

## OPERATE - TASKS

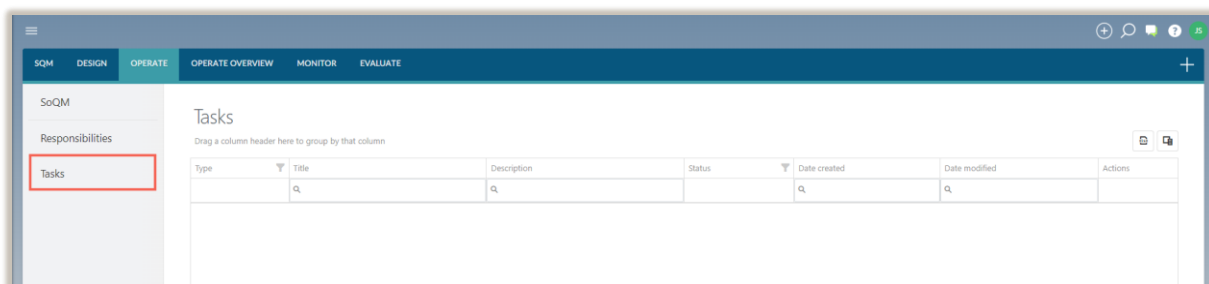
The following describes the functionality and features included in SQM.

### Objective

The objective of this page in SQM is to provide an individual user with an overview of tasks that the individual user has completed or the scheduled tasks which must still be completed.

### Page position

TASKS can be found in the OPERATE module.



### Page content

This page includes a table that contains the following types of tasks for the individual user:

- Automatic tasks, either completed or still to be completed by the user; and
- Manually created tasks completed by the user.

Note that individual users can only see their own tasks; they cannot see the tasks of any other users.

#### 1. Automatic tasks

When the completion of tasks have been scheduled with specific frequency in the DESIGN module, these tasks will automatically be created on the user's OPERATE TASKS page at the set dates and intervals. Note that the frequency of the task is set when designing the linked PROCEDURE RESPONSE, while the content of the form to be completed, is set when designing the TASK itself.

Automatic tasks will only be scheduled once the relevant procedure responses and their linked tasks have been approved and published to OPERATE SoQM.

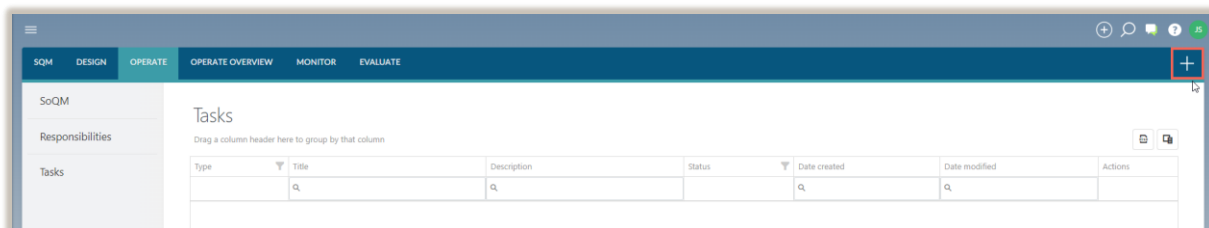
#### 2. Manually create a task

Manual tasks are those tasks that have been assigned to a user, but which cannot be scheduled at a specific frequency.

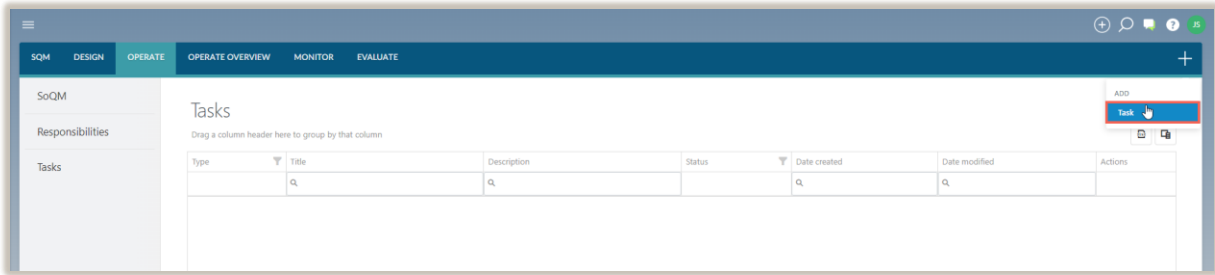
Users create manual tasks when required by the relevant circumstances.

