

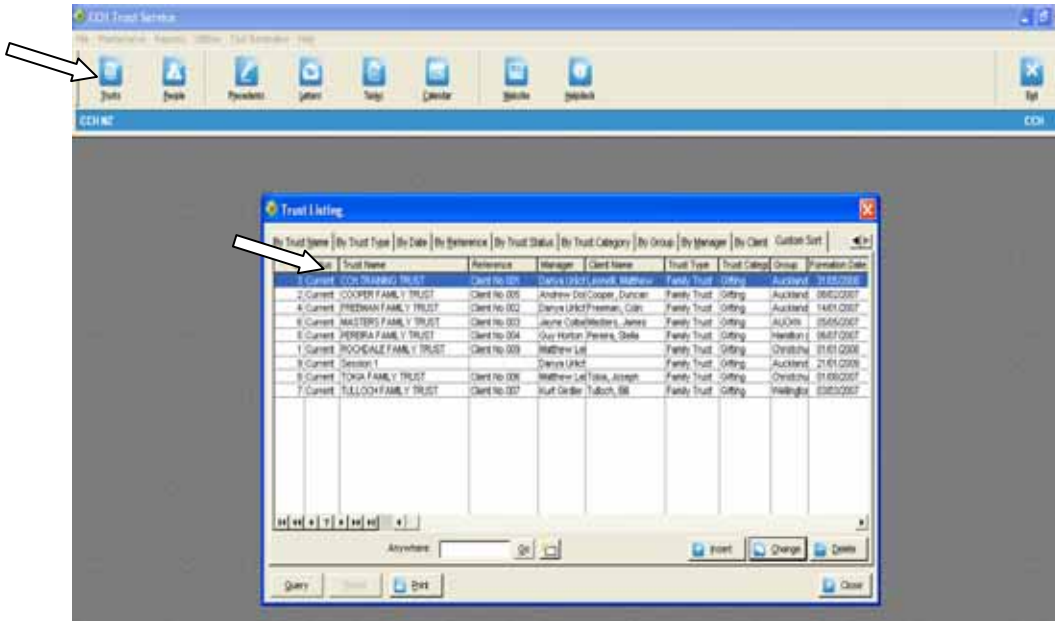
## SESSION 4.2

## LEVEL 1

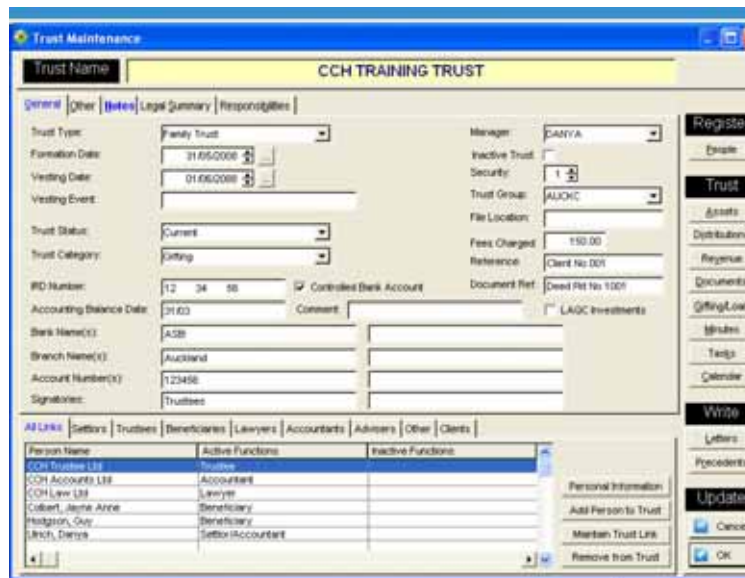
### USING THE CALENDAR

#### Adding a Task via the Calendar

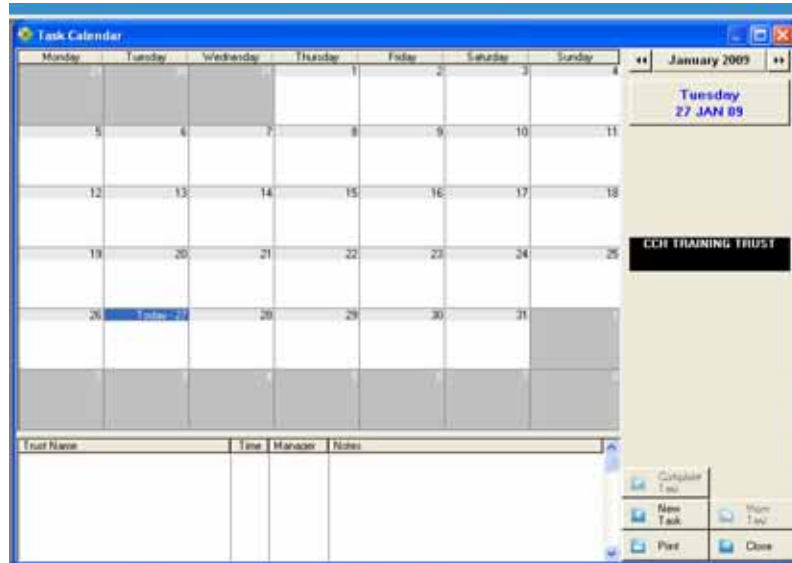
Select Trust Shortcut, then select Trust from List (double click or select Change)



Select Calendar from Right Hand Menu to open the Calendar



This opens the Calendar screen.



Select New Task to insert a new Task



Type or Select the due date. This will be automatically set at Today's date

