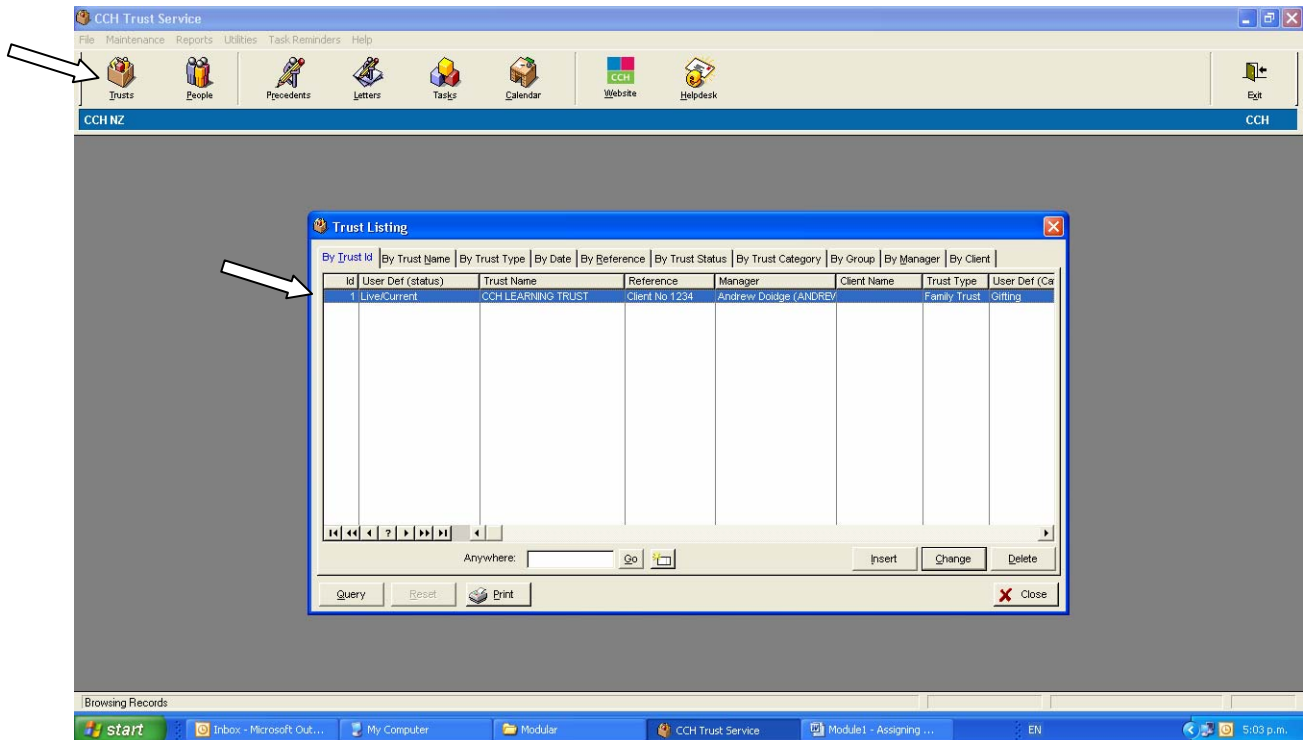


TRUST SERVICE TRAINING - LEVEL 1

SESSION 4.1

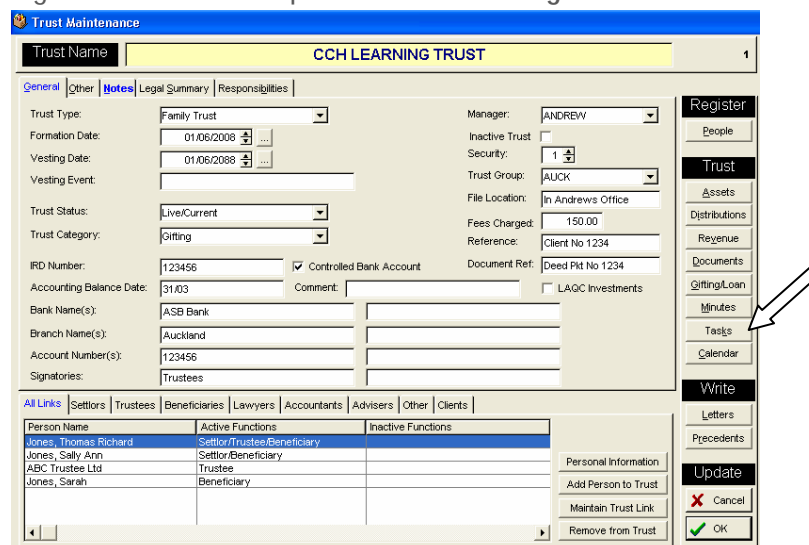
ADDING A TASK TO THE TASK LIST

Select Trust Shortcut, then select Trust from List (double click or select Change)