The user creates a new manual task by using the 'add a new item' feature.

To create a new instance of a task, click the QUICK CREATE button.



Select TASK to create a new manual task.

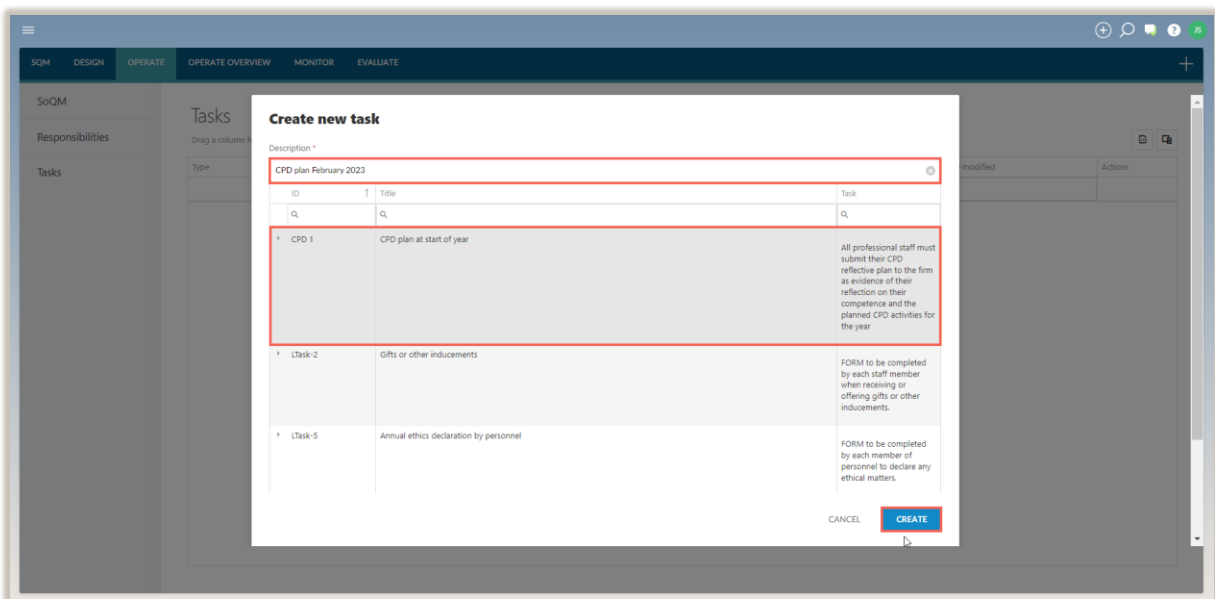


A dialog with all the available tasks, allocated to the user, will be activated.

Add a description to differentiate this task from other similar tasks.

Select the specific task to be created.

Click CREATE



The new task is created in SQM and it is listed in the table of tasks.



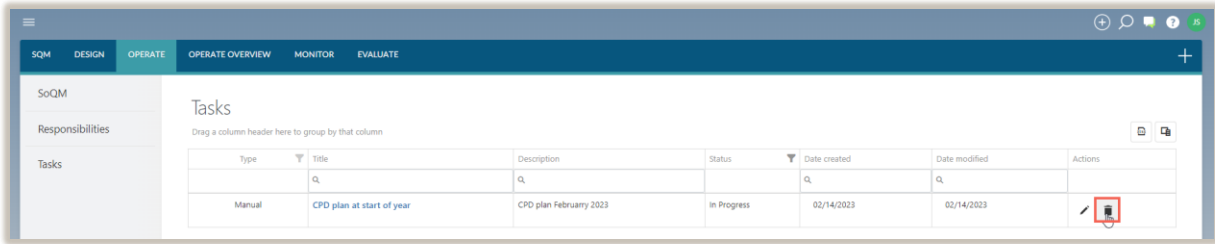
While adding the newly created task in SQM, a new tab opens in the web browser and reflects a form that the user must complete and submit before the task can be finalised.

