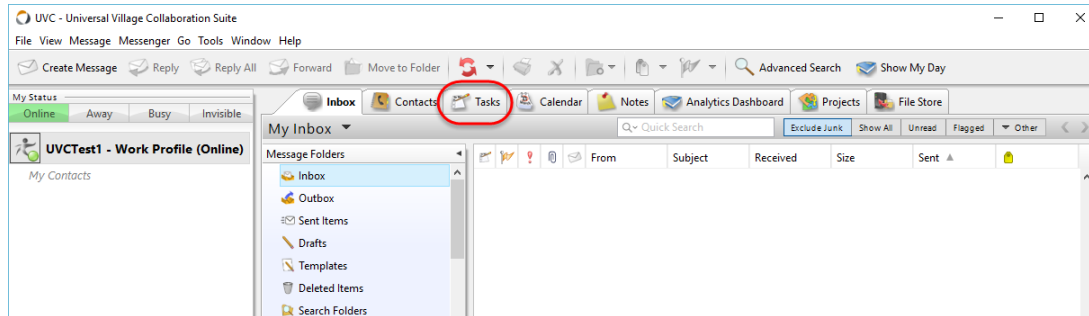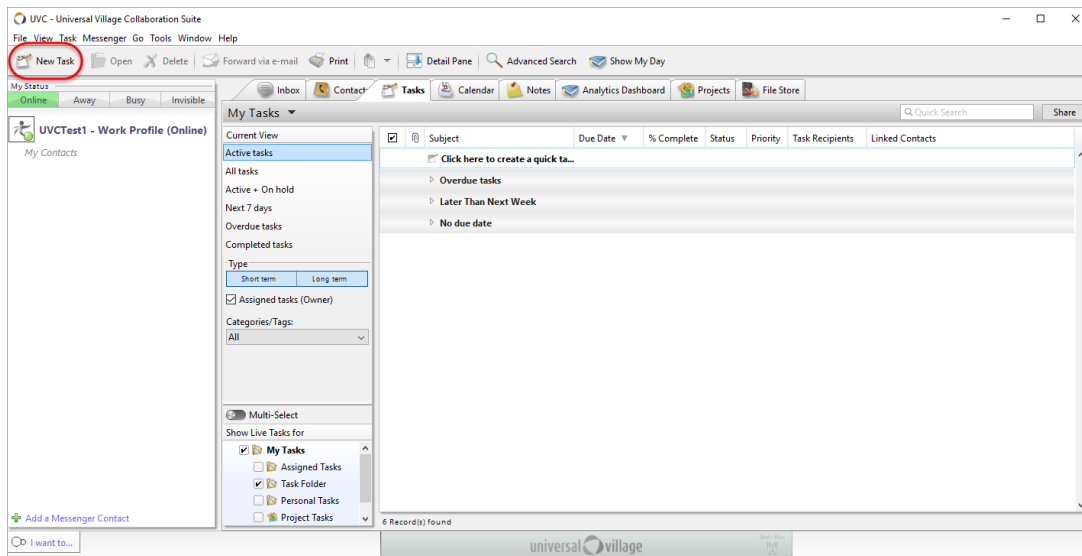## Task Module

To access the task area if you are in the Tab view simply click on the **Tasks** tab, if you are in the Special view simply click on the large **Tasks** button on the left.

To Add a New Task

To add a new task to the database use the following steps:

1. Click on the New Task button to create a task.


2. Fill out the appropriate information for the task you are adding.

Due Date

The due date can be used if a task should be completed by a certain date. However, if a due date is not known or does not apply the field can be left blank.

Folder Group

The folder group allows you to put a task into a folder group that you have already set up (Options and Preferences). If you have put your tasks into folders you are able to search and sort by your folders on the screen.
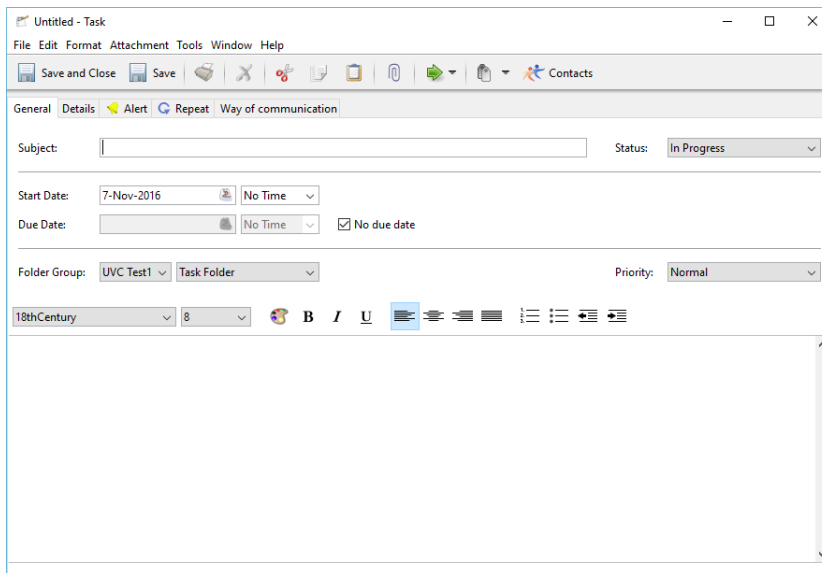
Categories

