

Advance Web

Working with Tasks



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Tasks Overview

The Tasks application in Advance is used to record “ticklers” or follow-up reminders for an entity. For instance, after visiting a prospect and writing a Contact Report (ROC), you may have several things that need to be accomplished either by yourself or others. Tasks can be reminders for such things as:

- Sending a letter or email correspondence
- Calling a prospect on a specific date
- Inviting a person to a future event
- Making a visit to a donor

Tasks can either be assigned to the user creating the task as a personal reminder, or they can be assigned to other users for their follow-up and completion.

The Tasks application is a master/detail form in Advance Web – the top section of the form displays a master table of tasks associated with the entity (which can be sorted by the table column headers), and the detail section below the table displays specific information about a task selected in the table.

Entity Task Actions Close

Mr. John Benedict #376754
Rec Type Grad Alum (2009 Clg of Nursing & Health Prof)
Degree MHS 2009 Clg of Nursing & Health Prof
Prim Affil

Tasks (1/1) Save New Actions Help

Task	Status	Scheduled	Completed	Responsible
Telephone Call	Pending	Sep 30, 2009		Mr. Michael Andrus #367594

Task* TEL Telephone Call **Scheduled** 09/30/2009
Status* P Pending **Completed**
Priority M Medium **Original**
Description* Please give John a call and discuss his giving options with the University.
Contact Rpt
 Strategy **Recur Month**
Frequency **Recur Week**
Purpose **Recur Day**
Source

This document covers the basic procedures related to the Tasks application. These procedures have been documented using Advance Web 9.2 on a PC using the Internet Explorer web browser.

Creating a Task for an Entity

The first step in working with Tasks is to create a task and assign it to either yourself or another user. The **Tasks** application in Advance only requires three basic pieces of information, however, the user can fill out whatever fields fit their needs.



Procedure:

1. Perform a lookup to display the **Entity Overview** of the entity for which you want to create a task.
2. In the page tree (the left-hand pane) of the **Entity Overview**, click the **Prospect Tracking** link. The **Prospect Tracking** menu expands, and the **Prospect Tracking Summary** displays in the main window:

The screenshot displays the ADVANCEMENT web application interface. The top navigation bar includes links for Home, Go To, Lookups, Reports, Help, Close All, and Logoff. Below this, there are navigation buttons for Back, Forward, and Refresh, along with a search bar containing the text "Prospect Tracking Sum. - Mr. John Benedict #376754".

The main content area is divided into two sections. The left section, titled "Entity", contains a page tree with the following items: Overview, Detail, Biographic, Events, Giving, Membership, Prospect Tracking (expanded), Views, Alloc Stewardship, Assignments, Contacts, Contact Rpts, Cntrcts/Grnts, Demographic, Documents, Evaluations, Interests, Notes, Phil Affnties, Phil Intrsts, Stewardship, Tasks (with a count of 2), Wealth/Assets, Alerts, Messages, Entity Update, Ack Helper, Deceased Entity, Entity Merge, and View Updates. The "Prospect Tracking" menu is expanded, showing a sub-menu with "Prospect Tracking Summary" selected.

The right section, titled "Prospect Tracking Summary", displays the following information for Mr. John Benedict #376754:

- Rec Type**: Grad Alum (2009 Clg of Nursing & Health Prof)
- Degree**: MHS 2009 Clg of Nursing & Health Prof
- Prim Affil**: (blank)

Below this information, there is a section titled "Prospect Information" with a checkbox labeled "Show Inactive Prospects & Proposals" which is currently unchecked.

