

Task Overview – Outline

2/2/25

- 1) The **My tasks** window is a general overview of all outstanding tasks across all open projects assigned to you. Each task assigned to you will be included in this window and organized into **Sections** based on which stage of the workflow the project is currently in:
 - a. **Pending Event Schedules:** the leading task “Confirm event dates & schedule” has not yet been completed; we’re waiting for the client to choose a specific date or schedule from a set of options. The EMS status for events in this section should be PND Date Selection
 - b. **Ready & Ongoing Events:** events in this section are either ready to go or in progress
 - c. **Post-Event:** events in this section have been completed and are currently in the post-event billing process
 - d. **Recently assigned:** a general list of open tasks across all projects
- 2) To hide completed tasks from your list, click the **Filter** button above the task list, and select **Incomplete tasks**. You can save this view by clicking the **Save view** button to the right.
- 3) To prioritize the tasks that have due dates assigned to them, click the **Sort** button above the task list and choose **Due date**. This will make sure that tasks with due dates are always placed at the top of the list. You can save this view by clicking the **Save view** button to the right.