Task Import Guide

Field Name	Description	Valid Value
Title	Title of the task	Free text field with character limit of 255 characters
Description	Description of the task	Free Text
Task Category	Category of the task	Valid category as entered under Admin section
Person Responsible	Name of the Person responsible for task	Name as entered under user section
Business Unit	Name of the business unit. If it is left blank then it will automatically default to the business unit of the person responsible	• Business Unit name • For multiple business unit names list the names in the cell separated by a comma E.g.- Operations, Finance, Sales, Customer Service
Due Date	Due Date of the task assignment.	Date Format as defined in Admin section. Due Date must be a date in the future. It cannot be the current date or a date in the past.
Repeats	Frequency of recurrence of the task	None (for does not repeat tasks) Daily Weekly Monthly Quarterly Six-monthly Yearly
Repeat Every	Time-period for task repetition. Applicable for all the repeat options above except Quarterly and Six Monthly. E.g. Every 5 months, every 3 years	• Blank: If Repeats is also blank, follow organisational default, otherwise default to 1 • a number
Repeat By	Pattern of Task Repetition. Applicable only for the tasks set to repeat Monthly, Quarterly, or Six-monthly. E.g. Task can be set to repeat on the same day of the week or the same day of the month	• Blank: If Repeats is also blank, follow organisational default, otherwise default to Day of the Month • Day of the Month or Day of the Week
Repeat On	Day of the week when task will be repeated. Applicable only for tasks set to repeat Weekly E.g. Every Monday	• Blank: If Repeats is also blank, follow organisational default, otherwise default to the day of the week of the due date • Mon, Tue, Wed, Thu, Fri, Sat, Sun (Monday, Tuesday, etc. are also acceptable)
Comments Required	Force the person responsible to enter comments on Task completion.	None Compliant In Progress Not Compliant

	You can force the person responsible to enter comments only when they select certain response for task completion or you can also force comments on all the responses E.g.- You can force them to enter comments when they select Not Compliant	For multiple response selections, include each response type, separated by commas and no space between the comma and the next response type. E.g. Not Compliant, In Progress. If left blank, this will revert to the organisational default.
Evidence Required	Force the user to attach an evidence on action completion You can force the person responsible to upload evidence document only when they select certain response for action completion or you can also force evidence on all the responses. E.g.- You can force them to enter comments when they select Cannot do	None Compliant In Progress Not Compliant For multiple response selections, include each response type, separated by commas and no space between the comma and the next response type. E.g. Not Compliant,In Progress. If left blank, this will revert to the organisational default.
Escalation Users	Users to be notified if the action is not completed on its due date	• None • User Names, comma separated
Escalation Grace Days	Grace Period before Action escalation E.g. 1 day	a number If left blank, this will revert to the organisational default.
Linked Registers and Forms	Any item/s on the Register that is linked to the Task. Could be a Form on the Register or an entry on the Register.	The **key** of the Register/Form that is linked. More than one value is separated with a comma and no space.
Linked Checklists	Any item/s on the Checklist Register that is linked to the Task	The **key** of the Checklist that is linked. More than one value is separated with a comma and no space.
Notification on Assignment	Person responsible being notified of their assignment.	Immediate Email Batch Email (2AM)
Notification On Progress	Notification to designated user upon the task being marked 'In Progress'	Register and Forms Person Responsible Designated Escalation User
Notification On Completion	Notification to designated user upon the task being marked 'Compliant'	Register and Forms Person Responsible Designated Escalation User

Notification Before the Due Date	How many days before the due date of action should Assurance send a notification to person responsible E.g.- 1 week or 1 month	• None • X Weeks • X Months X is a number If left blank, this will revert to the organisational default
Notification Before Repeated	How many times before the due date should Assurance send notification to person responsible about the	None Weekly Monthly Quarterly
	upcoming action assigned to them.	
Notification Before Repeated On	The day of the week that reminders are repeated.	Mon, Tue, Wed, Thu, Fri, Sat, Sun (Monday, Tuesday, and etc are also acceptable)
Notification After the Due Date	How frequently the responsible user will receive reminder after the action is overdue	• Weekly/ Monthly/ Quarterly Notification After Repeated on • Mon, Tue, Wed, Thu, Fri, Sat, Sun (Monday, Tuesday, and etc are also acceptable)
Notification After Repeated On	The day that overdue reminders are repeated.	• Mon, Tue, Wed, Thu, Fri, Sat, Sun (Monday, Tuesday, and etc are also acceptable)

Helpful Hints

- Any additional custom fields can be added through Layouts > Tasks OR Layouts > Task Assignment
- Multiple values in a single cell should be separated by a comma only (no space)
- For non-free text fields, ensure not to have a space at the end of the value in a cell