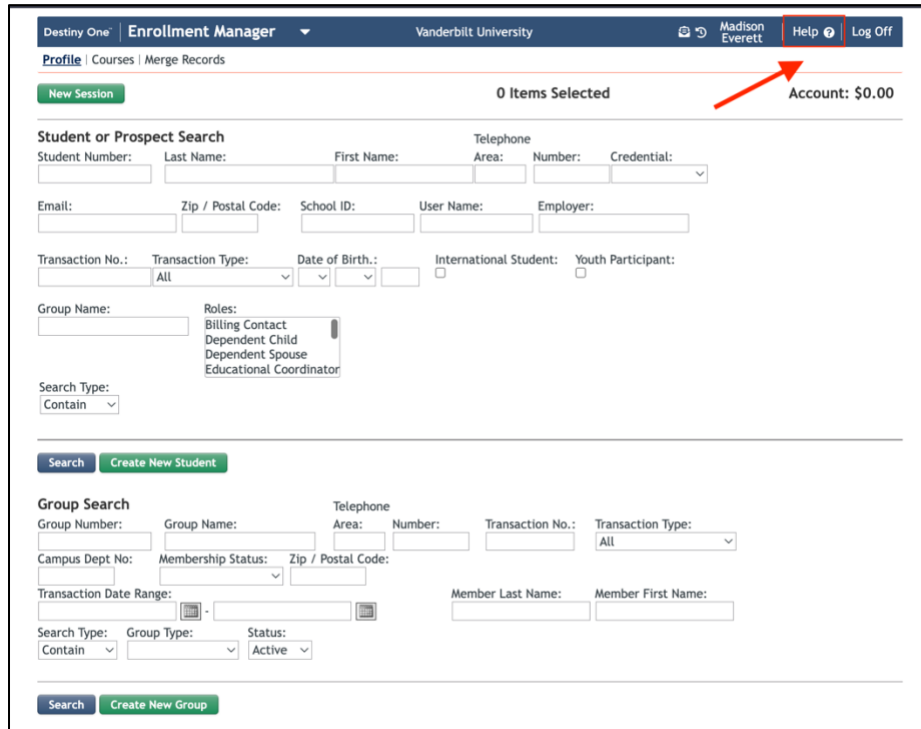


D1 Staff View Guide – Task Manager

Welcome to the Destiny Staff View Guide! Use **cmd + f** or **ctrl + f** to navigate the document or use the Table of Contents on the following page to direct your search.

NOTE: The following guide is a brief overview of the most common actions and situations that Program Admins may encounter while utilizing the Destiny One system. For more in-depth help, please access the Admin Guides in Destiny One by clicking the **HELP** option on the navigation tab. For any further questions, please contact psi-list@vanderbilt.edu.



How to navigate to the Task List page and view your tasks

When there is a new task, a yellow paper icon will appear in the top navigation bar to the left of your name. Clicking this icon will take you to the **Task List** page. You can also access tasks by:

1. Navigate to **Task Manager**.
2. Select **Task List** in the second navigation tier. The **My Tasks** page appears listing your assigned tasks in a table. The default view shows new tasks assigned within the past two weeks.
3. Optionally, use the drop-down lists at the top of the page and click **Go** to filter the table by task status and/or time.

How to complete a task

Note: Do not click **Complete** until you have completed the task. Some tasks can only be completed via the task link and for those tasks the link is deactivated once you complete the

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task. If you click **Complete** by accident and the link no longer functions, then you, the student or another staff user need to re-create the process that generated the task.

1. Navigate to your **Task List**.
2. Click on the task link in the **Item** column. D1 navigates you to where the item is awaiting action.
3. Perform the required action. In many cases, the system assigns the task a status of **Completed**.
4. To manually change the status of a task to Completed click **Complete** beside the task listed on the **Task List** page.

How to reassign a task

1. Navigate to your **Task List**.
2. Locate the **Task(s)** you wish to reassign and select the checkbox beside them.
3. From the drop-down list in the **Reassign** column, identify the **User** to whom the task is to be reassigned.
4. Click **Go** beside **Reassign Selected Tasks** at the bottom of the page. The page reloads with the reassigned tasks removed from the current **User Task List**.

How to remove a task from the list

Only completed tasks can be removed. You can remove completed tasks in two ways:

1. Click the remove icon beside a completed task, or
2. Click **Remove All Completed Tasks** to remove all completed tasks that are currently displayed in the table.

Note: If a task is completed but is not displayed in the table - for example if the filter is only showing new tasks - the completed tasks are not deleted when you click **Remove All Completed Tasks**.

Common tasks

Refund Approval: One of the most common tasks in D1 is approving Credit Card or Debit Card refunds.

1. Clicking a refund approval task will navigate you to the student's account page.
2. To approve the refund, review the student's information and enter the authorization number in the **Reference No.** field.
3. Click the blue **Approve** button. This completes this task.