Tasks Configuration

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> This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

Set up Task Type

The tasks menu allows the user to create/edit task types. Task Types cannot be deleted.

1. **Add a New Task Type**
    a. Click **Administration (**must have the right permission see **Permission and what it enables)**
    b. Select **Tasks** from the left side menu.
        i. The Task Types screen will display.
    c. Select the **New** button.
        i. The Add new task type screen will display.
    d. Complete the following fields based on the table below.
    e. When done, click **Create Task Type**.

Note:

- **Optional (This is the default option)** - Not a required a field but it will show when creating a task
- **Required** - Field is mandatory to fill in when creating a task
- **None** - Field will be hidden

Field	Description	Example / Values
Code	This is the unique code for the task type. This cannot be changed once created.	BILL
Name	This is the unique name of the task type - this is case sensitive.	Billing details
User Assignment	This is a drop down list with the following values: Optional (This is the default option) Required None	Assign to staff i.e Clintel Test

Location Assignment	This is a drop down list with the following values: Optional (This is the default option) Required None	Select a Location that this task will apply to i.e Clintel Clinic
Patient/ Contract Assignment	This is a drop down list with the following values: Optional (This is the default option) Required None	If set to Required then the field is mandatory when creating as task
Assignment Group	Select a Group that only this task type can be assigned to	
Creation Group	Select a Group that only this task type can be created by	
Enabled (check box)	Enable is ticked by default.	Task can be disable by unticking the Enable box

Dashboard Display set up

Allow my tasks to show in the dashboard main page. (For each staff member to see what tasks were assigned to their list

Steps:

1. From **Administration.**
2. Click **on Global settings.**
3. Set **Dashboard** show task to **true.**

   3.a. For group task to display on dashboard set Dashboard Show Group Tasks to **true.**

4. Scroll down and click **Change** to save.