3. From the expanded **Prospect Tracking** menu in the page tree, click the **Tasks** link. The **Entity Task** application window displays:

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Entity Task Actions Close

Mr. John Benedict #376754
Rec Type Grad Alum (2009 Clg of Nursing & Health Prof)
Degree MHS 2009 Clg of Nursing & Health Prof
Prim Affil

Tasks (1/2) Save New Actions Help

Task	Status	Scheduled	Completed	Responsible
Telephone Call	Pending	Sep 28, 2009		Mr. Michael Andrulis #367594
Correspondence	Pending	Oct 09, 2009		Mr. Michael Andrulis #367594

Task* Telephone Call **Scheduled**
Status* Pending **Completed**
Priority Medium **Original**
Description* Please give John a call and discuss his giving options with the University.
Contact Rpt
 Strategy **Recur Month**
Frequency **Recur Week**
Purpose **Recur Day**
Source

Tasks Responsible (1/1) Actions Help

Name	Assignment	Office
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- In the **Tasks** form header, click **New**. A blank record displays in the **Tasks** detail section:

Entity Task Actions Close

Mr. John Benedict #376754
Rec Type Grad Alum (2009 Clg of Nursing & Health Prof)
Degree MHS 2009 Clg of Nursing & Health Prof
Prim Affil

Tasks (3/3) Save Actions Help

Task	Status	Scheduled	Completed	Responsible
Telephone Call	Pending	Sep 28, 2009		Mr. Michael Andrulis #367594
Correspondence	Pending	Oct 09, 2009		Mr. Michael Andrulis #367594

Task* **Scheduled**
Status* **Completed**
Priority **Original**
Description*
Responsible
Assignment **Office**
Contact Rpt
 Strategy **Recur Month**
Frequency **Recur Week**
Purpose **Recur Day**
Source

- Fill out the fields of the task according to following table:

Advance Web – Working with Tasks

Field	Description
Task (REQUIRED)	The category of action for the task.
Status (REQUIRED)	The current status of the task. For currently open and new tasks, select Pending . When setting this field to Completed , the Completed date field should also be filled out.
Priority	If needed, select a priority for the task.
Description (REQUIRED)	A detailed description of the task.
Responsible	The user that will be responsible for completing the task.
Assignment	Not currently used.
Contact Rpt	If this task is related to a Contact Report, select the Contact Report number from this list. If there are no contact reports for the entity, this list will be blank.
Strategy	Not currently used.
Frequency	If this task needs to be repeated on a regular basis, for instance, every 30 days, select that value from this list.
Purpose	Not currently used.
Source	From this list, select the user that is the originator, requestor, or source of the task. This may or may not be the user who is creating the task.
Scheduled	Use this calendar control to select a date by which the task should be completed.
Completed	When the task Status is changed to Completed , use this calendar control to select a completion date for the task.
Original	If the Scheduled date of the task changes, use this calendar control to record the original scheduled date of the task.
Office	If this task is related to another office in IA, you may optionally select that group from this list.
Recur Month/Week/Day	These numeric-only fields can be used in a variety of ways to indicate a month, week, or day on which a task should reoccur. The fields can be used together or independently, and they do not correlate to any dates selected in the calendar controls (Scheduled, Completed, Original).

- To confirm and save the task, click **Save** in the **Tasks** form header.



- The task is saved and displays in the **Tasks** table.



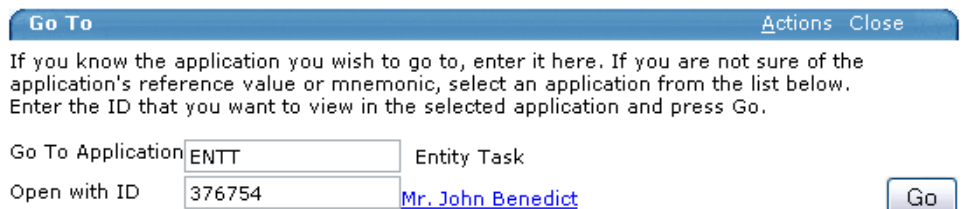
Notes:

- You must have the proper rights within Advance to create new tasks. If you do not see **New** in the **Tasks** header, you do not have the rights to create a tasks. You can, however, edit and close tasks that have been created.
- Once a task has been assigned to a user in the **Responsible** field and the task is saved, the **Responsible**, **Assignment**, and **Office** fields will no longer display on the Tasks form.
- In order to reassign the task to another user, the original task should be closed (the **Status** marked as **Completed** or **Cancelled**) and a new task should be created. See the **Tips** section of the **Updating an Existing Task** procedure later in this document.



