

Tasks & Calendars

In this session we learned how to:-

- Add a Task to the Task List
- Add a Task to the Calendar
- Add a Task using the Task Library
- Set up Tasks Templates in the Task library
- Complete & Delete a Task
- View the Task List & Calendar (Single Trust or All Trusts)
- Print the Task Report

Action Points

Question	✓	Session Required	Date
Do you have the appropriate user privileges? This will be controlled by someone in your organization		Discuss internally	
Do you need to change user privileges?		Session 5	
Do we need to set up our Task Library?		Discuss internally	
Do we need to agree a policy on Task usage, for example all using Outlook or all using Trust Service?		Discuss internally	
Do we need to clear out all old tasks that have not been completed?		Discuss internally	
Do we want to change our user settings to display the task list on start of day?		Session 5	
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	

For further help:

Select Help to access the Trust Service Help Files



Visit WWW.CCH.CO.NZ for training notes on previous session, notes are posted approx 7 days prior to the next session. You can access training notes for session you are not attending.

Contact Tech Support 0800 500 224 for technical issues

Email Training@cch.co.nz if you have 'how to' questions. Emails are answered 1day per week only, usually on Thursday or Friday