

Workflows: Tasks



1. Create
2. Task Notification
3. Progress

Tasks: Create

Why?

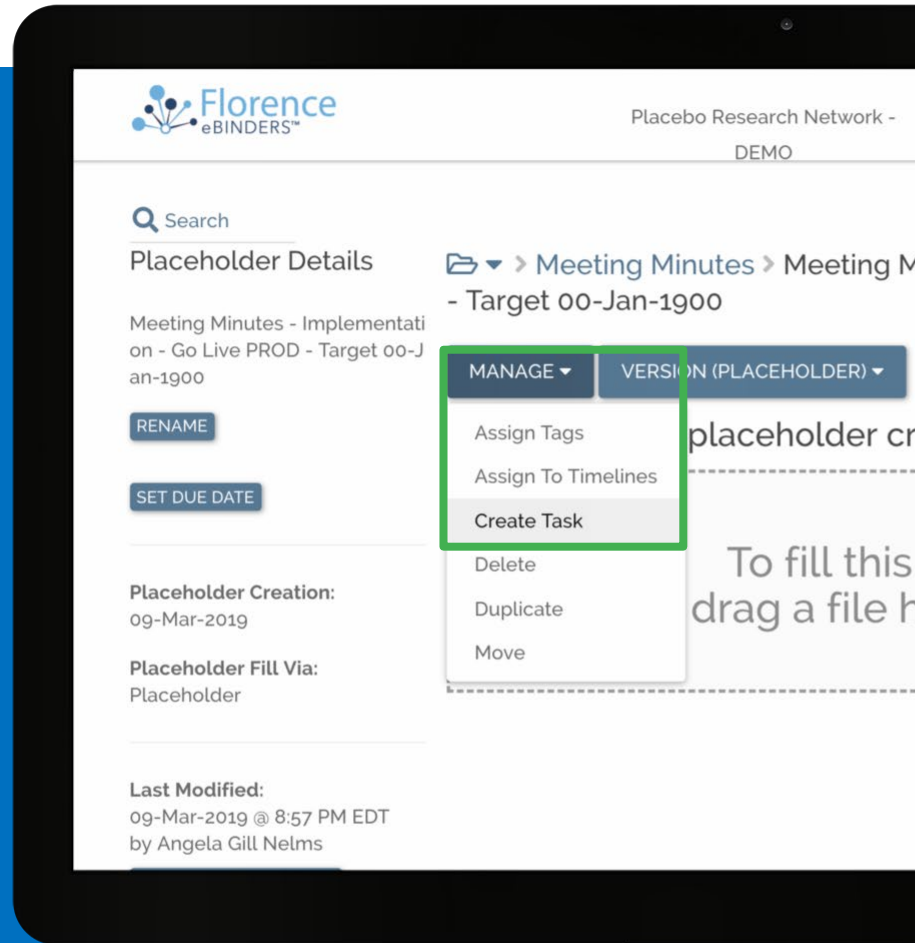
Provide instructions to Users to complete Documents or Fill Placeholders

How?

1. Open Document
2. Click "Manage"
3. Click "Create Task"
4. Provide a Task Title, Message, and assign a User
5. Select "SAVE"

Common Uses

- Request Documents to fill Placeholders
- Request completion of Documents (Logs, FDF, AEs, etc.)



Create Task for Placeholder Meeting Minutes - I...

... / Meeting Minutes - Implementation - Go Live PROD - Target 00-Jan-1900

*** Task Title**

*** Message**

Notify Me When Complete

Notify Me When Closed

Assign To:

Filter by...

AlbertoQA1 Test1	ASSIGN
Angela Gill Nelms	CANCEL
Angela Investigator	ASSIGN
Angela SAML Nelms	ASSIGN

CANCEL SAVE

Tasks: To Do, In Progress, Complete, & Close

Update Task **Upload Go Live Prod Meeting Minu...**

••• / Meeting Minutes - Implementation - Go Live PROD - Target 00-Jan-1900

Status

* Task Title

Upload Go Live Prod Meeting Minutes


Message

Please upload the Meeting Minutes from the Go Live Prep Meeting. When uploaded please move task to "COMPLETE" so that it will notify me. Thanks!

* Comment

Document Uploaded. Thanks!

Notify Me When Complete
 Notify Me When Closed

 Florence

There Was A Change in Task Status

Hi Angela Gill,

We wanted to let you know that Angela SAML Nelms has set a task to **Complete**. See details below and click on the button to review the task.