You are able to put your tasks into different categories that you have already set up (Options and Preferences) so that you are able to group, search and print by them in the module.
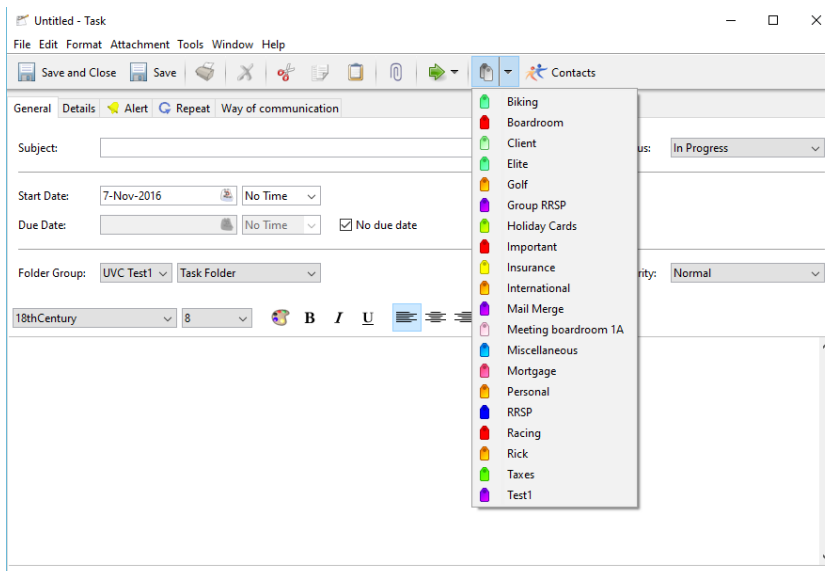

Details Tab

In this tab you are able to specify what percentage of the work has been completed and other details that are well suited to tasks that are part of bigger projects. You are also able to assign tasks to different users by placing a checkmark beside their name at the bottom of the screen. Once you do that it will send a message indicating that the user has a new task assignment.

If you do assign a task to a user the task will show up in the user's task module (under the assigned task folder).

Select the **Send a new task notification message** if you want the assigned task recipient to be able to get a notification message that a new task has been delegated to them.

Select the **Allow assignee to modify all fields including due date** if you want the task recipient to be able to edit and change any field on this assigned task.
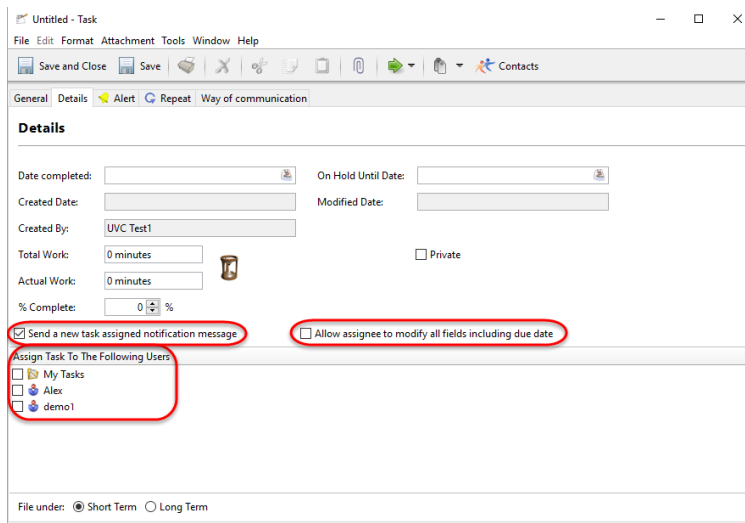
You can also link a contact to a task. Simply click on the **Contacts** button.
Add a checkmark on the name and add them to left column. Click on the **OK** button to add the contact.
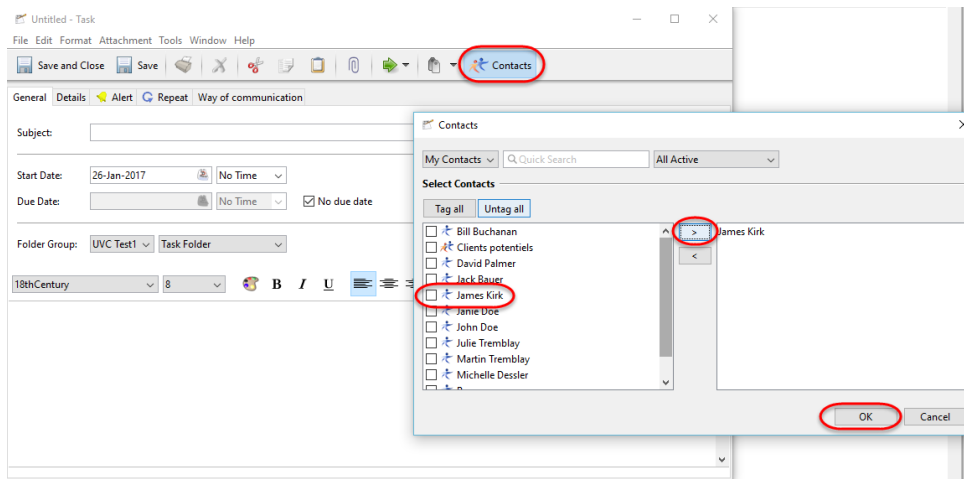
Contact(s) linked to a task will be seen under the **Linked Contacts** field.
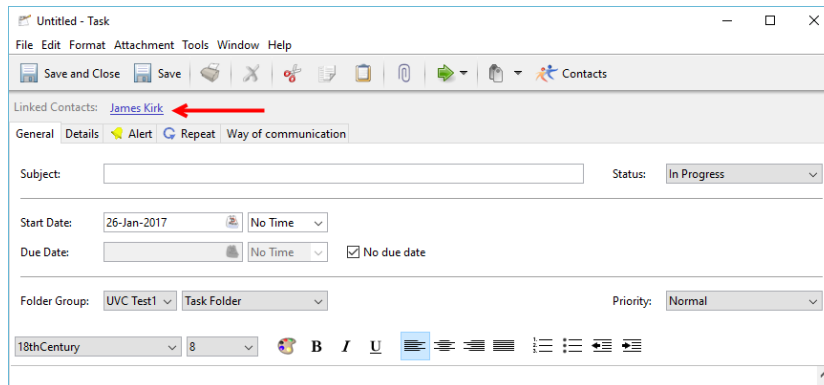
All tasks linked to a contact will be seen under their Journal Activity tab.

