

How to Use the Tasks Tool

The Tasks tool allows users to create jobs for themselves and other users of their account. Tasks can be linked to specific Contact or Session Group records and can then be updated as the work progresses. Task widgets can also be added to a user's dashboard, so that they can easily keep track of the tasks that they are interested in.

How to Enable the Tasks tool

In order for a user to access Tasks, the tool first needs to be enabled for their User Group:

- Hover over **My Account** and select **Administration**
- Select **User Access** from the Access & Security section on the left-hand side
- Select **User Groups** from the sub-menu on the left-hand side
- Click on the **Configure** icon to the right of the relevant User Group 
- In the **Configure** column, change **External Forms** to **ENABLED**
- Enter your user password and click **Save**

How to Create an Associated Task

Tasks can be associated with any Contact Type (e.g. Participants, Staff, Volunteers) or Session Group record. To create a task that is associated with a specific record:

- Click on the name of the record that you wish to add a task to
- Select **Tasks** from the tabs on the left-hand side
- Click on the plus  icon
- Enter the details about the task and click **Save**

How to Create an Unassociated Task

Tasks can also be created that are not associated to any specific record:

- Hover over **My Account** and select **Tasks**
- Click on the plus  icon
- Enter the details about the task and click **Save**

How to Update a Task

To update an existing task:

- Click on the name of the record that you wish to edit a task for
- Select **Tasks** from the tabs on the left-hand side
- Click on the pencil icon next to the task that you wish to edit 
- Make the required updates and click **Save**

A history of updates to the task will be displayed at the bottom of the page.

How to Access the Tasks Overview Page

A user can access an overview of tasks with this process:

- Hover over **My Account** and select **Tasks**

All open tasks currently assigned to the user will be displayed. Further tabs on this page enable the user to view closed tasks assigned to them, as well as all open and closed tasks in their account.

How to Add a Tasks Widget to the Dashboard

Users can add lists of tasks to their dashboard home page, making it easy to keep track of the tasks that are relevant to them. This can be done with the following process:

- From the home screen, select **Customise Dashboard** from the tabs on the left-hand side
- Click on the pencil icon next to the dashboard that you wish to add the widget to 
- Select **Tasks** in the **Add a Widget** menu
- Enter the details for the Tasks that you wish to appear in the widget. For example, select **Open** in the **Status** menu to only list Open tasks, or select your name in the **Assigned to** menu to only view tasks assigned to you
- Click **Add** to create the widget

The selected list of tasks will now be displayed in the widget on the home screen. This process can be repeated to add different lists of Tasks to the dashboard.