



## MARK5 | *Task module guide*

## 0.0 | *Welcome*

In this guide we will help you understand and use the Task Module in MARK5. You will get to know the work area, create a task and an appointment and you will learn how to edit and delete.

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# 1.0 | Short-keys

Combine with nothing

Combine with Alt

EDITOR SHORT KEYS: Combine with Ctrl

Combine with Ctrl

Combine with Ctrl + Shift

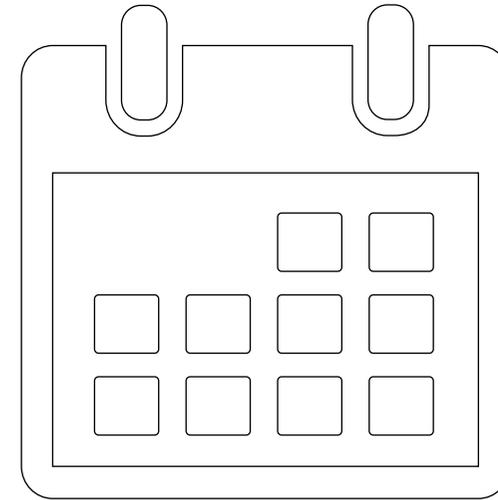
Esc	F1	F2 ADD EXTERNAL DOCUMENT CREATE NEW EMAIL	F3 SCROLL BETWEEN EMAILS	F4 SCROLL BETWEEN EMAILS	F5 EDIT/SEND DOCUMENT	F6 REPLY ALL REPLY EMAIL	F7 FORWARD EMAIL	F8 SEARCH	F9 SHOW ACTIONS	F10	F11	F12	Print Screen	Scroll Lock	Pause Break	
.	1 ASSIGN TO CATEGORY	2 ASSIGN TO CATEGORY	3 ASSIGN TO CATEGORY	4 ASSIGN TO CATEGORY	5 ASSIGN TO CATEGORY	6 ASSIGN TO CATEGORY	7 ASSIGN TO CATEGORY	8 ASSIGN TO CATEGORY	9 ASSIGN TO CATEGORY	0 QUICK EDIT FILTER	-	=	\	Insert	Home VIEW LATEST RECEIVED DOCUMENT	Page Up JUMP BETWEEN DOCUMENTS
Tab ↹	Q FILE TO FOLDER	W COPY TO PERSONAL WORKTRAY	E CENTER	R ACCESS RIGHTS ALIGN LEFT	T EDIT TEMPLATE INSERT TEMPLATE	Y COPY TO USER WORKTRAY	U UNDERLINE	I INTERNAL MESSAGE ITALIC	O ADD COMMENT OPEN FILE	P PRINT	{ [	} ]	Enter ↵ SEND EMAIL	Delete	End VIEW FIRST RECEIVED DOCUMENT	Page Down JUMP BETWEEN DOCUMENTS
Caps Lock	A SELECT ALL	S SEARCH FOR FOLDER DOCUMENT TRANSMIT STATUS SAVE	D	F FIND WORD	G	H REPLACE	J	K	L ALIGN LEFT	:	"					
Shift	Z UNDO	X CUT	C OPEN CATEGORY WINDOW COPY	V PASTE	B BOLD	N	M NEW INTERNAL MESSAGE	<	>	?	Shift	Turbo			↑ SCROLL WITHIN EMAIL MOVE FOLDER UP	
Ctrl		Alt	MARK DOCUMENT AS READ				Alt			Ctrl			←	↓ SCROLL WITHIN EMAIL MOVE FOLDER DOWN		→