Tip:

- If you already know the Advance ID of the entity you wish to work with, you can quickly go to the **Entity Tasks** application by selecting the **Go To** option from the Advance Web Main Menu. In the **Go To Application** field, enter either **ENTT** or **8747**, enter the Advance ID in the **Open with ID** field, and click **Go**.



Go To Actions Close

If you know the application you wish to go to, enter it here. If you are not sure of the application's reference value or mnemonic, select an application from the list below. Enter the ID that you want to view in the selected application and press Go.

Go To Application Entity Task

Open with ID [Mr. John Benedict](#)

Generating a List of Tasks

When viewing an entity record, it is easy to access and view the tasks associated with just that entity. However, if you need a list of all tasks assigned to yourself or another user that are assigned to multiple entities, you will need to generate a list or report. This procedure is not a true Advance “report” but rather is a type of Lookup in Advance.



Procedure:

1. From the Advance Web Main Menu, select **Lookups**. The **Lookups** application displays.
2. In step #1, the **Choose a template** list, select **Prospect – Tasks**. After selecting this, wait a moment while Advance refreshes the Lookup application.
3. Step #2, **Select results format**, will automatically change to **Task Lookup List**.
4. In step #3, the **Select output type** list, select **Display results**. This option MUST be changed from “Display results/Open on exact match” that comes up as the default or the search may not work properly.

5. In the **Task Lookup** section, use the comparison operators, drop-down lists, and calendar controls to define the criteria for your search.

6. Click the **Search** button to execute the search.

- Depending on the number of results in the search, Advance will either display the results that match the criteria, or it will display a warning indicating that “The number of records may delay the time to display them.” To ignore the warning and display the results anyway, click the **Continue** button.

Lookups
Actions Close

You have entered 2 criteria. Your search resulted in 245 records. The number of records may delay the time to display them. Consider selecting a different output type.

Display results/Open on exact match

New Search
Refine Search
Continue

- Depending on the number of results in the search, use the VCR controls underneath the **Lookup Results** header to navigate through the results. Advance Web will only display four records at a time.