### 3. Delete a manual task

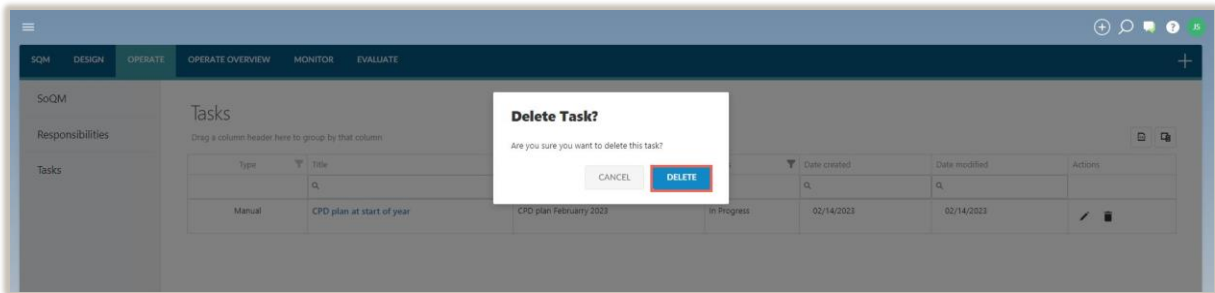
Manually created tasks can be deleted while their status reflects as 'In Progress'.

If a task has already been submitted, the task cannot be deleted.

To delete the task, navigate to the task table and click the delete button.



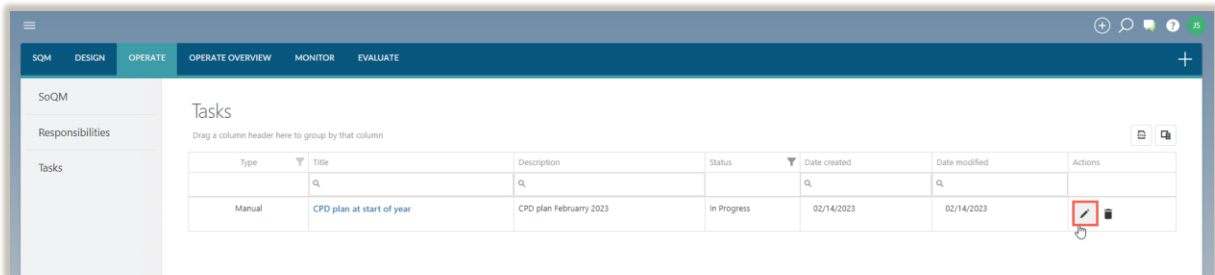
A dialog will confirm that the task can be deleted. Select DELETE.



#### 4. Edit a task

Tasks can be edited while their status reflect as 'In Progress'.  
If a task has already been submitted, the task cannot be edited.

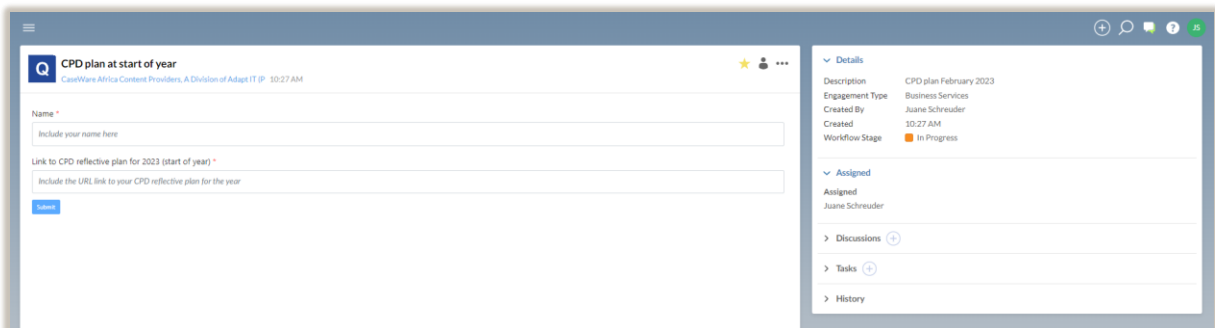
To edit a task, navigate to the task table and click the edit button.