Repeat Tab

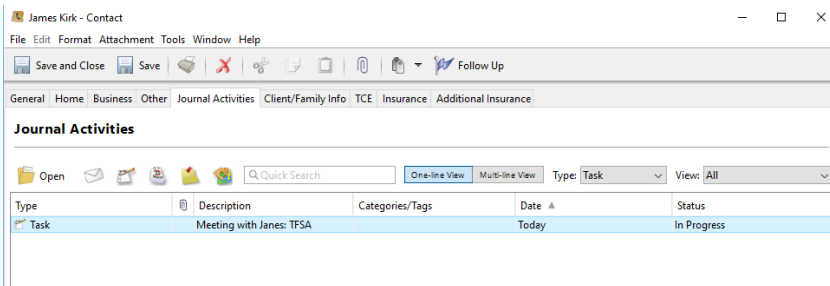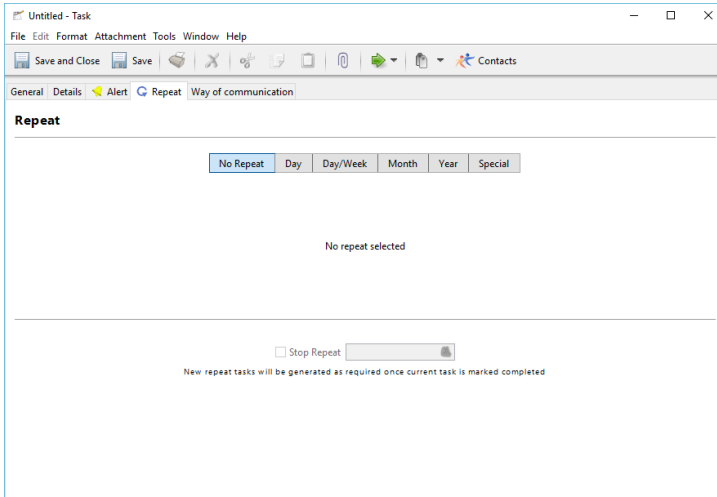To make a task a repeating task click on the **Repeat** tab at the top of the Task screen. You will then have 4 options:

Day/Week

If you would like your task to repeat every number of weeks on a particular day use the following steps:
      A. Click on the **Day/Week** button on the repeat screen.
      B. Select how often you would like the task to repeat on a weekly basis.
      C. Select which day of the week you would like the task to repeat on.

Note: The day you would like the task to repeat on does not have to be the same as the day you are entering the task for. For example, if you entered a task on a Wednesday and selected Friday to have the task to repeat, the original task would occur on Wednesday as you specified but the following repeated tasks would continue on Fridays.

The day selection however, defaults to the day you are adding the task for. If you would like it to repeat on a different day be sure to uncheck the defaulted option or the task will repeat on both days.

      D. If you know the date you would like to stop the repeated task check **Stop Repeat** and enter the appropriate date.

Month

If you would like your task to repeat on a monthly bases use the following steps:

      A. Click on the **Month** button on the repeat screen.
      B. Select how often you would like the task to repeat on a monthly basis.

