

Create a Task

1

Open the appropriate proposal you want to create a task for.

The screenshot displays the 'eProjects' web application interface. At the top, a navigation bar includes links for 'eProjects', 'Projects', 'Awards', 'Subawards', 'Reporting', and 'More'. Below this, a breadcrumb trail shows 'eProjects / Example 11.3.25 Recording / 26-0099-P0001'. The main heading is 'Example 11.3.25 Recording'. A 'Proposal Summary' section is visible, featuring a 'Complete Review' button and a 'Route for Review' button. The summary includes fields for 'PI: --', 'Sponsor: --', 'Project Start Date: --', 'Admin Unit: --', 'Prime Sponsor: --', 'Project End Date: --', 'Sponsor Deadline: --', 'Instrument Type: --', and 'Total Sponsor Costs: --'. A 'Project: 26-0099' link is also present. Below the summary, a horizontal menu contains 'Proposal Form', 'Routing', 'History', 'Access', 'Tasks', 'Notes', 'Attachments', 'Links', and 'Admin Only'. A note on the right states 'All changes save automatically'. The 'General Information' section is expanded, showing a list of sections on the left: 'General Information' (checked), 'Personnel' (checked), 'Regulatory Compliance' (checked), 'Port Control' (checked), 'Design Support & Collaboration' (checked), and 'Information Sharing' (checked). The 'Sponsor Information' section is active, containing fields for 'Sponsor:' (with a search icon), 'Prime Sponsor (if applicable):' (with a search icon), 'Direct source of funds', 'Originating source of funds (if different than sponsor organization)', and 'If Sponsor is not listed, please specify:'.

2 Click "Tasks"

Proposals Projects Awards Subawards Reporting More

MVActive Projects / Example 11.3.25 Recording / 26-0099-P0001

Example 11.3.25 Recording

My Actions
Complete Review
Route for Review

Proposal Summary
PI: -- Sponsor: -- Project Start Date: --
Admin Unit: -- Prime Sponsor: -- Project End Date: --
Sponsor Deadline: -- Instrument Type: --
Total Sponsor Costs: --

In Development

Proposal Form Routing History Access **Tasks** Notes Attachments Links Admin Only

All changes saved

Proposal Sections
General Information ✓
Key Personnel ✓
Regulatory Compliance ✓
Export Control ✓
Foreign Support & Collaboration ✓
Information Sharing ✓

General Information
Sponsor Information
Sponsor: Prime Sponsor (if applicable):
Direct source of funds: Originating source of funds (if different than sponsor organization):
If Sponsor is not listed, please specify: If Prime Sponsor is not listed, please specify:
Sponsor's Turn:

3 Click "Create New"

Example 11.3.25 Recording

Route for Review
Route for Review

Proposal Summary
PI: -- Sponsor: -- Project Start Date: --
Admin Unit: -- Prime Sponsor: -- Project End Date: --
Sponsor Deadline: -- Instrument Type: --
Total Sponsor Costs: --

In Development

Routing History Access **Tasks** Notes Attachments Links Admin Only

+ Link to Milestone

Create New

Set View

ID	Title	Type	Milestone ID	Category	Progress	Assigned to	Internal Due Date	External Due Date	Status
No results to display.									

My Tasks

4 Click "Task"

11.3.25 Recording

Proposal Summary In Development

Project: 26-0099

Routing History Access **Tasks** Notes Attachments Links Admin Only

+ Link to Milestone **Create New** Set View

Task Milestone

ID	Title	Type	Milestone ID	Category	Progress	Assigned to	Internal Due Date	Status
No results to display.								

My Tasks 1 ?

5 Click the "*Title" field and enter the title of your task.

Example 11.3.25 Recording / 26-0099-P0001 / New Task

New Task

* Title 100 character limit

Milestone Select Milestone

Category Select Category

* Description 4000 character limit

* Assign to ☒ Person ☐ Team

* Person Select Person

Internal Due Date MM/DD/YYYY

* External Due Date MM/DD/YYYY

Reminders No reminders

+ Add Reminder

6

Click the "* Description" field and type the instructions for your task.

New Task Cancel

* Title

100 character limit

Milestone

Category

* Description

4000 character limit

URL

Add Attachment

* Assign to
☒ Person
☐ Team

* Person

Internal Due Date

* External Due Date

Reminders

[+ Add Reminder](#)

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Click "Select Person" and begin typing the person's name who you are assigning the task to.

Projects Products Alice Administrator

Projects Awards Subawards Reporting More

[Example 11.3.25 Recording](#) / [Z6-0059-P0001](#) / New Task Cancel Assign and Send

* Assign to
☒ Person
☐ Team

* Person

Internal Due Date

* External Due Date

Reminders

[+ Add Reminder](#)

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8 Click their name in the drop down box.

