UCS Task Lists Quick Start Guide

UCS Tasks Lists
UCS allows users to create multiple Task Lists that can be customized and grouped as needed. All Task Lists will be displayed in the Overview pane.

Create a New Task List
Create a New Task List Using the Toolbar
1. Select the drop-down arrow to the right of the New Task button on the toolbar.
2. Select Task Folder from the drop-down menu.
3. Enter the name of the Task List in the Name: field.
4. Select a color from the Color drop-down menu.
5. If you want to synchronize the Task List to a remote service (e.g. iCal) check the box and enter the URL.
6. Click the OK button.

Create a New Task List Using the Overview Pane
1. Click the Options button (Gear icon) to the right of the Tasks heading in the Overview pane.
2. Select New Task List from the drop-down menu.
3. Enter the name of the Task List in the Name: field.
4. Select a color from the Color drop-down menu.
5. If you want to synchronize the Task List to a remote service (e.g. iCal) check the box and enter the URL.
6. Click the OK button.

Group Task Lists
Task Lists can be grouped for organization and easy sharing. All Task Lists, including the high level group, must be created prior to grouping.
1. Left-click and hold your mouse over the Task List to be moved into a group.
2. Drag the Task List on top of the high level group.
3. Release the mouse button.

NOTE: The high level group will now include a grey arrow to the left that will allow it to be expanded or collapsed in order to show or hide the tasks it contains. These options are also available to group sub folders.

Print a Task List or Task
Print an Entire Task List
1. Select the Task List to be printed.
2. Click the Print button in the toolbar.
3. Select Print Task Folder.
4. Select the printer and location.

5. Click the OK button.

Print an Individual Task
1. Select the Task to be printed.
2. Click the Print button in the toolbar.
3. Select Print Selected Task(s).
4. Select the printer and location.
5. Click the OK button.

Share a Task List
Sharing allows others to have access to Tasks that currently reside within a single account.
1. Select the drop-down arrow next to the Task List to be shared.
2. Select Share Task List from the drop-down menu.
3. Select the radio button appropriate to the user who will be given access to your list.
   - Internal to UCS: can have all access levels
   - External to UCS: can have read-only access
   - Public (Outside PSU): can have read-only access
4. Enter the email addresses of the recipients.
5. Click the radio button for the appropriate role.
6. Click the Send Standard Message button to adjust the message as needed.
7. Click the OK button.

NOTE: By default, users receive an email notification when they have been granted access to another user’s Task List. The email will include the option to accept or decline the share.

Create a New Task
Create a Task Using the Toolbar
1. Click the New Task button in the toolbar.
2. Enter a brief description of the Task in the required Subject field.
3. Enter the Location of the Task, if needed.
4. Select the Priority of the Task. The default is Normal.
Create a Task Using the Toolbar (continued)

5. Select the Task List where the Task should be displayed from the drop-down menu.
6. Select the Status of this Task from the Status drop-down menu.
7. Select a preset Percentage Completed for this Task or enter another number, if needed.
8. Enter the Start Date and Due Date manually or utilize the mini-calendar found in the drop-down arrows to the right of each field.
9. Set a reminder by checking the box and selecting a date and time. You can also configure an email notification using the configure link.
10. Type any notes related to this Task in the Body section located at the bottom.

You have additional options including:
- Add Attachment: clicking the paperclip icon in the toolbar will allow you to add an attachment.
- Spell Check: clicking the Spell Check button will to check the spelling of text in the body of the Task.

11. Click the Save button.

Create a Task Using the QuickAdd Feature

This option creates a Task with only a subject and no details. However, you can edit the Task to add additional details later, if needed.
1. Select the Task List where the Task will be displayed.
2. Click the Click here to add a new task field below the toolbar.
3. Enter a brief description of the Task.

Edit Task Details

Editing task details will allow for changing and updating items such as progress and percentage of completion.
1. Select the Task to be edited.
2. Click the Edit button in the toolbar.
3. Make all necessary changes to the Task.
4. Click the Save button on the Toolbar.

Delete a Task

1. Select the Task List to be deleted.
2. Click the Delete button in the toolbar.

Filter Tasks by Status

1. Select the Task List to be filtered.
2. Click the View button in the toolbar.
3. Select the status to be viewed from the drop-down list.

NOTE: To return to the full, unfiltered view, select All from the drop-down menu.

Move a Task Between Task Lists

Once you’ve created a Task, it can be moved to a different Task List, if needed. You can move a Task using two different methods.

Move a Task Using the Move Option
1. Select the Task to be moved.
2. Click the Move button on the toolbar.
3. Select the Task List where the Task should be displayed.

Move a Task Using the Drag and Drop Method
1. Select and hold your left mouse button on the Task that should be moved.
2. Drag the Task over the top of the Task List in the Overview pane. The border around the moving task will change to green when it is in an area where the task can be dropped.
3. Release the mouse button to drop the Task into the Task List.

Sort a Task List

As your Task List grows, you may wish to sort the list by any number of fields. The process for sorting your Task List is dependent upon how you have chosen to display the Reading Pane.

Sort with a “Bottom” Reading Pane or None
1. Open the Task List containing the Tasks to be sorted.
2. Click any of the following column headers to sort the Tasks by that column’s contents:
   - Subject
   - Status
   - % Complete
   - Due Date

Sort with a “Right” Reading Pane

1. Open the Task List containing the tasks to be sorted.
2. Right-click the Sorted by Date header.
3. Select any of the fields listed in the previous section to sort the Tasks by.