Type or Select a Time if required

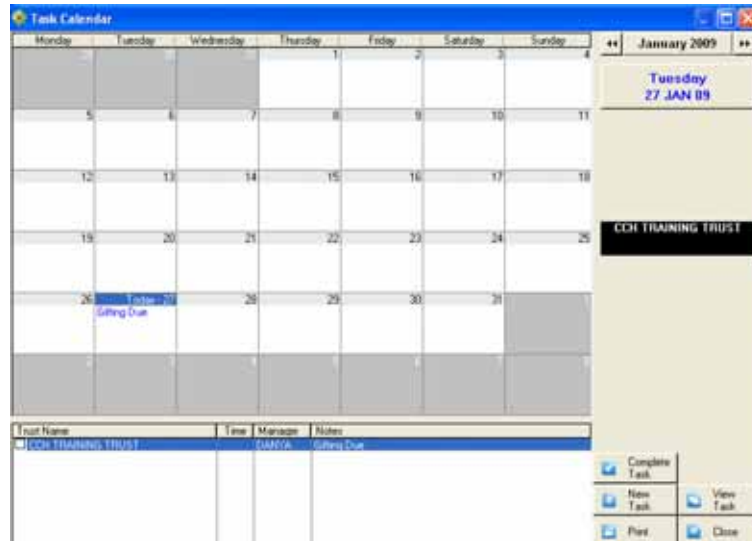
Select the Manager of the Task (this may be a Task Manager or Trust Manager\*)

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 Calendar



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

### Adding a Recurring Task to the Calendar

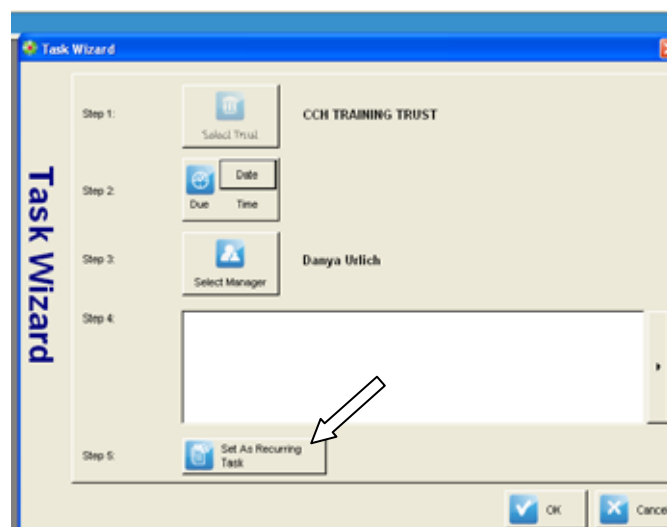
A recurring task can set to recur on a daily, weekly, monthly or annual basis. Tasks will only recur once they have been completed

