

## Tasks and the Whiteboard-Adding Tasks to the Task Calendar and Repeating Tasks

The Task Codes you have created are all on the right hand side of the Calendar itself.

Task Codes are dragged and dropped on to the Calendar to days with no colour. There are a number of ways to use the icons:

### 1. Simple Drag and Drop

Drop on to the days necessary.

The screenshot shows a task calendar for the period Aug 22, 2016 - Aug 28, 2016. The interface includes a 'Complete' dropdown set to 'No', a 'Filter Users' field with 'all' selected, and navigation buttons for 'today', 'repeat', and 'unassigned (1)'. A task card for 'From phone' is visible on the left. The calendar grid shows three employees: Bill Fletcher (Administrator), David Maxwell (Farm Assistant), and Eric Clapton (Milk Harvester). Bill Fletcher has a blue 'Not Working' block on Tue 22/8 and Wed 23/8, and a green 'Cows in' icon on Wed 23/8. David Maxwell has a blue 'Not Working' block on Wed 23/8 and Thu 24/8, and a green 'Cows in' icon on Thu 24/8. Eric Clapton has a blue 'Not Working' block on Thu 24/8 and Fri 25/8, and a green 'Cows in' icon on Fri 25/8. On the right, a 'Tasks' panel lists various task codes with color-coded icons: AM Milking (orange), Cows in (green), Cows In (move break) (black), From phone (green), GEN (red), HT (purple), meeting (green), PW (black), and tractor service (yellow). A 'Key' section below lists: Working (white), Not Working (blue), Annual Leave (grey), and Sick Leave (green). A green callout bubble points to the 'Task Codes' panel with the text 'Task Codes'.

### 2. Drag and Drop then add directions/ notes

Drag and Drop an icon on to the Calendar

This screenshot is identical to the one above, but with a red 'GEN' task code icon now placed on the calendar cell for Bill Fletcher on Wednesday, 23/8. A green callout bubble points to this icon with the text 'Icon dragged and dropped'.

Then click on the icon which will bring up the box below

Code : GEN - GENERAL TASK

User : Bill Fletcher

Date : Aug 24 2016


Number of consecutive days to be repeated : - 1 + days

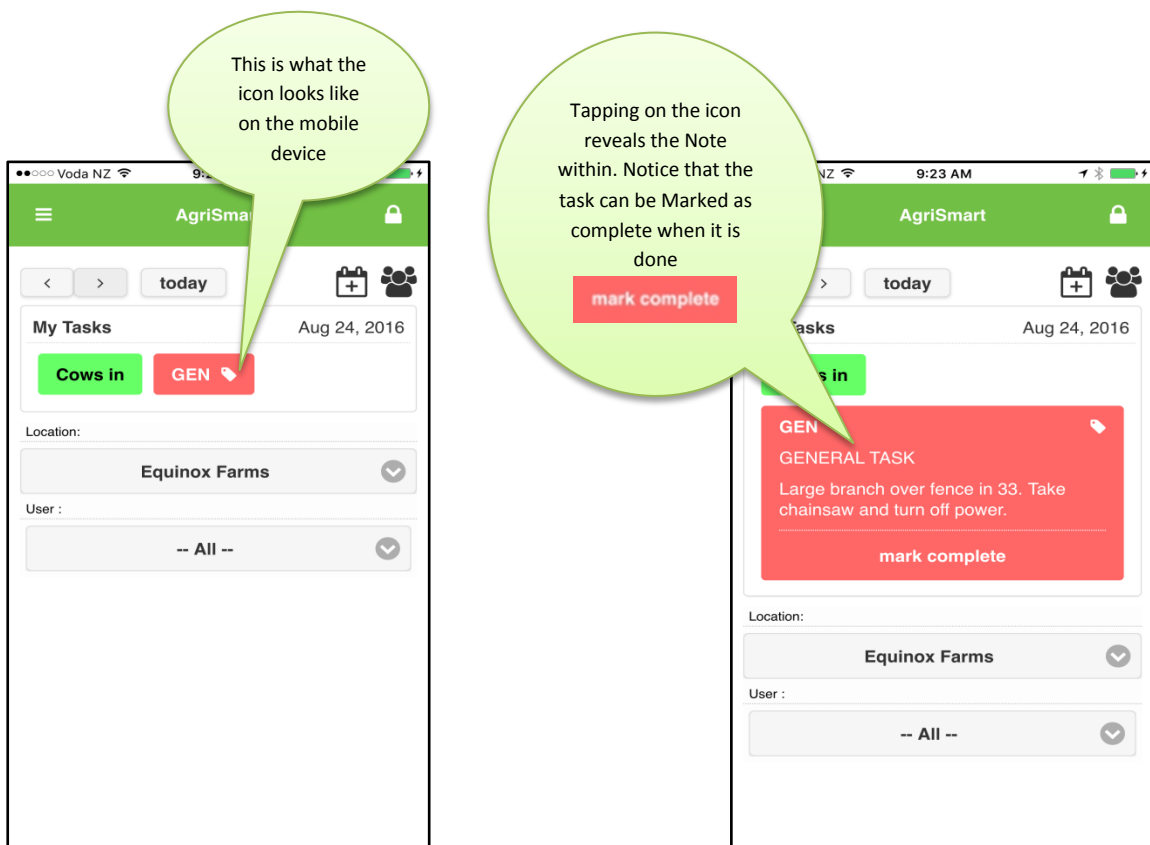
At the following intervals : - never + days