Lookup Results
Actions Close

Items to 4 of 4

⏪ ⏴ ⏵ ⏩

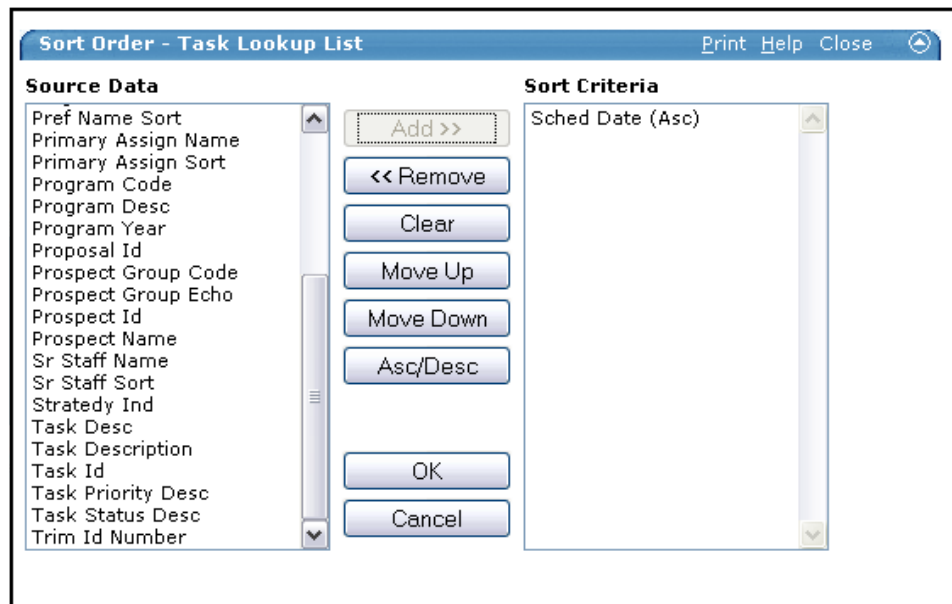
New Search
Refine Search

Task Lookup List (4)
Actions Help

...	Prosp/Entity Name	Orig Date
Program		Compl Datet
Task	Contact re being in Drexel, or my future visit to Boston	Assg
Status	Pending	Descr
Priority	Medium	Alloc Code
Resp	Mr. Michael Andrulis	Cntrct Grnt
Sched	Jul 08, 2009	
...	Prosp/Entity Name Mr. John Benedict (#376754)	Orig Date
Program		Compl Datet
Task	Please send a letter to Mr. Benedict with a summary of our recent conversation.	Assg
Status	Pending	Descr
Priority	High	Alloc Code
Resp	Mr. Michael Andrulis	Cntrct Grnt
Sched	Oct 09, 2009	
...	Prosp/Entity Name Mr. John Benedict (#376754)	Orig Date
Program		Compl Datet
Task	Please give John a call and discuss his giving options with the University.	Assg
Status	Pending	Descr
Priority	Medium	Alloc Code
Resp	Mr. Michael Andrulis	Cntrct Grnt
Sched	Sep 28, 2009	
...	Prosp/Entity Name Mr. Patrick Michael Curran (#153091)	Orig Date
Program		Compl Datet
Task	Reschedule campus visit for Fall '09	Assg
Status	Pending	Descr
Priority	Medium	Alloc Code
Resp	Mr. Michael Andrulis	Cntrct Grnt
Sched	Jul 30, 2009	

- To jump directly to the **Entity Task** application for an entity, click the button beside the record. To jump to the **Entity Overview** for the entity, click the hyperlinked (underlined) **Name** of the entity.

- To sort the results, click the **Actions** menu in the **Task Lookup List** header and select **Sort**. The **Sort Order** window displays:



- From the **Source Data** column, select the field to sort by and click **Add**.
- The field name now appears in the **Sort Criteria** list. To change the sort from ascending to descending (or vice versa), select the field name and click the **Asc/Dec** button.
- Click **OK** to perform the sort.



Troubleshooting:

- The behavior of the **Sort** feature for result lists is erratic. It may be necessary to perform the same sort several times in order to force the list to refresh properly and display the results in the desired order.
- Sorts work better when there are fewer results to display, that is, a larger list seems to be more difficult to sort.
- The **Sort** feature performs very poorly when using Firefox. Internet Explorer works better, but it is not 100% reliable either.

Printing a List of Tasks

If necessary, a list of tasks can be displayed and printed for offline use. You can print all of the results returned by a lookup, or you can choose to print a single page of results. If you wish to further sort and manipulate the lookup results list, it may be best to export the results to Excel (see the **Tip** following these procedures).



Procedure: (To print the entire lookup results list)

1. From the Advance Web Main Menu, select **Lookups**. The **Lookups** application displays.
2. In step #1, the **Choose a template** list, select **Prospect – Tasks**. After selecting this, wait a moment while Advance refreshes the Lookup application.
3. In step #3, the **Select output type** list, select **Print results**.

Lookups Actions Close

1. Choose a template (optional) Prospect - Tasks

2. Select results format* Task Lookup List

3. Select output type* Print results

4. Select additional criteria from page tree (optional)

5. Enter criteria below and click Search

View Criteria Clear Search

4. Define your search criteria and click the **Search** button.
5. Depending on the number of results in the search, Advance will either display the results that match the criteria, or it will display a warning indicating that “The number of records may delay the time to display them.” To ignore the warning and display the results anyway, click the **Continue** button.

Lookups Actions Close

You have entered 3 criteria. Your search resulted in 111 records.
The number of records may delay the time to display them. Consider selecting a different output type.

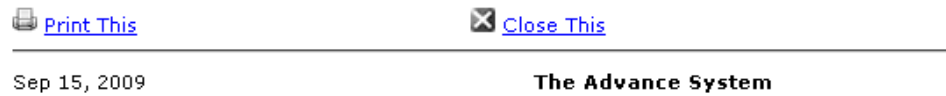
Print results

New Search Refine Search Continue

6. A new browser window displays the search results. **NOTE:** This window will most likely “pop-under” your current browser window, so you may need to select this window on the Windows taskbar in order to view it.

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- Click the **Print This** link in the upper left corner. The **Print** dialog box displays.