Projects Alice Administrator

Projects Awards Subawards Reporting More

Example 11.3.25 Recording / 26-0092-P0001 / New Task

Cancel Assign and Send

* Assign to

- ☒ Person
- ☐ Team

* Person

Q Irene in

- > Expand All
- > Irene Investigator

* External Due Date

MM/DD/YYYY

Reminders

No reminders

+ Add Reminder

9 Click the "* External Due Date" field.

Example 11.3.25 Recording / 26-0092-P0001 / New Task

Cancel Assign and Send

* Assign to

- ☒ Person
- ☐ Team

* Person

Q Irene Investigator

Internal Due Date

MM/DD/YYYY

* External Due Date

MM/DD/YYYY

Reminders

No reminders

+ Add Reminder

10 Select the due date of the task.

The screenshot shows a task assignment form. On the right side, under the 'Assign to' section, the 'Person' radio button is selected. Below it, a search bar contains 'Irene Investigator'. Further down, there are two date pickers: 'Internal Due Date' and 'External Due Date', both showing 'MM/DD/YYYY'. A calendar for November 2025 is open, with the 19th highlighted. The calendar shows days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates from 1 to 30. The 19th is circled in orange. At the bottom right, there is a 'My Tasks' sidebar with a red notification bubble and a question mark icon.

11 You can set automatic reminders by clicking "+Add Reminder".

The screenshot shows the same task assignment form, but now the 'Reminders' section is visible. It shows 'No reminders' and a '+ Add Reminder' button, which is circled in orange. The 'Internal Due Date' and 'External Due Date' fields are now filled with '12/3/2025'. The 'Assign to' section remains the same, with 'Person' selected and 'Irene Investigator' in the search bar. The 'My Tasks' sidebar is still present at the bottom right.

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Type the number of days and select the appropriate radio button for your reminder.

Proposals Projects Awards Subawards Reporting More

MyActive Projects / Example.11.3.25 Recording / 26-0029-P0001 / New Task

New Task Cancel Assign and Send

* Title
Example
500 character limit

Milestone
Select Milestone

Category
Select Category

* Description
Dear PI,
Please send the budget justification.
4000 character limit

URL
/sp/proposals/d13c9acb-381c-4593-b270-5c76b56bcc2

Add Attachment

* Assign to
☒ Person
☐ Team

* Person
Irene Investigator

Internal Due Date
MM/DD/YYYY

* External Due Date
12/3/2025

Reminders
No reminders

* New Reminder
2 Days

☐ Before Internal Due Date
☐ After Internal Due Date
☒ Before External Due Date
☐ After External Due Date

Cancel Save

+ Add Reminder

My Tasks

13

Click "Save"

Cancel Assign and Send

* Assign to
☒ Person
☐ Team

* Person
Irene Investigator

Internal Due Date
MM/DD/YYYY

* External Due Date
12/3/2025

Reminders
No reminders

* New Reminder
2 Days

☐ Before Internal Due Date
☐ After Internal Due Date
☒ Before External Due Date
☐ After External Due Date

Cancel Save

+ Add Reminder

My Tasks

14 Click "Assign and Send" to complete your task assignment.

Projects

Products Alice Administrator

Projects Awards Subawards Reporting More

Example 11.3.25 Recording / 26-0099-P0001 / New Task

Cancel Assign and Send

* Assign to

☒ Person

☐ Team

* Person

Q Irene Investigator x

Internal Due Date

MM/DD/YYYY

* External Due Date

12/3/2025

Reminders

2 days before External Due Date - 12/1/2025

1 day before External Due Date - 12/2/2025

+ Add Reminder

15 You will be brought back to the tasks tab under that proposal. Here you can view the task history. Click the Closed checkbox to view closed tasks as well.

Your new task has been assigned and sent.

Total Sponsor Costs: \$

Proposal Form Routing History Access **Tasks** Notes Attachments Links Admin Only

+ Link to Milestone Create New

STATUS	<input type="checkbox"/>	ID	Title	Type	Milestone ID	Category	Progress	Assigned to	Internal Due Date	External Due Date
<input checked="" type="checkbox"/> Open										
<input checked="" type="checkbox"/> In Progress		26-02-0050	Example	SP Adhoc				Irene Investigator morgan.chapman*investigator@cayuse.com School of Professional Nursing		12/3/2025
<input checked="" type="checkbox"/> On Hold										
<input checked="" type="checkbox"/> Closed										

10 per page

Showing 1 / 1 items

TYPE

☒ SP Adhoc

☒ SP Milestone