Note: The task will be repeated on the same date as the original task for the month frequency you select.

      C. If you know the date you would like to stop the repeated task check **Stop Repeat** and enter the appropriate date.

Year

If you would like your task to be repeated on a yearly basis use the following steps:

      A. Click on the **Year** button on the repeat screen.
      B. Select how often you would like the task to repeat on a yearly basis.

Note: The task will be repeated on the same date as the original task for the month frequency you select.
      C. If you know the date you would like to stop the repeated task check **Stop Repeat** and enter the appropriate date.
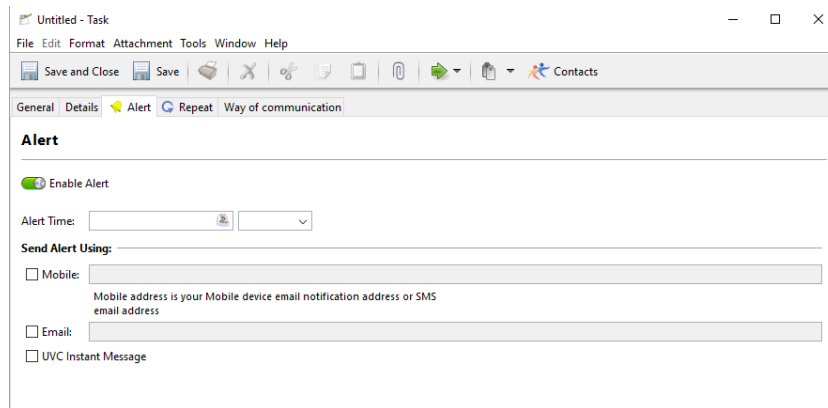
Special

If you would like to repeat a task that is not date dependent use the following steps:

> A. Click on the **Special** button on the repeat screen.
> B. Select how often and on which day of the week you would like your task to repeat.
> C. Select how often you would like the task to repeat on a monthly basis.
> D. If you know the date you would like to stop the repeated task check **Stop Repeat** and enter the appropriate date.

Note: The next Repeat task is only generated when you complete or delete the task that is currently pending.

Alert Tab

UVC allows you the option to be alerted using different ways at the time and date of your choosing. To set-up an alert for your task click the **Alert** tab and fill out the appropriate fie*lds.*

Date

This is the date and time that the task will be sent. If this is a repeat task you only need to put the date and time of the initial alert and UVC will generate the repeat alerts automatically based on the difference between the repeat date and the alert date.

Email

If you want your alert to be sent via email then tick off this box and enter the email address(es) you want this alert to be sent to.
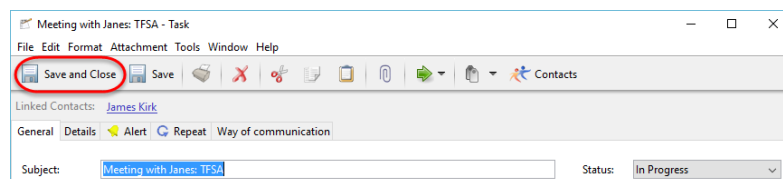
Mobile

If you want your alert to be sent to your cell phone then tick off this box and enter your mobile phone notification email address(es). Please check with your mobile provider to see if this option is available for you.

UVC Instant Message

If you want your alert to be sent using a UVC instant message then just tick off this checkbox.

Warning: Alerts will only be sent if they are at least 15 minutes into the future.

After entering the appropriate information you can now add the task into the database. You can do this by clicking on **Save and Close** or using the Enter key on the keyboard.

To Find a Task

Tasks will not be shown on the Active Task list if they have a status of completed or cancelled. They will also not appear if the start-date of the task is in the future. To be able to find the task you want you must use the search criteria effectively. To be able to find the tasks you want effectively please keep the following points in mind:

1. If you cannot find a task you are looking for make sure that you have your current view (area B below) on all tasks.

2. Try selecting both short and long term tasks (area C).

3. Make sure the correct folder is selected (area E). If you do not know which folder the task you are looking for is located in simply select all the folders.

4. Make sure you have the correct user selected (area D).

   Once you have broadened your search range by doing all these things you can try to enter the subject of the task in the find field (area F) or scroll through the list of tasks to find the one you want.

Navigating the Task module

A
This is a drop down menu that allows you to switch between your task list and the task lists of others who have given you access.

B
This area allows you to select which tasks you would like to view based on status and due date. Active tasks will show tasks that have a start date that is today's date or previous and have not been completed. Once you have completed a task you must select All Tasks to be able to see it.

C
You are able to view only short term tasks, long term tasks or both.

D
This area allows you to view tasks for other users that have given you access by placing a checkmark beside their name. You are able to view more than one users tasks at once.

E
This area shows the task folders that are available for the users (D) you have selected. You are able to view one folders tasks at a time or multiple folders.

