only the tasks that the user has been assigned the primary task responsibility.
- Only show items from (with a date range option): This displays only tasks with Due Dates within a certain date range.
- Show completed items: This displays all completed tasks.

2. Review the tasks in the **Task List.**

Due Date	Task Type	Task Summary	Task Completion Date	Comments	Compliance Type
5/1/2012	Regulation Requirement	Write a check. Assignees: Jeremy Phillips (Primary), John Doe (Primary) Regulation: Multiple Facility Test (Type: Permit, Media: Environment) Agency: Ecocion Requirement: Task A (Type: Fees, Frequency Monthly Calendar (Every Month)) Description: Pay the man.	05/07/2012 12:00	Marked complete by John Doe.	In Compliance

- Due Date*:* Tasks are organized chronologically, starting with the first **Due Date**. If a task is overdue, a flashing exclamation point displays with the **Due Date**.
- Task Type: The **Task Type** specifies the kind of task.
- Task Summary: The **Task Summary** field shows a short summary of the task with assignees, regulation name, agency, requirement, description, etc.
- Task Completion Date: When a user marks a task as complete, described below, the **Task Completion Date** is populated. If the **Task Completion Date** is blank, the task has not been completed.
- Comments: Enter **Comments** in the text field. **Comments** are visible to any other user with the task on their task list. When a user marks a task as complete, described below, a default comment is generated that the task was marked complete by the user.
- Compliance Type: When a user marks a task as complete, described below, the selected **Compliance Type** is populated. The default **Compliance Type** is *Unknown*.

Associated Facility	Associated Area	Associated Equipment	Associated Regulation Requirement	Associated Agency Exception	Associated Project	Your Task Responsibility	Task Created On	Task ID
Denver CS	Ecocion Midstream		Multiple Facility Test: Task B			Primary	3/21/2012 9:22 AM	303

- Associated Facility, Associated Area, Associated Equipment, Associated Regulation Requirement, Associated Agency Exception, Associated Project: These fields show associations to other ACTS records.
- Your Task Responsibility: This shows the level of responsibility that the user has been assigned for a task. A user set to Primary will be the first to receive a notification. If this user completes the task, no one else will receive notifications. If not completed within a set period of time in relationship to the First Due Date, then the user set as Secondary will receive a notification, and so forth in accordance with the company escalation policy.
- Task Created On: This is the date that the task was first generated.

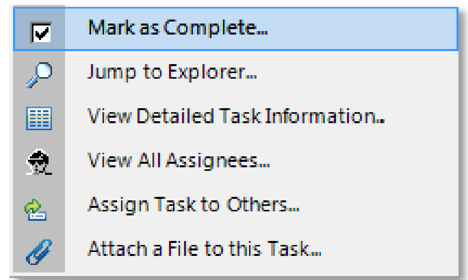
3. Right-click to use the **Context Menu** functionality described below.

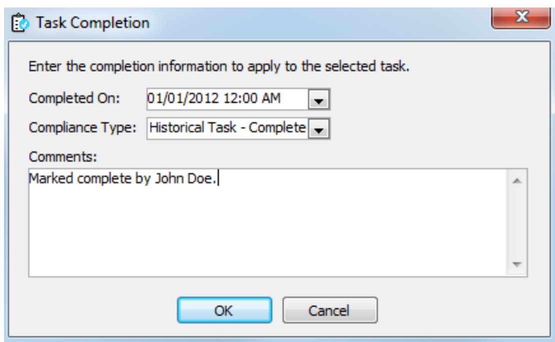
4. Save changes by pressing **(CTRL-S)** or select the **Save** icon from the toolbar.

Context Menu

Right-click on a task in the **Task Window** to access the **Context Menu** with the following options:

- **Mark as Complete:** Select this option to mark a task complete. Enter the **Completed On** date, the **Compliance Type,** and **comments** in the window. Select **OK**.





To mark multiple tasks as complete: multi-select tasks by pressing and holding **CTRL** and selecting the tasks.

- **Jump to Explorer:** Select this option to open the Asset Explorer to the Asset associated to the selected task. Drill-down to the file attachment to view the associated document.

- **View Detailed Task Information:** Select this option to open a window with detailed information about the selected task in a different format.

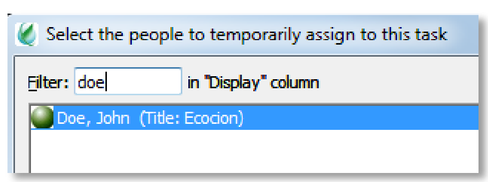
- **View All Assignees:** Select this option to open a window displaying all assignees for the selected task.