## 2.0 | *Task module*

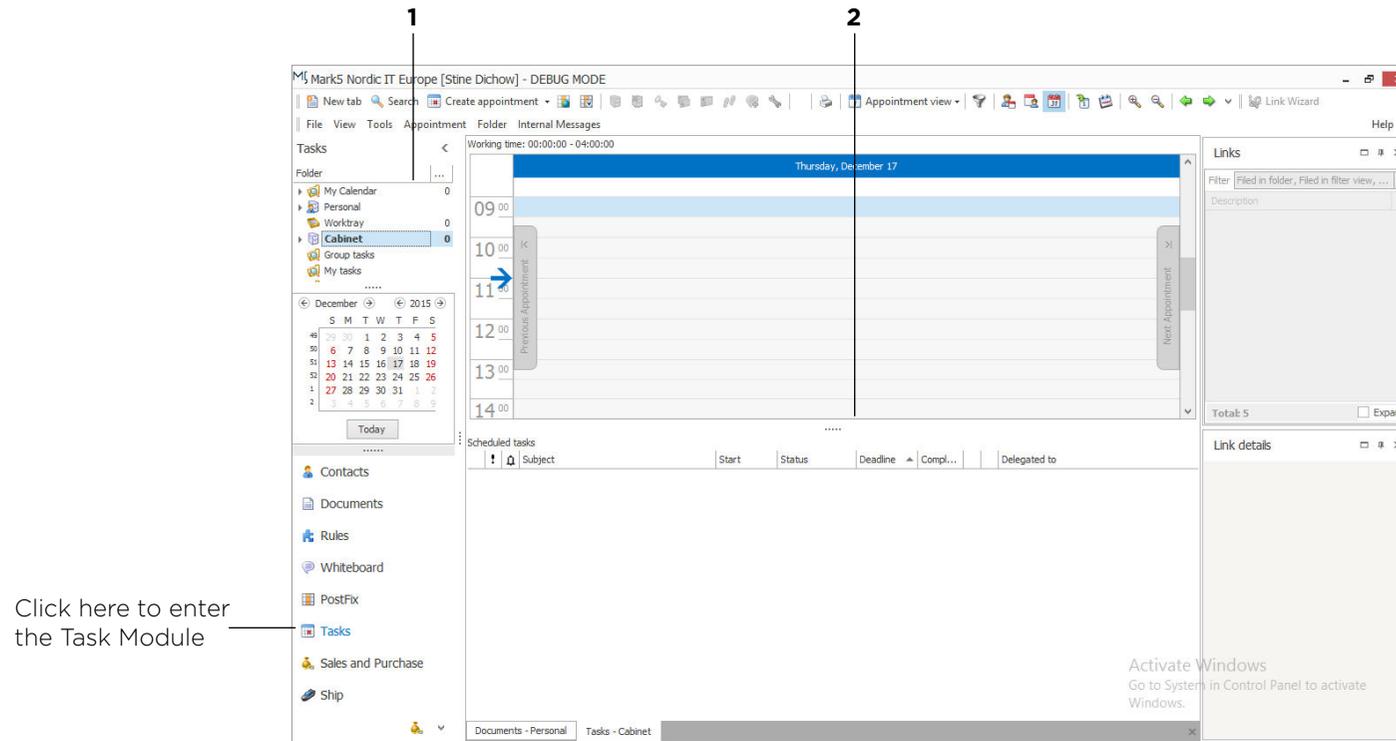
In this lesson you will get to know the **Task module** in MARK5. The task module serves **two purposes**:

**1** | It is your regular **calendar** where you can **create appointments**.

**2** | It keeps track of your **daily tasks**. In the module you can manage your daily activities by creating **tasks** and **appointments**. You can use the module individually or you can **assign tasks** to **emails, contacts** or **other objects** in the system. Tasks can be either **personal** or **delegated** to others so the company can benefit from an improved transparency of its employees, department or organisational activities. To understand the module, we will first go through the **task work area**, and then learn how to create first **tasks** and then **appointments**.



## 2.1 | Task work area



Let us start by having a look at the [task work area](#). To access the module choose [task](#) from the lower left side of the screen.