F
The find area allows you to search for tasks. This find field will search for any data that was entered on the task information sheet such as subject, notes, etc.

G
This area shows the column headers which can be customized to you preference. To customize them simply right click anywhere on a column header. To sort the column click on the header once, to reverse sort click on it twice.

H
The tasks that you are currently viewing or that you have searched for will be listed in this area.
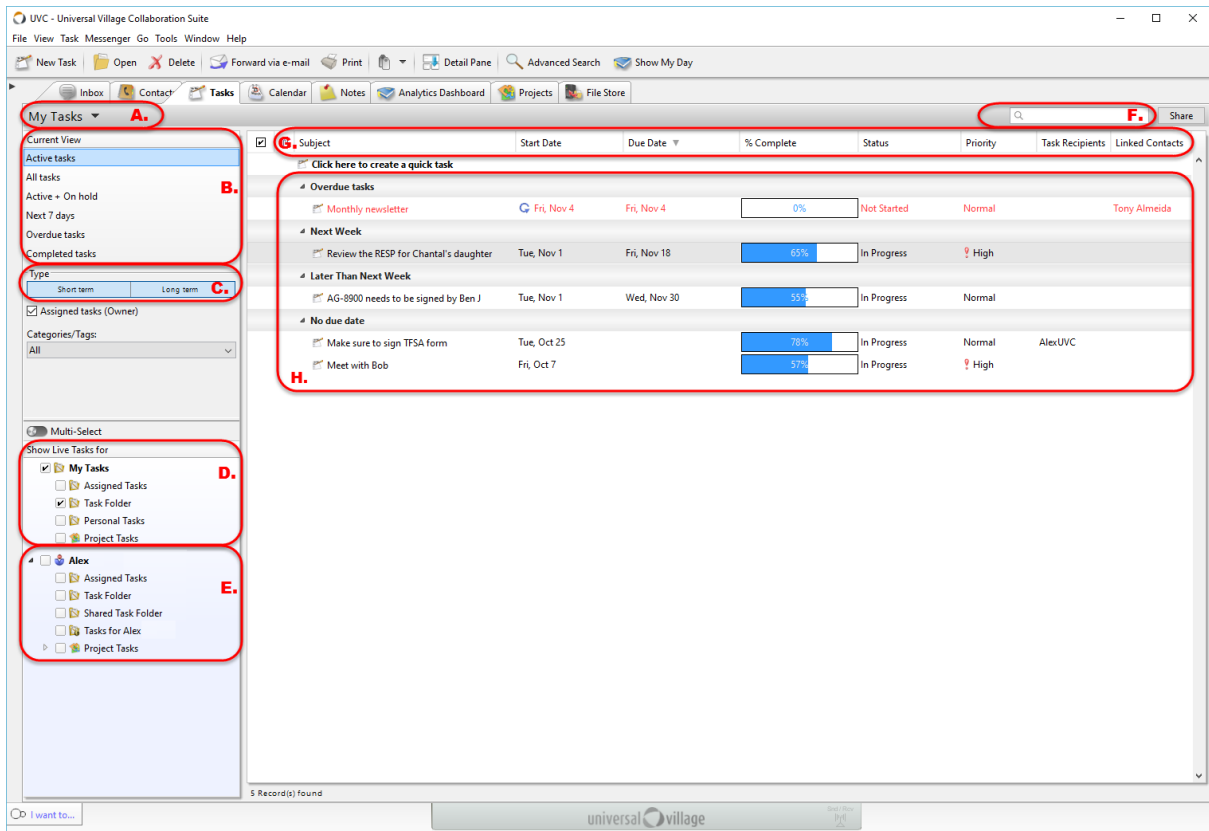
Completing/Cancelling or Putting a Task on Hold

To complete a task, cancel a task, or put a task on hold, use the following steps:

1. Locate the task you would like to edit.
2. Double click on the task.
3. Change the status of the task to what you would like.
4. Click on **Save and Close** or use the **Enter** key on the keyboard to close the task box.

   Note: If you have completed or cancelled the task you will no longer be able to see it under Active Tasks. To view the task make sure you select All Tasks on the left of the screen.
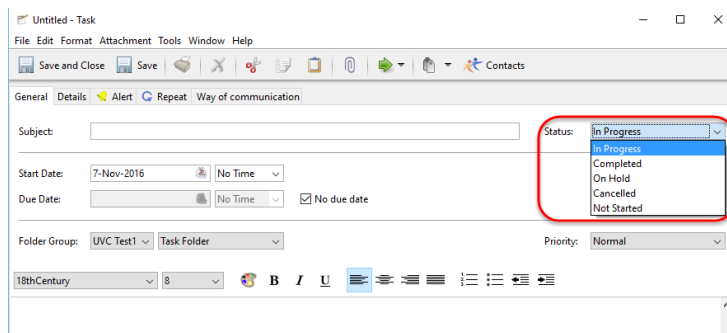
To Delete a Task

To delete an existing task use the following steps:

1. Locate the task you would like to delete.
2. Right click on the task and then select Delete Task from the menu. You should then get a warning asking if you are sure you would like to delete the task.
3. Click on Yes to confirm delete.
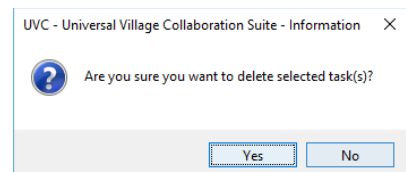
   Warning: Please exercise caution when deleting tasks. The action cannot be reversed.