Notes :

Complete :

delete save >>

When notes have been added and saved  will have a pencil added. This means that there are notes within the task.



### 3. Repeating Tasks.

Some Tasks need to be repeated on a certain time cycle like Tractor servicing

Employee	Mon	Tue	Wed	24/8	Thu	25/8	Fri	26/8	Sat	27/8	Sun	28/8
Bill Fletcher Administrator () Equinox Farms				Tractor service icon								
David Maxwell Farm Assistant Equinox Farms	tractor service					Cows in			Cows in			
Eric Clapton Milk Harvester Equinox Farms							Cows in					Cows in

Drag and drop the icon on to the first date of the cycle and then click on the icon which will bring up the screen shot below:

**Edit Task**

Code: Tractor

User: Bill Fletcher

Date: Aug 22 2017

Number of consecutive days to be repeated: - 1 + days

At the following intervals: - 1 + weeks

Notes:  
 1/ Remove Air Filter and clean  
 2/ Check for Bird nests  
 3/ Grease nipples  
 4/ Check water level in radiator  
 5/ Check Oil level and colour of oil  
 Complete service book, don't forget Oil to be changed every 100 hours and water reservoir needs to be monitored regularly.

Complete:

delete save >>

How many repeats per day? This is normally set to 1

How often? This is set to weekly....so Task will show up once a week.

Other examples:

- 1 + days

- 2 + weeks

Once every 2 weeks.

- 1 + days

- 2 + days

Once every 2 days

There are a couple of little tricks with the Task Repeater:

1/ Once you have set the repeat cycle as illustrated above, click the save button and then click the repeat button to view instantly. If you don't click the repeat button your cycle will happen overnight anyhow.

< > today repeat unassigned (1) Aug 15, 2016 - Aug 21, 2016

From phone  
 Test  
 added by Bill Fletcher on Aug 18 2016

Employee	Mon	15/8	Tue	16/8	Wed	17/8	Thu	18/8	Fri	19/8	Sat	20/8	Sun	21/8
Bill Fletcher Administrator ( ) Equinox Farms									Tractor Service					Tractor Service
David Maxwell Farm Assistant Equinox Farms														
Eric Clapton Milk Harvester Equinox Farms														

**Tasks**  
 AM Milking Cows in  
 Cows in (move break) DC  
 From phone GEN R1  
 meeting PW  
 Tractor Service

**Key**  
 Working  
 Not Working  
 Annual Leave  
 Sick Leave

Repeat button

2/ The repeat cycle only populates visually on to the Task Calendar for 1 month ahead. The reason for this is that should you have to delete the entire Task and all the repeats, it only has to be done for a month.