

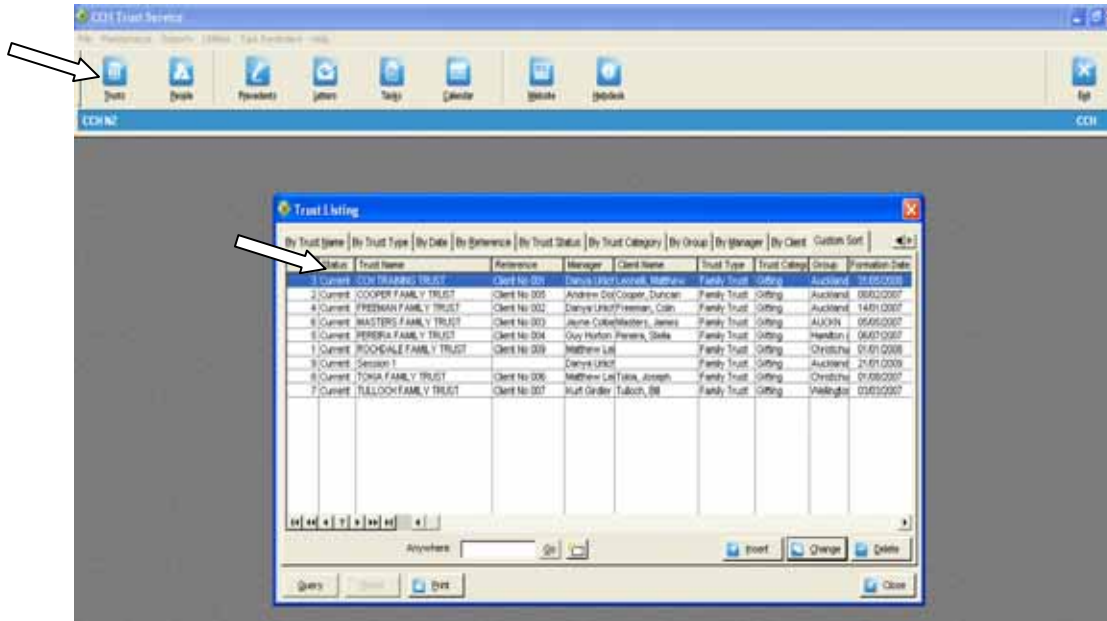
# SESSION 4.1

# LEVEL 1

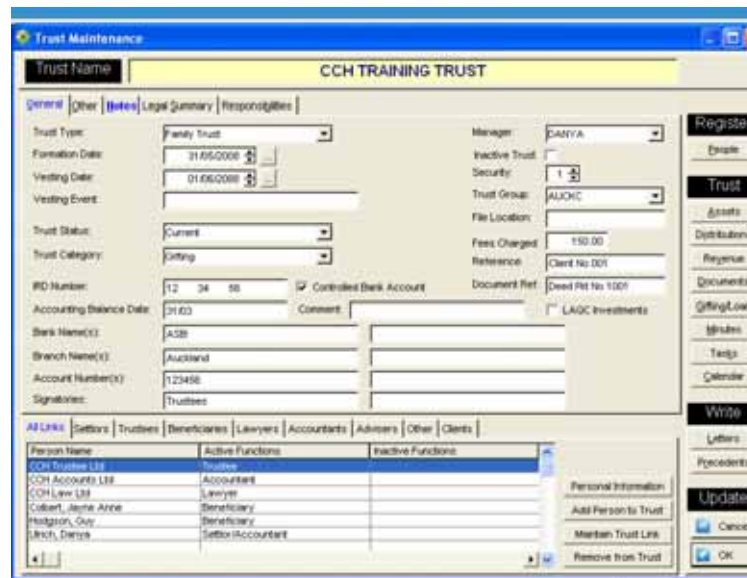
## USING THE TASK LIST

### Adding a Task

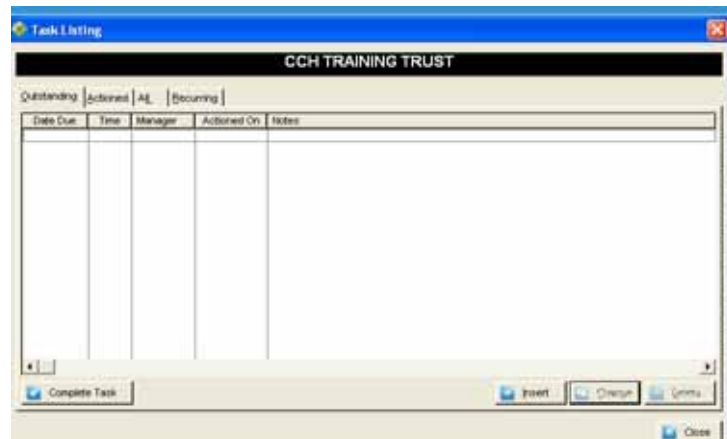
Select Trust Shortcut, then select Trust from List (double click or select Change)