- Select a printer or other options as necessary and click **Print**.
- When the list has printed, click the **Close This** link to close the new browser window.

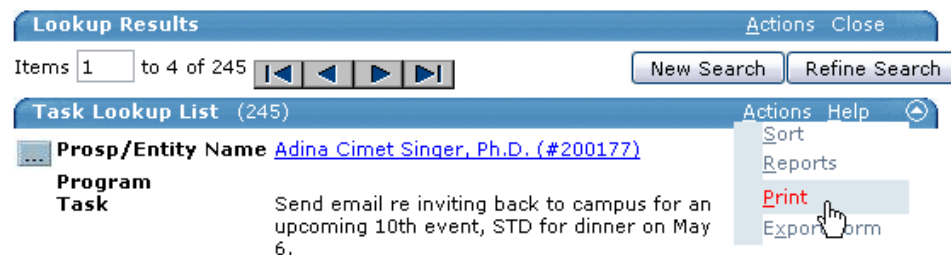


Procedure: (To print a single page of results)

- Follow the **Generating a List of Tasks** procedure to display a list of results.
- If necessary (if there are more than four results for the search) use the VCR controls to scroll the results list to the desired page.



- From the **Actions** menu of the **Task Lookup List** form header, select **Print**.



- A new browser window opens with the results of the search displayed.
- Click the **Print This** link in the upper left corner. The **Print** dialog box displays.
- Select a printer or other options as necessary and click **Print**.
- When the list has printed, click the **Close This** link to close the new browser window.
- To print another single page of results repeat steps 2-7 of this procedure.



Warning:

- Once the PrintForm window has opened, the VCR controls of the search are displayed, however, these controls do not work. In order to display and print another page of results, close the PrintForm window (click the **Close This** link) and navigate to the next page of results in the original lookup results window.



Tip:

- For further sorting and data manipulation of the lookup results list, it may be best to export the list to Excel and print from there. To export the results to Excel, select the **Actions** menu from the **Task Lookup List** form header and choose **Export Form**. When asked to open or save the file, select **Open**. A new Excel spreadsheet displays with all of the output fields from the form as columns. Delete any unneeded columns, format the worksheet, and print as desired.

The screenshot shows a web interface for 'Task Lookup List' with 245 items. The top bar includes 'Lookup Results', 'Actions', and 'Close'. Below this, it shows 'Items 1 to 4 of 245' with navigation buttons and 'New Search' and 'Refine Search' buttons. The main content area shows a task for 'Adina Cimet Singer, Ph.D. (#200177)'. The task details are as follows:

Program	Task	Descr
	Send email re inviting back to campus for an upcoming 10th event, STD for dinner on May 6.	
Status	Pending	

The 'Actions' menu is open, showing options: Sort, Reports, Print, and **Export Form** (highlighted in red). A mouse cursor is pointing at 'Export Form'.

Updating an Existing Task

At times, it may be necessary to update or modify an existing task, such as changing the scheduled date, priority, or updating the description.



Procedure:

1. Using the previous procedures, lookup an entity and display the **Entity Tasks**.
2. If there is more than one task listed in the **Tasks** table, select the desired task from the list. The task details display below the table.
3. Change or update any of the fields of the task as necessary.
4. When finished, click **Save** in the **Tasks** form header.



5. The browser refreshes the window and the changes are saved.



Tip:

- Once a task has been assigned to a user, it is not possible to reassign it. To assign the task to another user, change the **Status** of the task to **Cancelled** or **Completed**, update the **Description** to reflect that the task is going to be reassigned, and create a new task with a new user responsible.

Deleting a Task

In rare cases, you may wish to delete a task instead of cancelling it or closing it. This procedure PERMANENTLY deletes the task. There is no Undo command for this procedure, so please be absolutely sure of your decision before you do it.