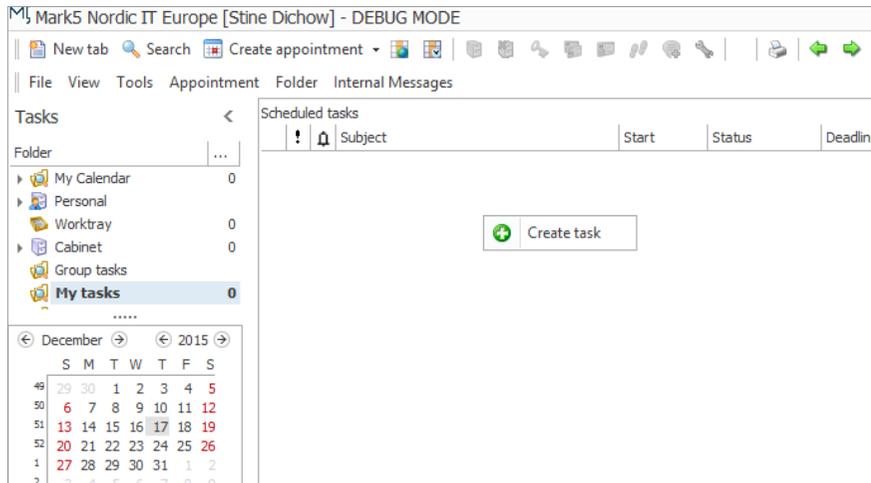
This will change your screen to the [task work area](#) as viewed above. Lets quickly go through how you navigate in the module.

**1** | Navigate between [calendar](#) and [task folders](#). Here you choose [calendar](#), [cabinet](#), [task](#) and more specified folders. Choose [my calendar](#) to view your [calendar](#) with assignments, [cabinet](#) to view a preview of both calendar and tasks and [my tasks](#) to view tasks. The centre of your screen will change as you switch between folders.

**2** | Views the [content](#) of the chosen [folder](#).

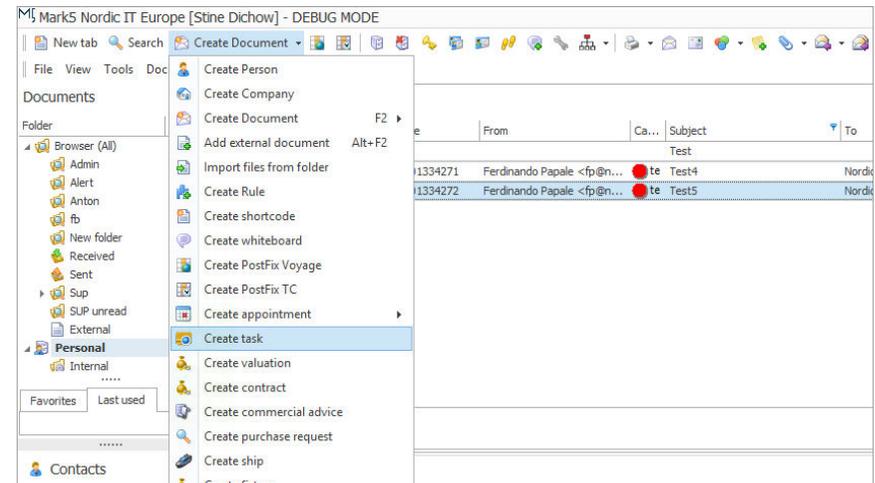
**NOTE** | You can also view the [task module](#) within other modules of MARK5. Just press **F12** and a preview of the task panel pops up for easy access.

## 2.2 | Create task



Now, let's learn to [create a task](#). A task can be a [project](#) or an [assignment](#) that you need visible in the system. Tasks are preferable, if you wish to log an on-going project or daily assignments.

When you are in the task module you view tasks by choosing my tasks from the folder view in the left side of the screen. Here you can also [create task](#), just right click directly on the screen and choose [create task](#).



No matter which module you are in, you can always create a task from the [menu](#) by choosing the drop down beside create. Just scroll down and choose [create task](#).

Either way, this will open your [create task window](#), similar to the screenshot on the next page.