- **Assign Task to Others:** Select this option to assign the selected task to another user. When the window opens, select a user to change task assignment. Select **OK**.

Assigning a task to another user **does not** change the assignee for all reoccurring tasks.

Assigning a task to another user **does not** remove the task responsibility from the original assignee.

To assign multiple tasks to another person: multi-select tasks by pressing and holding **CTRL** and selecting the tasks.

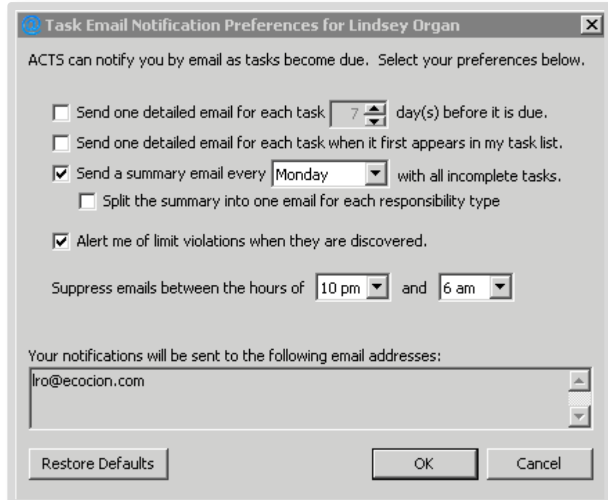


- **Attach a File to this Task:** For each task, the user may attach pertinent files.

Email Preferences

Personalize Task Email Notification Preferences

1. Select the **Email Prf** icon from the ACTS toolbar.
2. Chose various email options by checking and unchecking boxes and selecting from the drop-downs.
3. Select **OK**.
4. Save changes by pressing **(CTRL-S)** or select the **Save** icon from the toolbar.

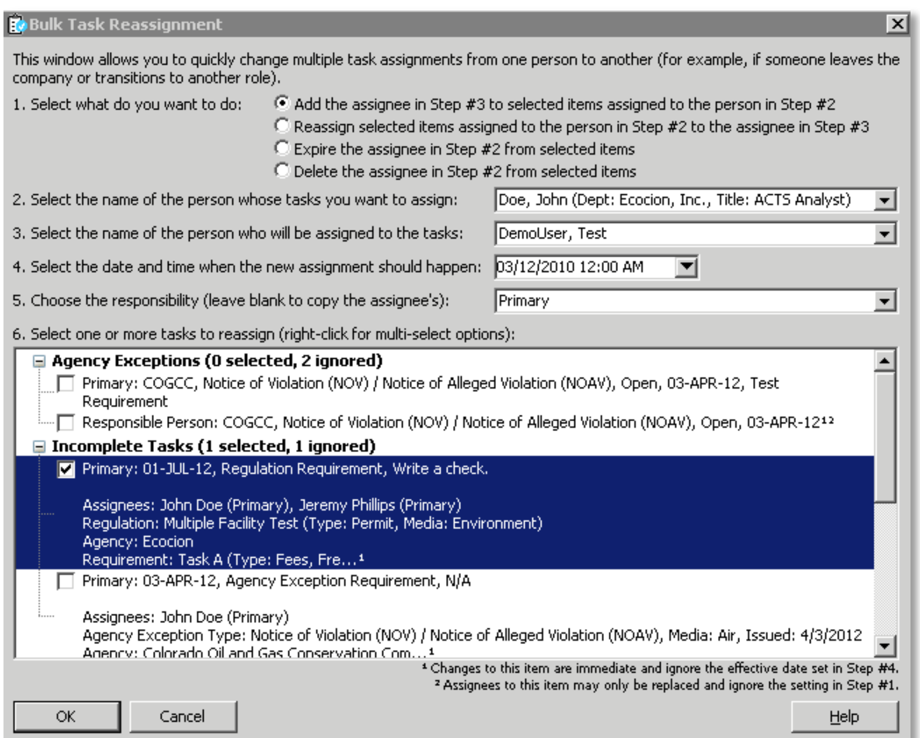


Task Administrative Notes

Bulk Task Re-assignment

Administrative users may change multiple task assignments from one user to another through the **Bulk Task Re-assignment Window** (for example, if a person leaves the company or transitions to another role).

1. Select **Tools → Utilities → Bulk Task Re-assignment** to open the window.
2. Follow the steps in the re-assignment window.
3. Select **OK.**



Delete Incomplete Tasks

Administrative users may delete multiple task assignments at one time.

1. Select **Tools → Utilities → Delete Incomplete Tasks** to open the window.
2. Check the checkboxes under the Delete column of the tasks to be deleted.
3. Select **OK**.