Task: [Upload Go Live Prod Meeting Minutes](#)

Requested By: Angela Gill on 26-May-2019 @ 11:14 PM EDT

Team: [Placebo Research Network - DEMO](#)




Binder: [Awesomeness Clinical Research - Implementation, ePrinter, SSO, Custom Work, Doc Migration, and CTMS - DEMO](#)




Folder: [CTMS Name - Implementation](#)




Document: [Template/Implementation - Go Live PROD - Target 00-Jan-1900/Meeting Minutes](#)




Message: [Meeting Minutes - Implementation - Go Live PROD - Target 00-Jan-1900](#)

Please upload the Meeting Minutes from the Go Live Prep Meeting. When uploaded please move task to "COMPLETE" so that it will notify me. Thanks!

Type	Name	Count	Last Modified
<input type="checkbox"/>	 2016 Q4 Payment - Site 001 - Activation   Task: New Task April, Status: To-Do		27-May-2019 @ 1:26 AM EDT

Type	Name	Count	Last Modified
<input type="checkbox"/>	 2016 Q4 Payment - Site 001 - Activation   Task: New Task April, Status: In Progress		27-May-2019 @ 1:26 AM EDT

Type	Name	Count	Last Modified
<input type="checkbox"/>	 2016 Q4 Payment - Site 001 - Activation   Task: New Task April, Status: Complete		27-May-2019 @ 1:25 AM EDT

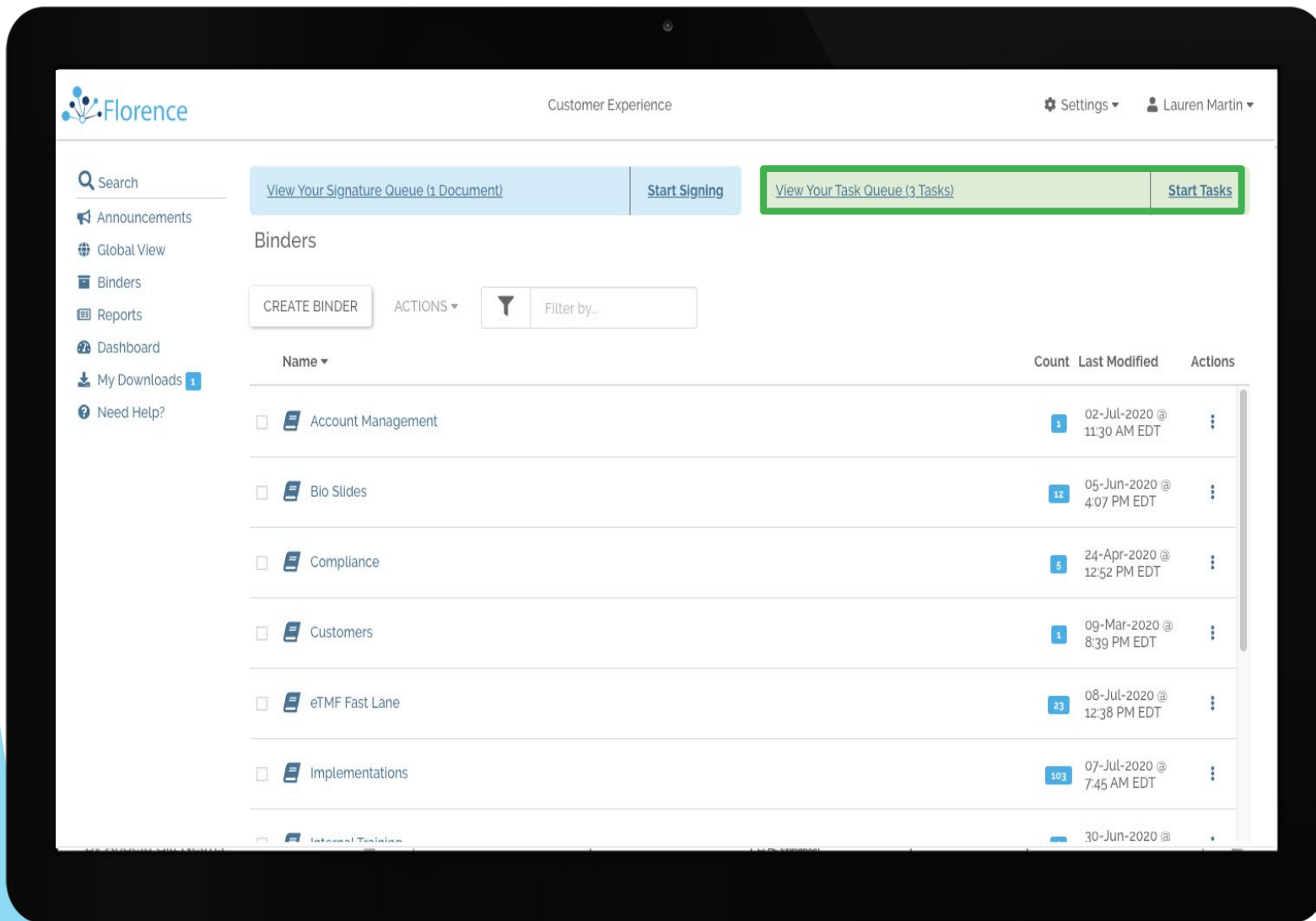
Type	Name	Count	Last Modified
<input type="checkbox"/>	 2016 Q4 Payment - Site 001 - Activation  		27-May-2019 @ 1:29 AM EDT

