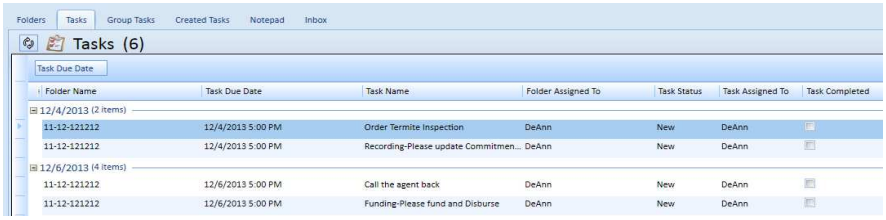
Tasks, Templates, and Task Lists

Have you ever missed a deadline or opportunity because the sticky note glue gave out and the sticky note ended up on the floor?

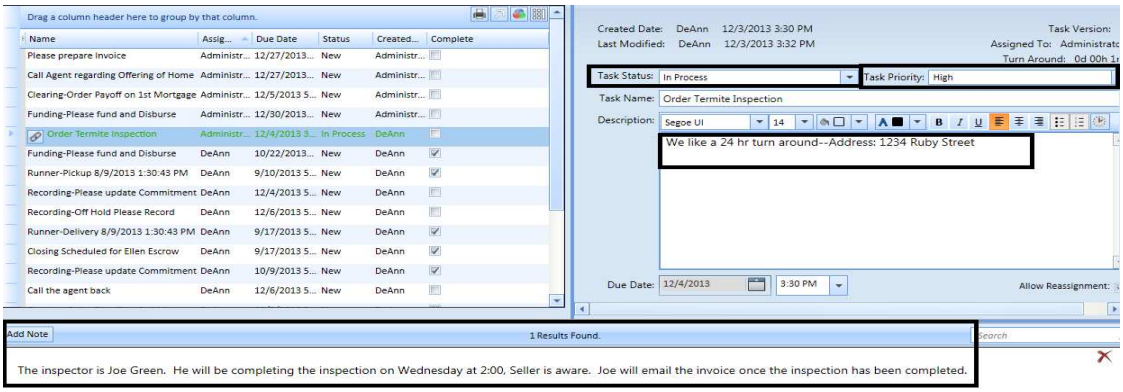
Keeping track of your to-do items, docket, order of the day, agenda, lineup or whatever you call your busy schedule, can be easily managed by using GreenFolders tasks. Creating a task directly from the folder, either for you, or other GreenFolders users or groups is quick and easy. The Home Screen provides one location to view tasks to keep you informed and on track!

Viewing Tasks

There are two different tabs on the Home Screen labeled Tasks and Group Tasks. The Tasks tab displays a list of all tasks, assigned to you, that are not completed. The Group Tasks tab displays a list of all tasks, assigned to a group that you are a member of, that are not completed. To view a task, double click it or right mouse click on the task and choose Open from the menu displayed.



The corresponding folder opens and the task is displayed on the Tasks tab. The details of the task are displayed on the right hand side of the Tasks tab and any notes associated with that task are displayed at the bottom of the Tasks tab.



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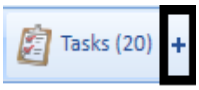
When the task has been finished, mark the checkbox in the Complete column to indicate the task has been completed. After you click "Save" to save the changes to the folder, the task is removed from your home screen, and an email notification will be sent to the user who assigned you the task. Once removed from your Tasks or Group Tasks tab on the home screen, the task remains in the folder for future reference.

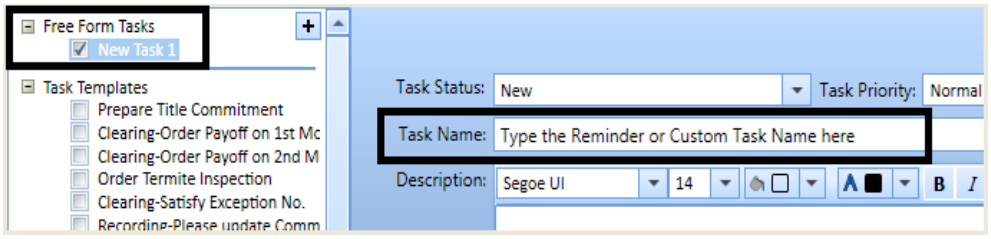
Creating Tasks

To create a task, open a folder and click the "+" next to the Tasks tab. The Create Tasks window is displayed.

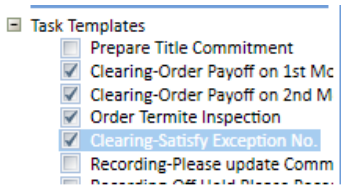


Free Form Tasks

Create one or more tasks on the fly! Type in a Task Name, set the Status and Priority, etc. When you are finished setting up the task, click Create. You can add additional Free Form Tasks at any time by clicking the "+" located to the right of Free Form Tasks.

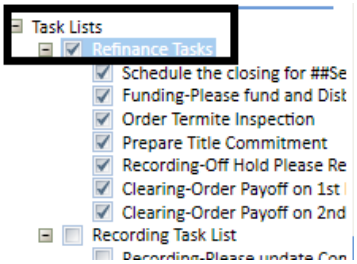


Task Templates



You can quickly add and assign common tasks to a folder by selecting one or more Task Templates. Templates, created by the GreenFolders administrator for your company, may include predefined task names, due dates, task assignees, as well as any additional instruction or details specific to each task.

Task Lists



Create multiple tasks at once by clicking on the Task List name. A Task List, also created by the GreenFolders administrator for you company, is simply a named list of one or more Task Templates. Create all Task Templates that reside beneath a Task List by selecting the entire Task Lists.

Note: You can add any combination of Free Form Tasks, Task Templates, or Task Lists.

To complete creating the new Task(s) and view on your home screen, you must click "Save" to save the change made to the folder.

For more information regarding this Leaf of Knowledge, please contact a member of the GreenFolders Support Team at 801-747-2132 or GFSupport@GreenFolders.com.

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