PROJECT SHEETS – Sheets where new tasks will be entered and listed for the project

Fields:

1. Task ID – Unique ID assigned to the task based on the project, the month, the year, and a count for that month
   Ex: S415-003
   S = SIBS, 4 = April, 15 = 2015, 003 = the third task for this project that month
   a. At a glance the ID can show you how many tasks have been assigned that month
2. Timestamp for when the task was entered
3. Timestamp for when the task was completed (auto-populates when task status changed to "complete")
4. The project label
5. The task
   a. This is meant to be a summary of the task, but not a replacement for communication around the details
6. A start date for the task
7. A due date for the task
8. An estimation of how many hours you expect the task to be worked on per week. (Min hpw)
9. And estimation of the total hours you expect the task to take. (ETH)
10. Who assigned the task
11. Who the task is assigned to
12. The priority level of the task – High, Medium, Low
    a. The priority level will automatically turn to "Late" when the current date exceeds the due date. The due date can be changed at any time to re-label the priority and remove the "Late" label
13. The total amount of time the task took compared to the "ETH" as reported by the staff member/graduate student the task was assigned to.
14. The status of the task
    Statuses are:
    a. Assigned – the task is "assigned" when it is first created
    b. Received – the staff member will update the status to "received" to indicate that they are aware of the task being assigned to them (this lets the PI know that they know about it)
       i. The staff member does not need to have communicated with the PI about the task before updating to "received". The staff member should follow up about the task once they have seen (or been notified of) the new assigned task
    c. In progress – the staff member will update the status to "In progress" once they have begun to work on the task
    d. Ongoing – A task can be assigned as "ongoing" if the staff member is expected to dedicate a specific amount of time to a task every week until the due date. It is assumed to be in progress and will only need to be updated by the staff member when complete.
    e. Pending Review - The staff member is waiting on a review of their work on the task from the assigner. They are not actively working on the task while it is pending review.
    f. "Complete" – The staff member will update the status to "complete" when they have completed the task , and a timestamp of completion will be posted at that time

TOOLS:

- The 'Staff Member Tasks" sheet displays any non-completed tasks assigned to staff members at any given moment (can be filtered by fields, but not sorted)
  - Staff members will be using this sheet to view their tasks and to update the status of the task beyond "assigned". The update of this status will then reflect on that project's sheet
  - The PIs can use this sheet to view the current workload of each staff member, and use it determine who they want to assign a task to.

- The “Tasks Distribution Sheet” has charts and graphs displaying numbers at a glance for distribution of tasks among staff members. All numbers are for tasks that are not completed. Included are total tasks, including numbers by priority level and by statuses. There is total tasks within a date range, a chart displaying the hours a staff member has scheduled for a certain week, and the total number of work hours a staff member has within a date range.
- The ‘due date filter’ is a tool to be able to view tasks that are due within a certain range. This can be used to help determine what due date to apply to a task, based on the workload for a certain time period. (sheet can by filtered by fields, but not sorted)
- The ‘master’ sheet contains all tasks from all projects and with all statuses. This sheet can be sorted and filtered by any field.
- The ‘completed tasks’ sheet keeps a log of all tasks that have been completed.
    - The completed tasks log can be used to analyze productivity levels and gauge how many tasks circulate based on time periods, projects, etc.

NOTE: *The sheets and individual fields will be protected from edits depending on the person so that everyone can only change what they need to.*

NOTIFICATION E-MAILS:

- The PIs will receive an e-mail every evening with any current tasks that are late and assigned by the receiving PI.
    - This can be used to change the details of the task accordingly, and change the “status” of the task if appropriate so that it is not on record as “Late” in the archives.
- The PIs will receive an e-mail every evening with tasks that have been completed that day.
- Staff members will receive an e-mail every morning with all current non-completed tasks assigned to them (assigned, received, ongoing, and in progress)
- Staff members will receive an e-mail notification every time they are assigned a new task.