The task form will open in a new browser and can be completed and submitted.

#### COMPLETING A TASK FORM

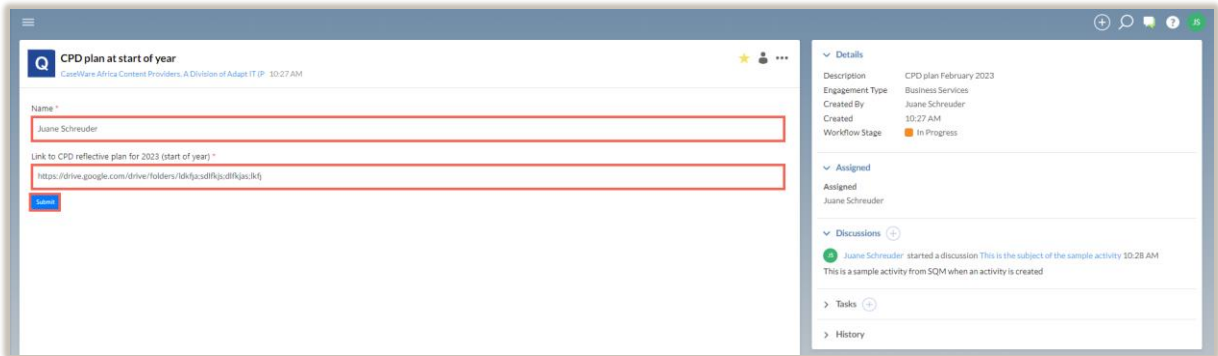
The new tab reflects a form that the user must complete and submit before the task can be finalised.  
For example, the task to upload the user's CPD reflective plan is reflected on the form.



Fields indicated with a red asterisk (\*) indicate fields that must be completed before the form can be submitted.



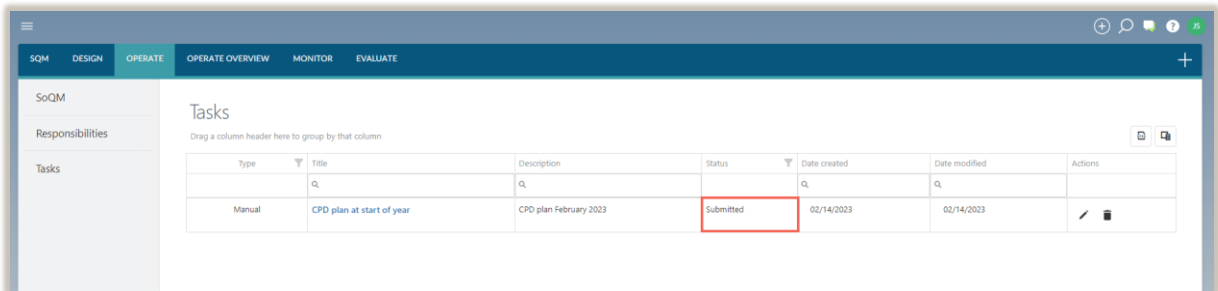
Complete the required fields and click SUBMIT to complete the task.



The status of the form changes to 'submitted' and the tab can be closed.



In closing the tab, the SQM now shows the status as 'submitted'.



## Page Outcomes

Users will use this page in SQM to record their manually created tasks and to complete their automatically scheduled tasks.

All outstanding tasks should be completed and submitted in this page.

## Features

The following features are available on this page:

- Working with tables, which includes filter, sort, group, column chooser, expand, see page XXX;
- Export all data, see page XXX; and
- Add a new item, see page XXX.