

SESSION 4.4

LEVEL 1

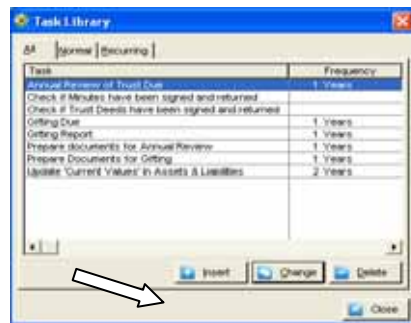
SETTING UP THE TASK LIBRARY

Select Maintenance > Libraries > Task Library



If you cannot access these options you may not have sufficient user privileges.

Select Insert to add a new template to the Task Library



Type the details of your Task Template and select OK to save



Type only the general details in the Template, more specific information can be added on a Trust by Trust basis when the task is added to the individual trust.

If the Task is recurring, select Set as Recurring Task and complete the details.

Your template is now added to the Task Library and can be used via either the task list or calendar.