Select Tasks from Right Hand Menu to open the Task List

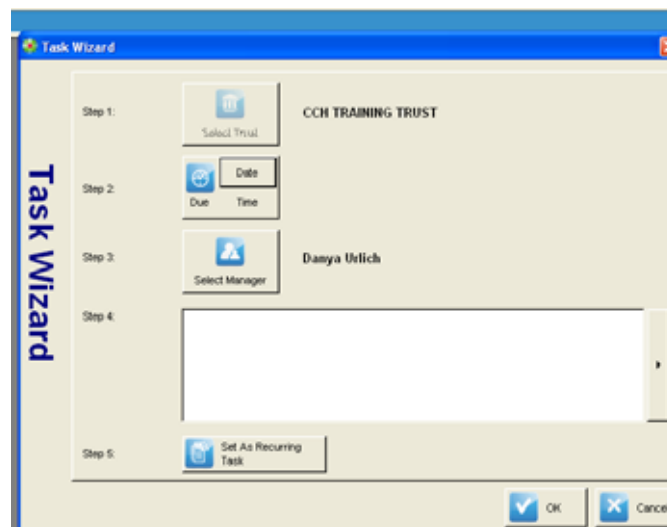


This opens the Task Listing screen.



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

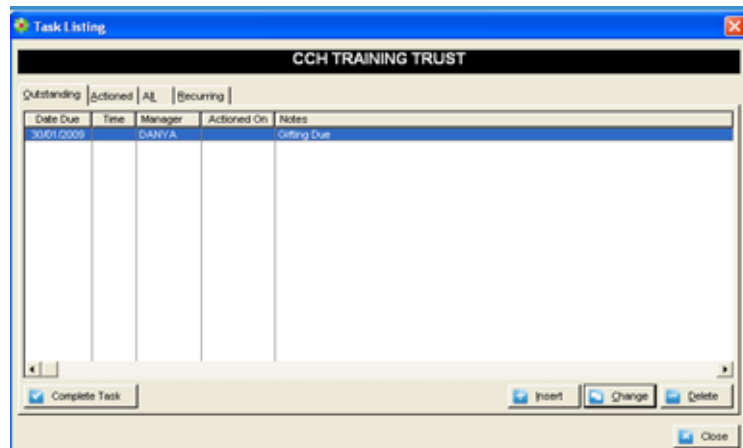
Select the Manager of the Task (this may be a Task Manager or Trust Manager\*)

Type the details of the Task

Click OK to Save

\* For more information on setting up Task or Trust Managers see notes on Session 6

The Task is now on the Task List



### Adding a Recurring Task to the Task List

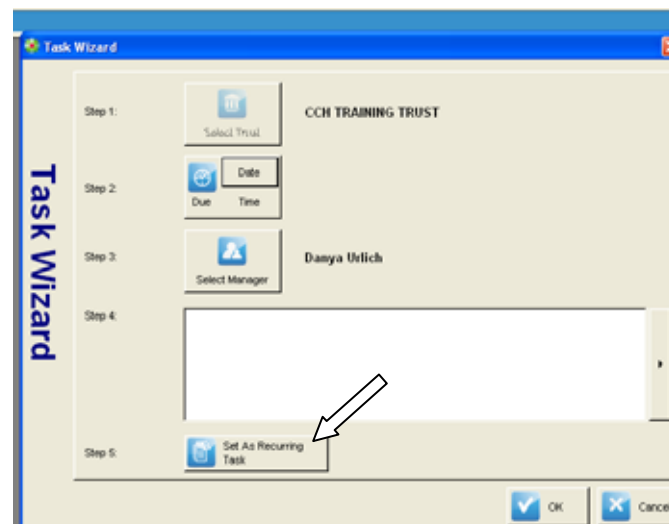
A recurring task can set to recur on a daily, weekly, monthly or annual basis. Tasks will only recur once they have been completed

Open the Task List (as before)