## 2.2 | Create task

The screenshot shows a 'Task' dialog box with the following fields and options:

- Organizer:** sd
- Status:** Not started,  Active, Completed, Waiting, Postponed
- Basic event details:**
  - Subject: Task Test
  - Start Date: 17/12/2015
  - End date: 24/12/2015
  - Priority: Not defined
  - Reminder:  17:00 on 17/12/2015
  - Private:
- Additional event details:**
  - Delegate to: sd;
  - Delegation: No delegation
  - Percent completed: 10 %
- Description** and **Links** tabs
- Buttons:** Ok, Cancel

Above we have the [task window](#). Here, go through the following steps:

- 1** | In [subject](#) you name the task.
- 2** | Set [start and end date](#). You can also choose if and when you want a [reminder](#) and if the task should be [private](#) and only show on your screen.

- 3** | In [delegate](#), choose which user you want to [delegate the task to](#). Below you see [percentage completed](#) where you can set how close the task is to be completed. You can adjust continuously. Under [description](#), you can add further details to the task. When you are done, press [ok](#).

## 2.3 | Create appointment

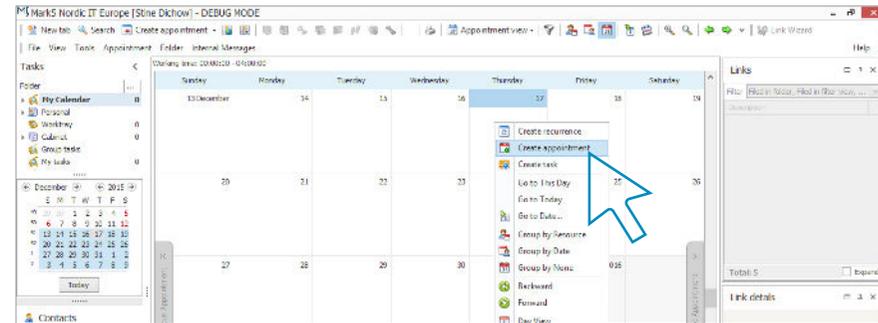
You can view [appointments](#) from the [calendar](#). Appointments are preferable in relation to daily activities. When you [create an appointment](#) the process is similar to a [task](#): Follow the same instructions as we just learned to [create task](#) (page 06). Just choose [appointment](#) instead of [task](#).

Also, from the [task module](#), you can go to [my calendar](#) and right click on the [calendar preview](#) to [create appointment](#)

Choose [appointment](#) and a new window opens, similar to screenshot 2.

Compared to a task, an [appointment](#) allows you to [add other users](#) as well as [invite clients](#) to the appointment. Click on [Participants](#) and click on [Send Invitation](#). Choose what kind of participant you wish to invite. A small window appears, that tells you to [save the appointment](#) before you can send invitations. Click [ok](#), and you will be able to [select users](#).

1.



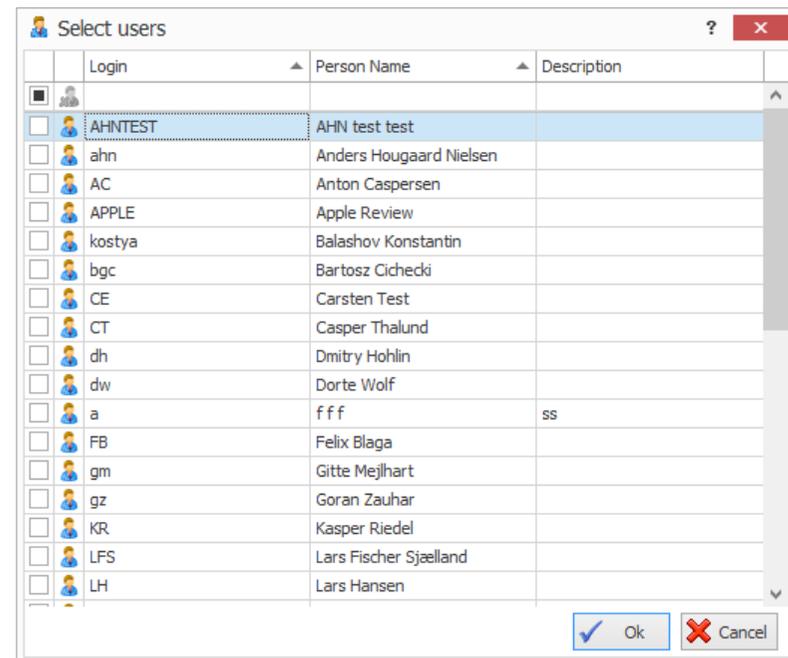
2.

