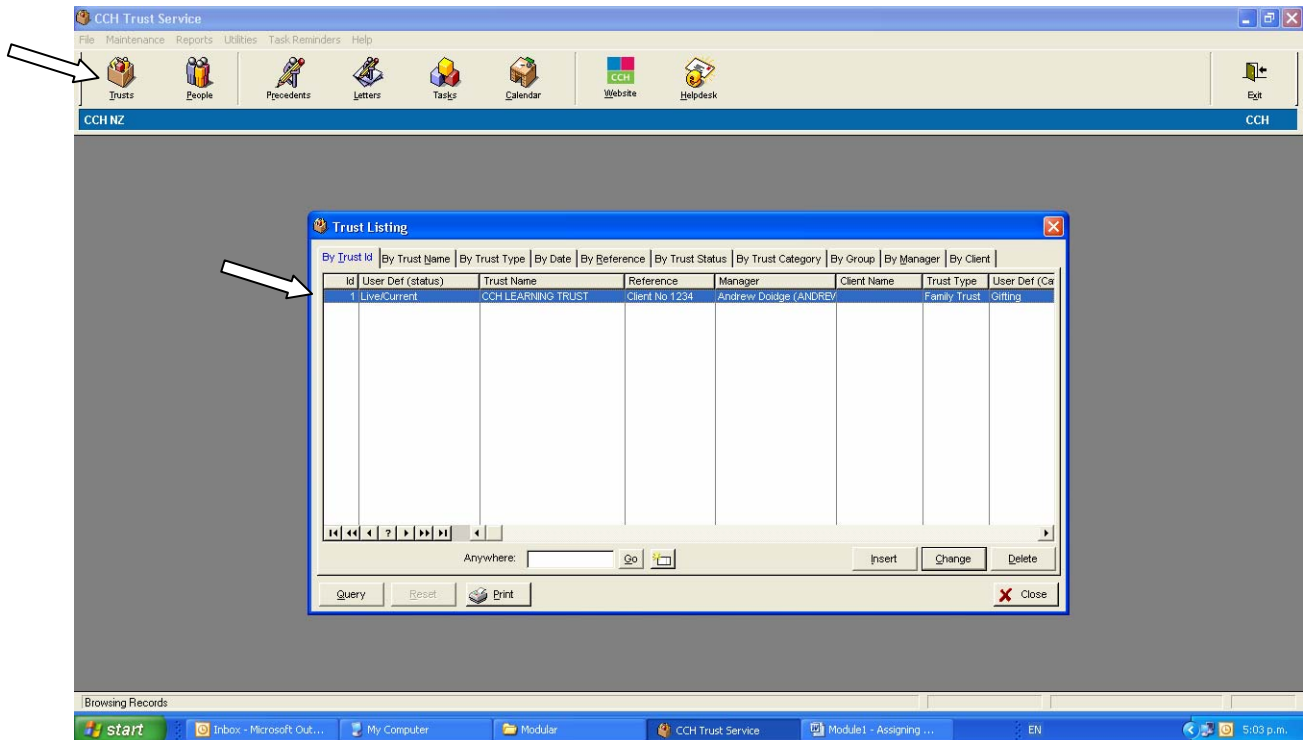


TRUST SERVICE TRAINING - LEVEL 1

SESSION 4.3

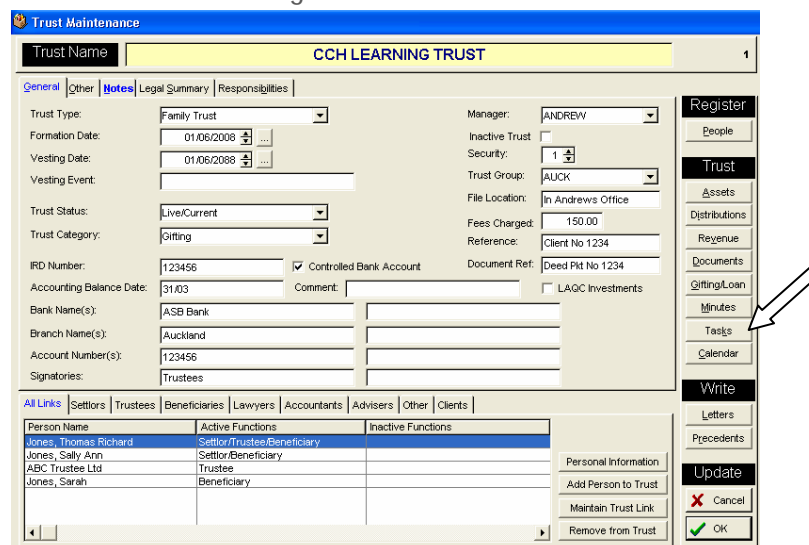
ADDING A TASK USING THE TASK LIBRARY

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



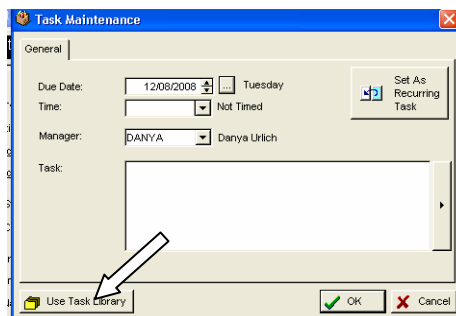
You can access the Task List from the top toolbar, however, the most effective route is to go via the Trust as shown above

Select either Tasks or Calendar from Right Hand Menu



VIA TASK LISTING

Select Insert to insert a new task

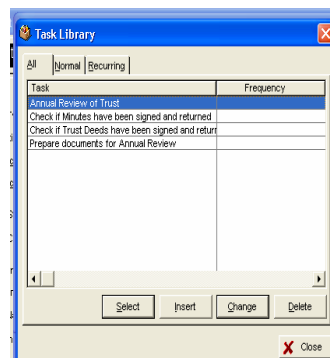


Type or Select the due date

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)

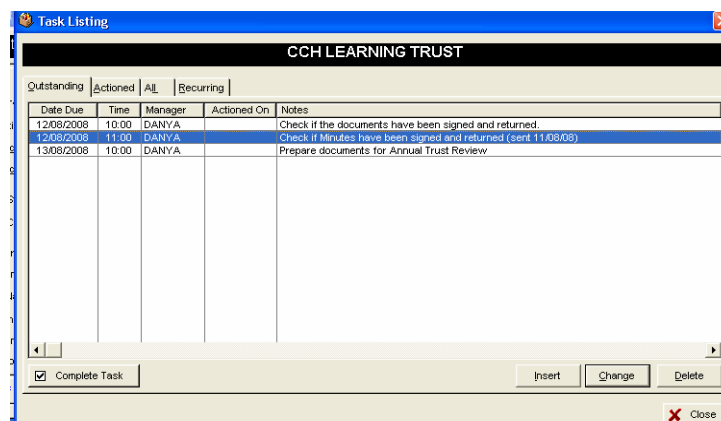
Select Use Task Library



Select a Task from the Use Task Library.