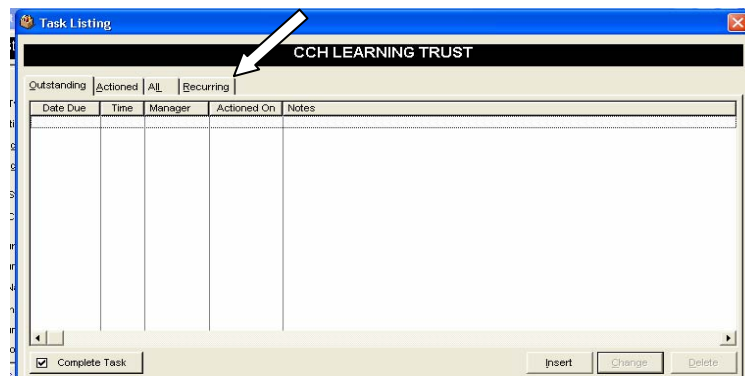


You can access the Task List from the top toolbar, however, the most effective route is to go via the Trust as shown above

Select Tasks from Right Hand Menu to open the Task Listing

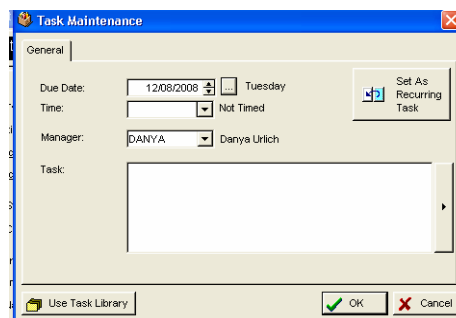


This opens the Task Listing screen.



There are 4 Views available by clicking on the tabs at the top; Outstanding Tasks, Actioned Tasks, All Task or Recurring Tasks.

Select Insert to insert a new task



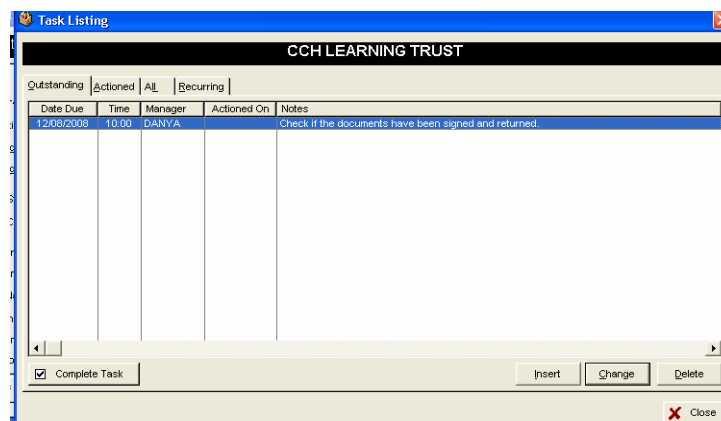
Type or Select the due date

Type or Select a Time if required

Select the Manager of the Task (this will be the Manager of the Trust rather than the administrator who may actually complete the task)

Type the details of the Task

Click OK to Save



ADDING A RECURRING TASK TO THE TASK LIST

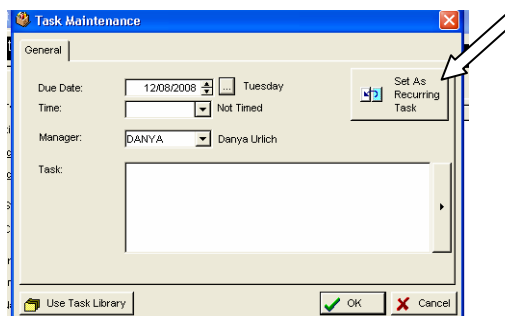
A recurring task can set to recur on a daily, weekly, monthly or annual basis.
Tasks will only recur once they have been completed

Open the Task List (as before)

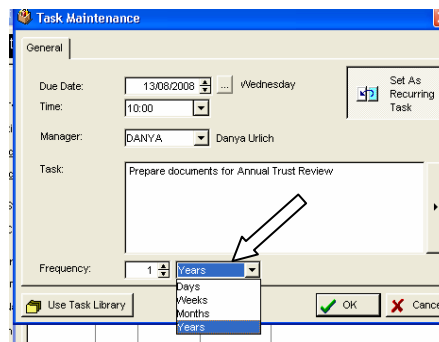
Select Insert

Add details of Task (as before)

Select Set as Recurring Task



Type the number & select the unit (days, weeks, months or years) for the recurrence