## 2.3 | *Create appointment*

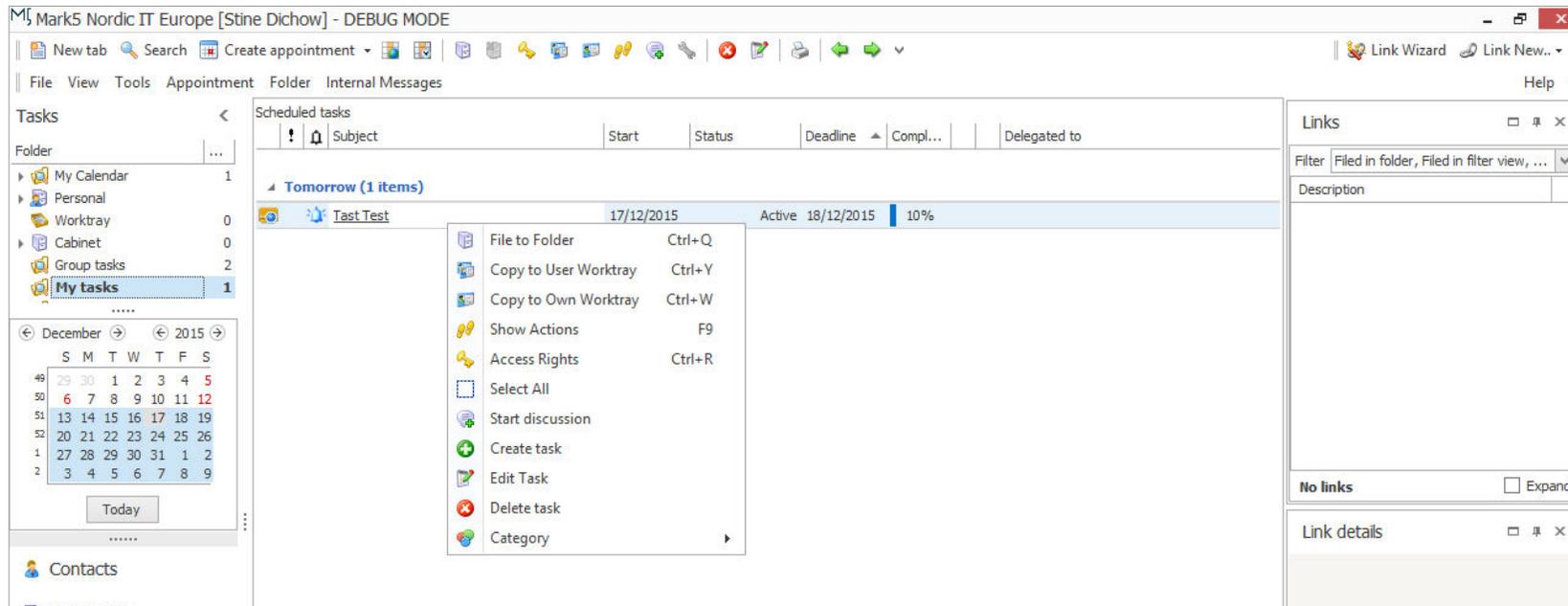
Above you see the **select users window**. Here, you can **add other users**. When you finish, click **ok**. You will now return to the **create appointment window**, where you finish by clicking **ok**.

**NOTE** | You can add from all contacts. If you click **invite clients** instead of add you will be able to choose freely from all **contacts**.

**NOTE** | You can **search** through users in the top column.



## 2.4 | Edit and delete



If you wish to [add](#), [edit](#) or [delete appointments](#) or [tasks](#), you can always just [mark them](#), and [right click](#). This opens your [options](#). As the picture shows, you can [file](#), [show actions](#), [edit access rights](#), [create](#), [edit](#) and [delete task](#). You can do the same with [appointments](#).

**EXERCISE** | Create a task and delegate the task to a colleague. Create an appointment and add at least two other users to the appointment.