Overview

This document provides a step-by-step process for how to assign tasks and add events to a user on the CBMS Home Page. This access is strictly limited to supervisory roles and the profiles will be set accordingly by your Security Administrator.

Process to Assign a Task

1) In the Today's Tasks card, click on the View All hyperlink.
2) Click the **New Task** button in the right-hand corner of the task page.
3) Change the **Assigned To** field to the user you want to add a task for.
   - Complete all other required fields and details in the pop-out box.
4) Click **Save.**
5) A confirmation message will appear at the top of the page showing the task has been created.
6) Click on the My Tasks drop down arrow to filter out tasks. The options are:
   - **My Tasks**: tasks that are assigned to you.
   - **Today**: only see tasks that are due today.
   - **All Overdue**: any overdue tasks will show on this list
   - **Completed within 7 days:** tasks that you completed within the last 7 days
   - **Delegated**: these are tasks that you have assigned to other users
7) Click on the task title on the left side of the page to view the task details.
8) **Edit**, **Delete**, or **Edit Comments** buttons will allow you to update or delete the task.

Note: Once a task is marked complete by a user, ***you will not be notified***. In order to see the status of a specific user's task, you will need to use the filter options as outlined in step 6 above.

Process to Add an Event

1) In the Today's Events card, click on the View Calendar hyperlink.
2) Click the **New Event** button on the upper right corner of the calendar.
3) Change the **Assigned To** field to the user you want to add an event for.
   - Complete all other required fields and details in the pop-out box.
4) Click **Save**.
5) A confirmation message will appear at the top of the page showing the event name has been added to the calendar.
6) To view all events for a specific user, click on the wheel next to Other Calendars on the right hand side.
   a) Click **Add Shared Calendar**.
   b) Search for the user you want to add and then click on their name.
   c) Click the **Add** button.
   d) A confirmation appears at the top of the page showing the calendar has been shared.

7) Once the user’s calendar has been shared, click on the drop-down arrow next to their name in the Other Calendars section on the right.
   - **Show Only**: to view only their calendar
   - **Add Event**: quickly add an event for the user
   - **Change the color**: to easily identify and color code the user’s calendar items
   - **Remove**: to no longer see the user’s events on your calendar

Do you have any questions or suggestions regarding this process? Please contact the SDC via email SOC_StaffDevelopment@state.co.us