Open the Calendar (as before)

Select Insert

Add details of Task (as before)

Select Set as Recurring Task



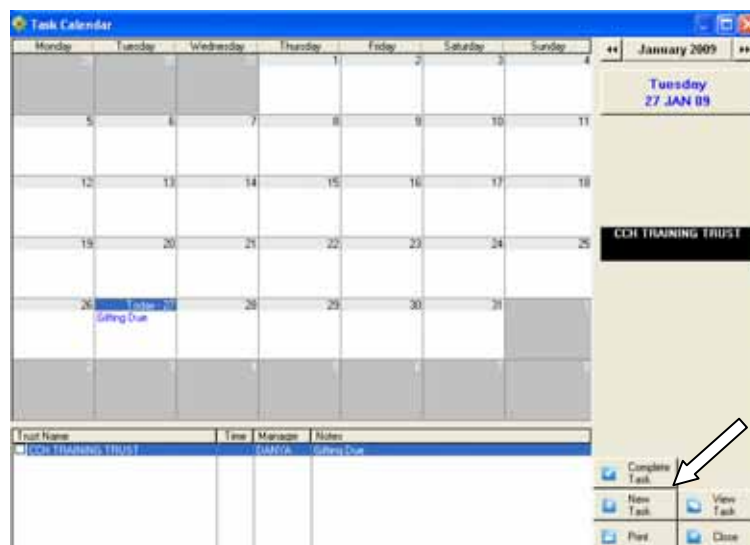
Type the number & select the unit (days, weeks, months or years) for the recurrence



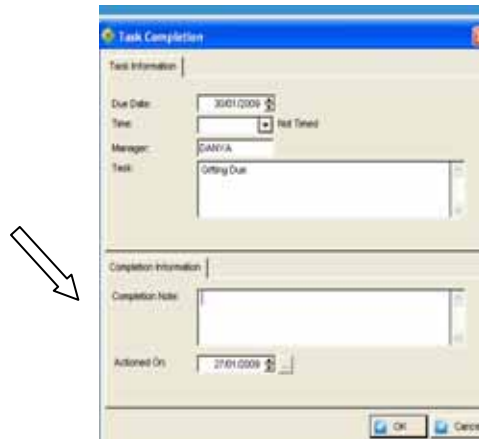
Click OK to Save

### Completing a Task

Open the Calendar (as above)



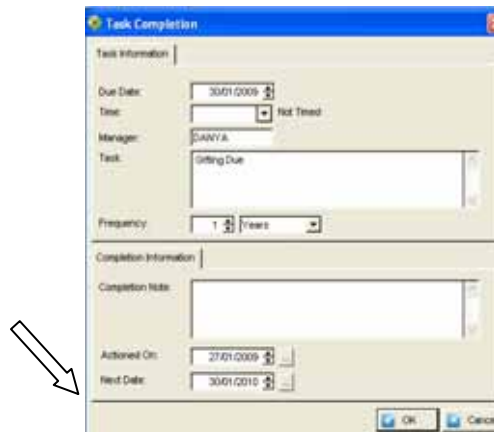
Highlight the task to be completed, select Complete Task



Add any Completion Notes & Select or Type the completion date

Click OK to Save

If the Task is set to recur you should also complete the Next Action Date. The next recurrence of this task will now appear on the calendar on the Next Action Date



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

### Deleting a Task

Highlight the Task & select Delete on the keyboard

A warning message will appear, click OK to confirm deletion

The Task is now deleted

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