To Change a Short Term Task to a Long Term Task or Vice Versa

To move a task that is in the short-term area to the long-term area use the following steps:

1. Locate the task you would like to change and double click on it.
2. Click on the **Details** tab.
3. At the bottom of the window it says **File Under > Short Term > Long Term**. Select the appropriate option.
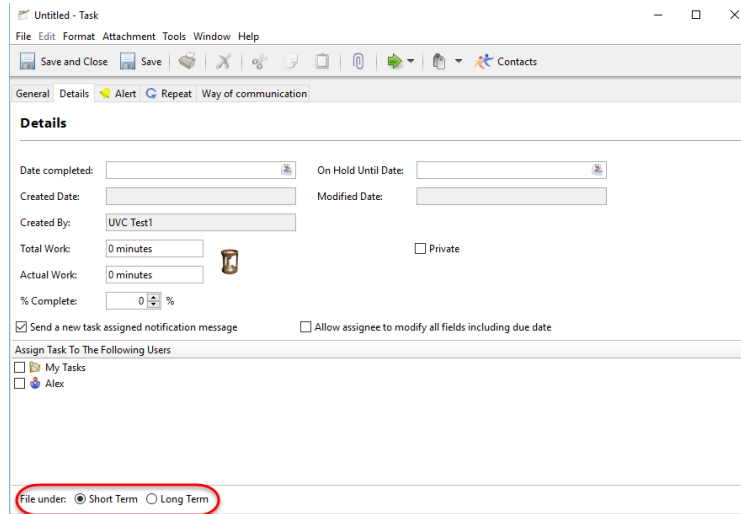

4. Click on **Save and Close**.

Column Headings

You are able to customize your column headings in the task module by removing columns, adding columns and changing the order of columns. You are also able to sort ascending and descending by each column.

To Add or Remove Columns

To add or remove columns to your screen please use the following steps:

1. Right click on the column headers.

2. Place a checkmark beside columns you would like to show and remove the checkmark from columns you would not like to show.
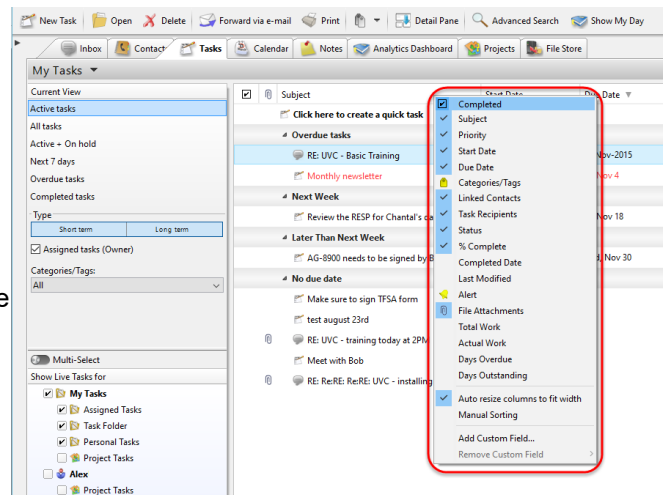
To Move Columns

To move your columns so they are in a different order use the following steps:
1. Left click and hold on the column you would like to move.
2. Drag the column to its new location.
3. Release the mouse.

Column Sorting

To sort your columns ascending or descending use the following steps:
1. Click once on the column header you would like to sort by.
2. Click again on the same column header to sort the data in reverse order.

Group By

In the task list UVC allows you to group your tasks by different criteria for display and printing purposes.

To group your tasks use the following steps.