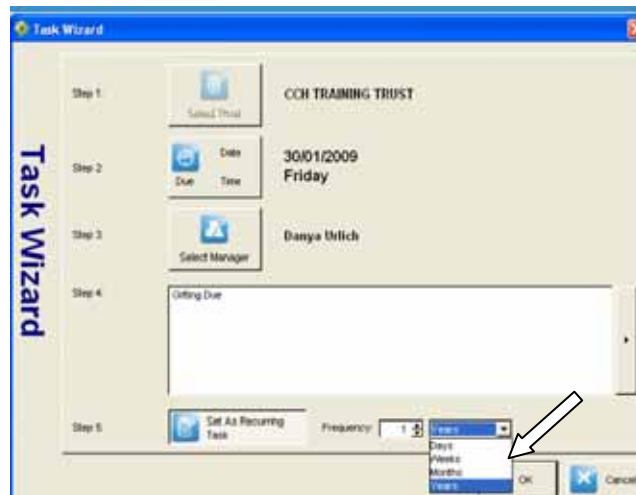
Select Insert

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

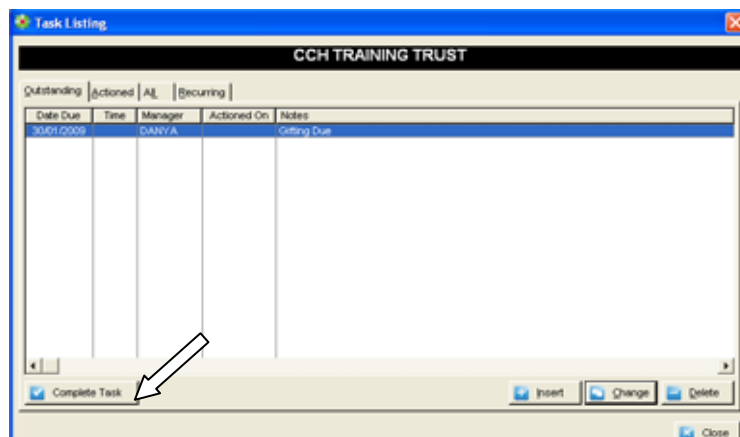


Click OK to Save

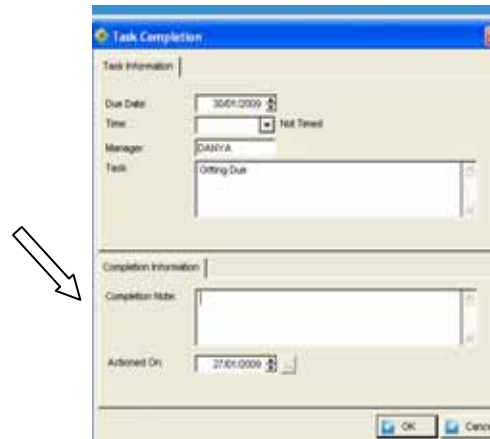
Tasks added to the Task List will also show on the Calendar.

### Completing a Task

Open the Task Listing (as above)



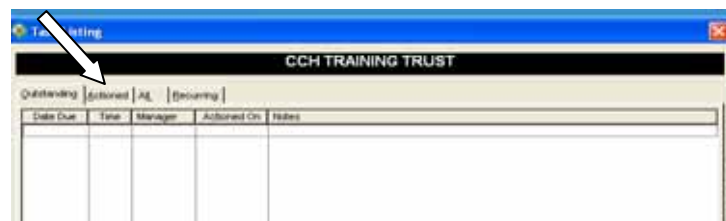
Highlight the task to be completed, select Complete Task



Add any Completion Notes & Select or Type the completion date

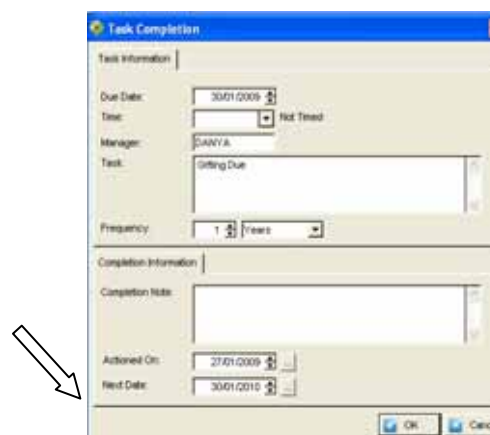
Click OK to Save

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



| Date Due | Time | Manager | Actioned On | Notes |
|----------|------|---------|-------------|-------|
|          |      |         |             |       |

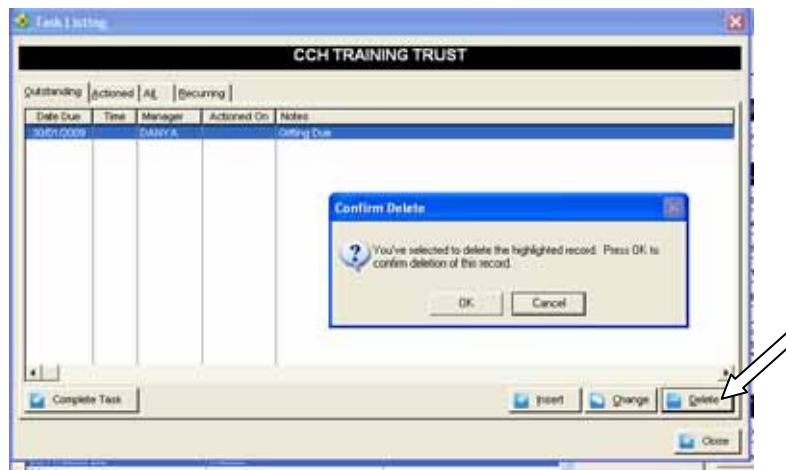
If the Task is set to recur you should also complete the Next Action Date. The Completed Task will now appear on the Actioned Tab and the next recurrence of the Task will appear on the Outstanding tab with the new date.



**IMPORTANT:** A recurring task will only recur if the original task is completed.

## Deleting a Task

Highlight the Task & select Delete



A warning message will appear, click OK to confirm deletion

The Task is now deleted