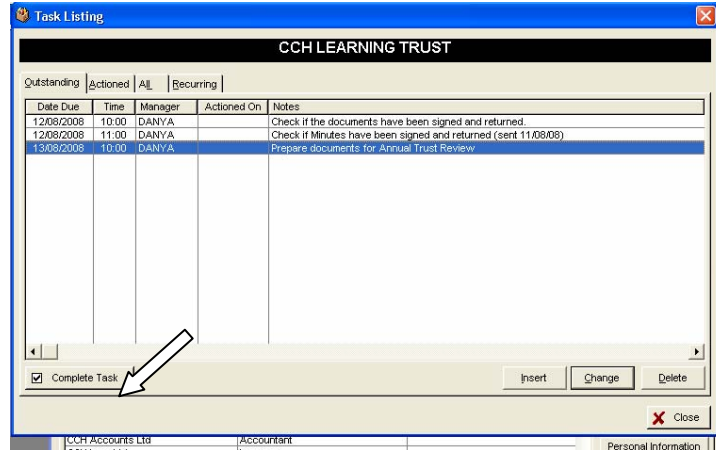


Click OK to Save

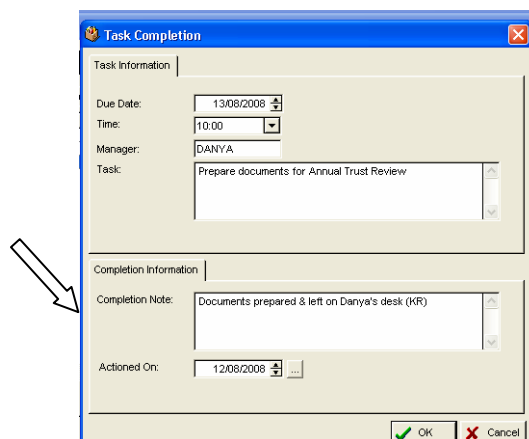
Tasks added to the Task List will also show on the Calendar.

COMPLETING A TASK

Open the Task Listing (as above)



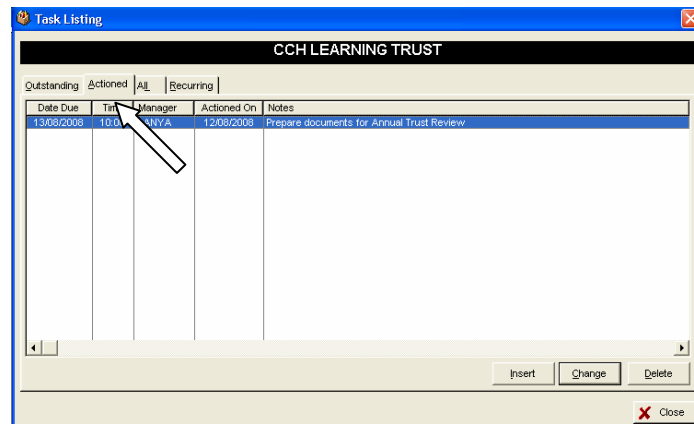
Highlight the task to be completed, select Complete Task



Add any Completion Notes & Select or Type the completion date

Click OK to Save

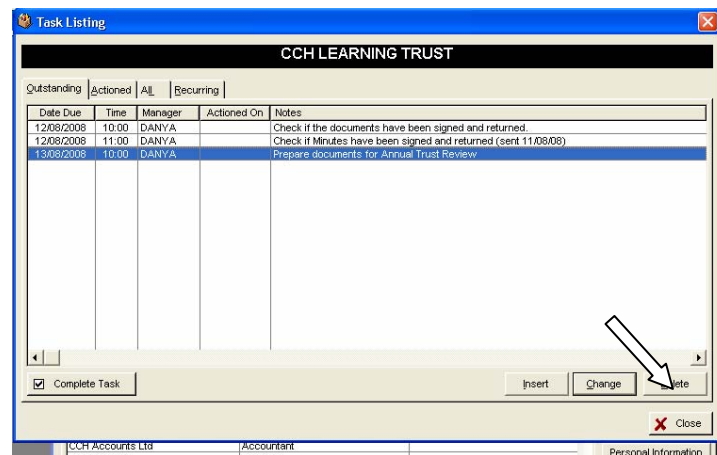
The completed task will be removed from the **Outstanding** Tab and will now be seen on the **Actioned** Tab



Note: A recurring task will only recur if the original task is completed

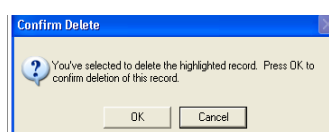
DELETING A TASK

Highlight the Task & select Delete



Note: If the Delete button is not shown on screen (when accessing Task list from top toolbar shortcut) use the Delete button on your keyboard.

A warning message will appear, click **OK** to confirm deletion



The Task is now deleted