1. Right click anywhere in the Task module.
2. Select **Group By** from the menu.
3. Select which option you would like to group your contacts by:
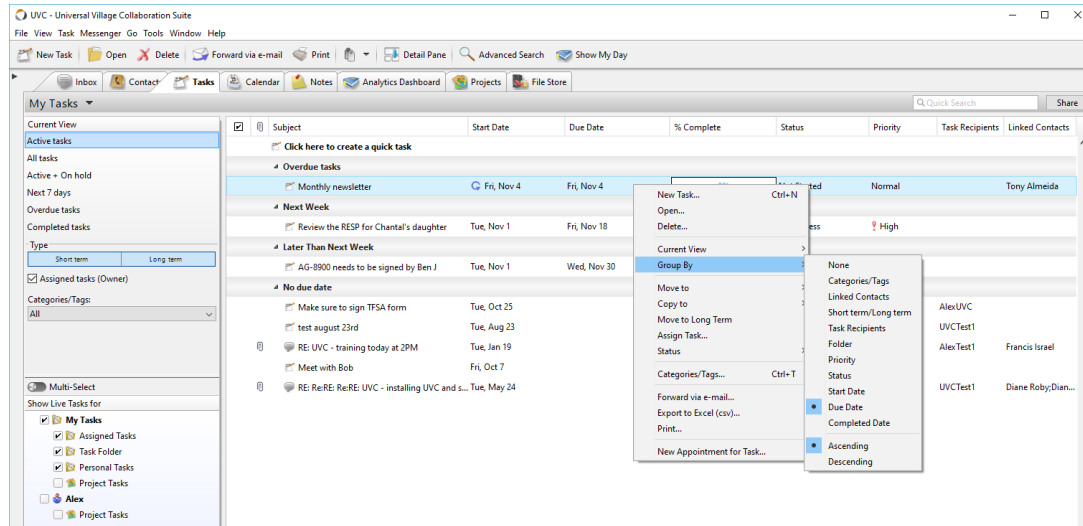
None
No grouping.

Categories
This will separate your tasks by the customized categories that you have assigned to them. Using this function will allow you to group your tasks any way you want.

Linked Contacts
This will group your tasks by the Address Book contacts that the tasks have been assigned to.

Short Term/Long Term
This will group your tasks by short term and long term tasks.

Task Recipients
This will group your tasks by people that the tasks have been assigned to.

Folder
This will group your tasks by the folders that they have been assigned to.
Your tasks will now be grouped according to what you have selected. Please note that for the grouping to be effective you must have some tasks already on the screen in order for them to be grouped. If you do not you will have to search for tasks and then group them.

Forward Via Email

You are able to forward a task by email directly from UVC to any contacts that you have an email address for. To do this you must have your email application already setup and configured. You are able to send the task to multiple recipients and use Cc and Bcc functions. To email a task to a contact please use the following steps:

1. Find the task that you would like to email.
2. Right click on the task and select **Forward Via Email** from the menu.
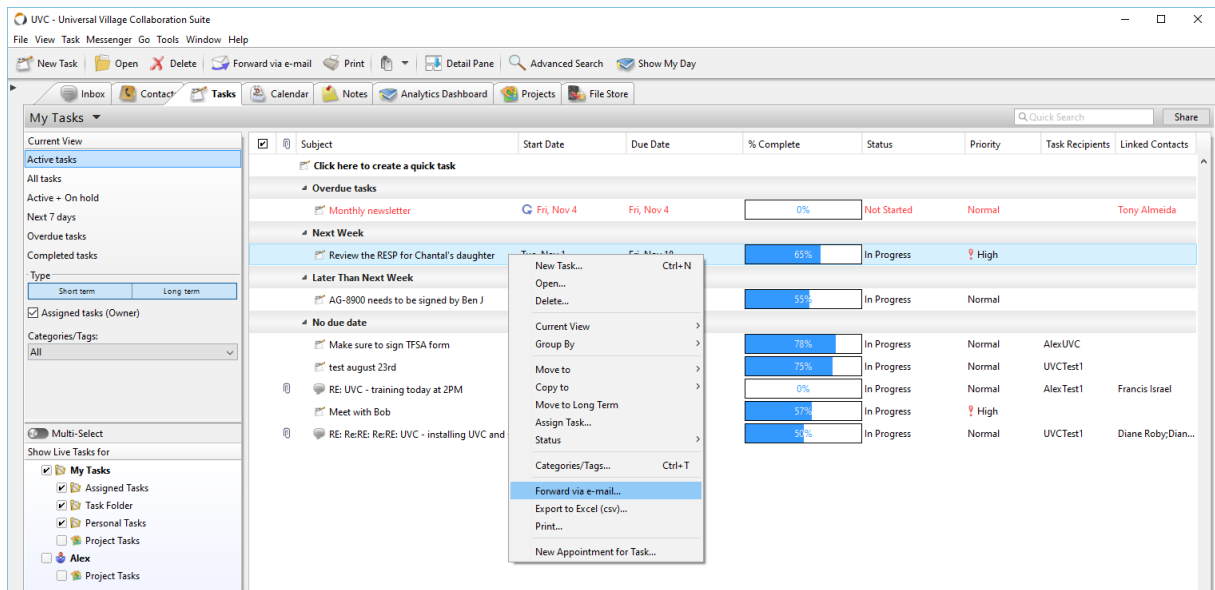
3. A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to send the task to by placing a checkmark in the box beside their name and clicking on the **To>** button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to send the task to by placing a checkmark beside them and clicking on the **To<** button in the middle to move them back to the box on the left. You are able to do the same thing for contacts that you wish to cc and bcc. Simply use the **Cc>** and **Bcc>** buttons. If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by personal or business contacts and by groups.