Receive email notifications when Tasks move from "ToDo/In Progress" to "Complete" or "Closed"

"Complete" Tasks remain as "Pending"

"Closed" Tasks are no longer pending and locked at location (cannot be deleted)

Find your tasks: Binder – Green Bar



Log into Florence

If GREEN BAR is visible, click "Start Tasks"

Tasks: Emails, Reports, Global View & Notifications



1

You have been assigned a Task

Hi Angela Gill Nelms,
 Angela Gill Nelms assigned you Task **Upload Go Live Prod Meeting Minutes** for Document **Meeting Minutes - Implementation - Go Live PROD - Target 00-Jan-1900**.

Task: Upload Go Live Prod Meeting Minutes
Requested By: Angela Gill Nelms on 26-May-2019 @ 11:14 PM EDT
Team: Placebo Research Network - DEMO
 Awesomeness Clinical Research - Implementation, ePrinter, SSO, Custom Work, Doc Migration, and CTMS - DEMO
Binder: CTMS Name - Implementation
Folder: Template/Implementation - Go Live PROD - Target 00-Jan-1900/Meeting Minutes
Document: Meeting Minutes - Implementation - Go Live PROD - Target 00-Jan-1900
Message: Please upload the Meeting Minutes from the Go Live Prep Meeting. When uploaded please move task to "COMPLETE" so that it will notify me. Thanks!

[Complete Task](#)

Reports

2

Tasks - My Queue

Awesomeness Clinical Research - Implementation, ePrinter, SSO, Custom Work, Doc Migration, and CTMS - DEMO, and 10 other(s)

meeting

Name	Location	Created By	Status	Last Modified
Upload Go Live Prod Meeting Minutes	Awesomeness Clinical Re...	Angela Gill Nelms - angela.nelms@flor encehc.com	To-Do	26-May-2019 @ 11:14 PM EDT

Global View > Awesomeness Clinical Research - Implementation, ePrinter, SSO, Custom Work, Doc Migration, and CTMS - DEMO

3

Choose Binder or Folder

1 DOCUMENTS 334 PLACEHOLDERS 1 PENDING TASK

Awesomeness Clinical Research - Implementation, ePrinter, SSO, Custom Work, Doc Migration, and CTMS - DEMO

- CTMS Name - Implementation Template
- Implementation - Go Live PROD - Target 00-Jan-1900
 - Meeting Minutes
- Meeting Minutes - Implementation - Go Live PROD - Target 00-Jan-1900

Task: Upload Go Live Prod Meeting Minutes,
Status: To-Do

Manage My Notifications

4

Filter by...

Name	Conditions	Frequency	Delivery Schedule
Due in 2 Days	If one or more	Daily	Daily each morning only if placeholders are due
Due in 14 Days	If one or more	Weekly	Every Monday morning only if placeholders are due
Due in 30 Days	Never		
Due in 60 Days	Never		
Expiring in 2 Days	If one or more	Daily	Daily each morning only if documents are expiring
Expiring in 14 Days	If one or more	Weekly	Every Monday morning only if documents are expiring
Expiring in 30 Days	Never		
Expiring in 60 Days	Never		
Signatures - My Queue	If one or more	Weekly	Every Monday morning only if signatures are in my queue
Tasks - My Queue	If one or more	Weekly	Every Monday morning only if tasks are in my queue

Stay on top of your outstanding Tasks via:

1. Email requests
2. Task Reports
3. Global View
4. Email Digests via "Manage My Notifications"