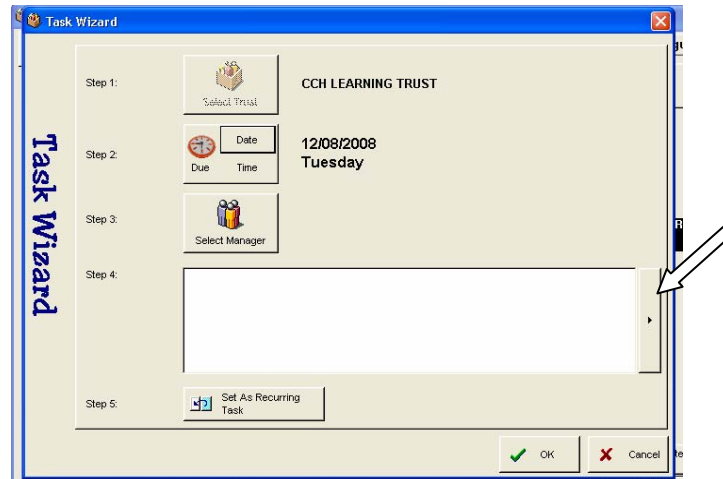
Once selected you can then add additional text to the task if required. For example; if you selected 'Check if Minutes have been signed and returned', you may add 'sent on 11/12/08' to the actual task

Click OK to Save



VIA CALENDAR

Select Insert to insert a new task

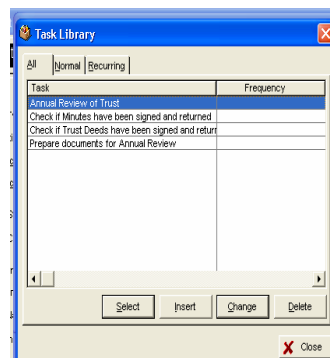


Type or Select the due date

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)

Select the Arrow to the right of Step 4 to use the Task Library



Select a Task from the Use Task Library.

Once selected you can then add additional text to the task if required. For example; if you selected 'Check if Minutes have been signed and returned', you may add 'sent on 11/12/08' to the actual task

Click OK to Save