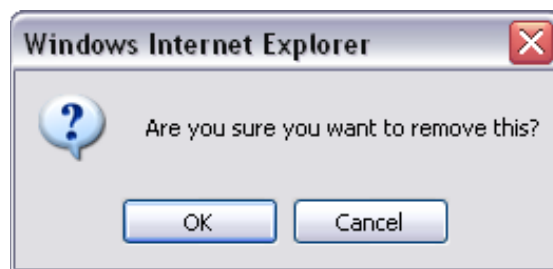
Procedure:

1. Follow the previous procedures to display a list of tasks and select a task from the **Tasks** table so that its details display below the table.
2. From the **Actions** menu of the **Tasks** form header, select **Delete**.

The screenshot shows the 'Entity Task' form for 'Mr. John Benedict #376754'. Below the entity details is a 'Tasks (2/2)' table with columns: Task, Status, Scheduled, Completed, and Respo. The first row is 'Telephone Call' with status 'Pending' and scheduled date 'Sep 28, 2009'. The second row is 'Correspondence' with status 'Pending' and scheduled date 'Oct 09, 2009'. An 'Actions' menu is open over the table, showing options: Sort, Paste, Audit Info, Reports, Print Form, Export Form, and Delete (highlighted in red). A mouse cursor is pointing at the 'Delete' option.

Task	Status	Scheduled	Completed	Respo
Telephone Call	Pending	Sep 28, 2009		Mr. Michael And
Correspondence	Pending	Oct 09, 2009		Mr. Michael And

3. The web browser will prompt you to confirm this action. To continue, click **OK**. To cancel, click **Cancel**.



4. The task is deleted from the **Tasks** table.

Closing a Task

When a task has been finished or completed, the **Status** of the task should be changed, as well as the **Completed** date of the task should be entered. This procedure should be performed by the person responsible for the task, however, anyone (with the proper permissions) can perform these steps.



Procedure:

1. Using the previous procedures, lookup an entity and display the **Entity Tasks**.
2. If there is more than one task listed in the **Tasks** table, select the desired task from the list. The task details display below the table.
3. Select the drop-down menu of the **Status** field and choose **Completed**.

Task* COR Correspondence
Status* C Completed
Priority (none)
Description* P Pending
C Completed
X Cancelled

4. Use the **Completed** calendar control to select the date the task was completed. To set the completed date as the current date, click the **Today** button.

Completed
Original
with a
Recu
Recu
Recu

Aug	September 2009						Oct
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
30	31	1	2	3	4	5	
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30	1	2	3	
4	5	6	7	8	9	10	

Clear Today Close

5. Update the **Description** (or any other fields) as necessary.
6. In the **Tasks** form header, click **Save**.

- The changes are saved, and the **Completed** column of the **Tasks** table displays a date.

Tasks (2/2) Save New Actions Help				
Task	Status	Scheduled	Completed	Responsible
Telephone Call	Pending	Sep 28, 2009		Mr. Michael Andrulis #367594
Correspondence	Completed	Oct 09, 2009	Sep 15, 2009	Mr. Michael Andrulis #367594



Tip:

- A task that has been marked as **Completed** can be “reopened” by changing the **Status** to **Pending**. The **Completed** date can be cleared by clicking the calendar control drop-down, and then selecting the **Clear** button.

Quick Reference Guide



Creating a Task for an Entity: (see page 2)

1. **Lookup** and/or select an entity.
2. Expand the **Prospect Tracking** menu on the left, and select **Tasks**.
3. Click **New** in the **Tasks** form header.
4. Fill out the fields in the details section and click **Save**.



Generating a List of Tasks: (see page 6)

1. Go to the **Lookups** application.
2. Choose the **Prospect – Tasks** template (#1) and **Display results** (#3).
3. Enter the search criteria in the **Task Lookup** section.
4. Click the **Search** button to execute the search.



Printing a List of Tasks: (see page 9)

1. Go to the **Lookups** application.
2. Choose the **Prospect – Tasks** template (#1) and **Print results** (#3).
3. Enter the search criteria and execute the search.
4. In the new window that opens, click **Print This**.



Updating an Existing Task: (see page 12)

1. Lookup an entity and display the **Entity Tasks**.
2. Select a task in the **Tasks** table and make changes in the detail section.
3. **Save** the changes.



Closing a Task: (see page 14)

1. Change the **Status** of the task to **Completed**.
2. Select a **Completed** date using the calendar control.
3. **Save** the changes.