4. Once you have moved the contacts to the boxes on the right that you would like to send your task to simply click on **OK**. Your Email application will now be launched and the task information will be on the email as well as all the addresses you selected.. You will also be able to write a message on the email. Once this is done simply send the email.

    Note: If you wish to send a task as an email to someone who is not in your address book simply leave the To box blank and enter the persons email address when your email program is launched.

    Note: If a window does not open allowing you to compose an email, your browser is not configured to send emails. To continue, configure your browser and repeat these steps.
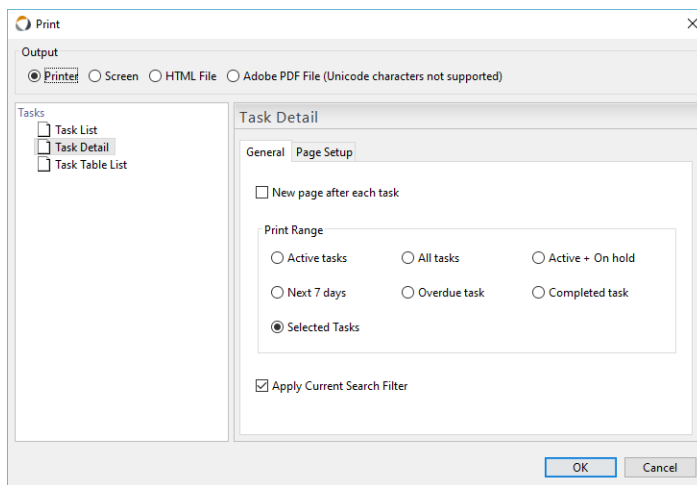
Print

You are able to print 3 reports from the Task Module. The Task List report, the Task Detail Report and the Task Table List. To print the reports use the following steps:

1. Right click anywhere in the Task module.
2. Select **Print** from the menu.
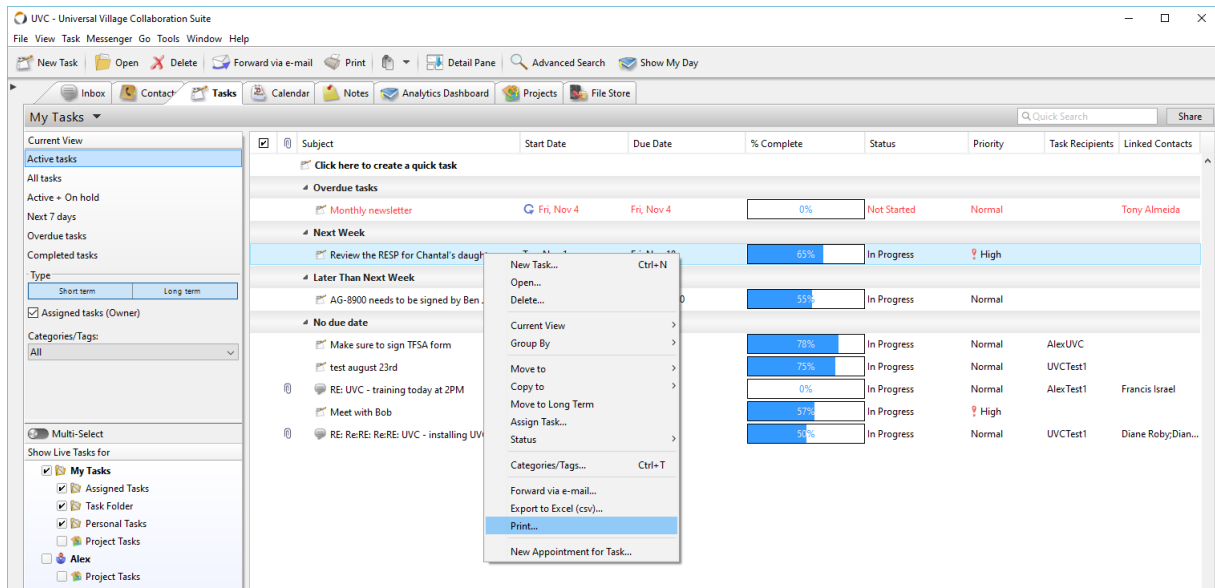
3. The available reports will be listed on the left hand side of the screen. Select the report you wish to print.

4. Once you select your report you will have various options available on the right hand side of the screen. Select the options you would like. The Task List report and the Task Table List report will print a report that shows exactly as you have your screen laid out with the tasks you have searched for, the layout of the columns and the sorting of the columns. If you want to use this report it is best to layout your screen they way you would like it to show before you go into the print menu.

Selected Tasks

This will include only the tasks that you have selected. To select tasks click on the task, to select multiple tasks use the Ctrl key.

5. Select the type of Output you would like to use from the top of the screen. You are able to choose **Screen**-shows you a print preview, **Printer**-prints to paper, **HTML File**-creates and HTML file or **Adobe PDF**-creates a PDF file.

6. Click on **OK**.