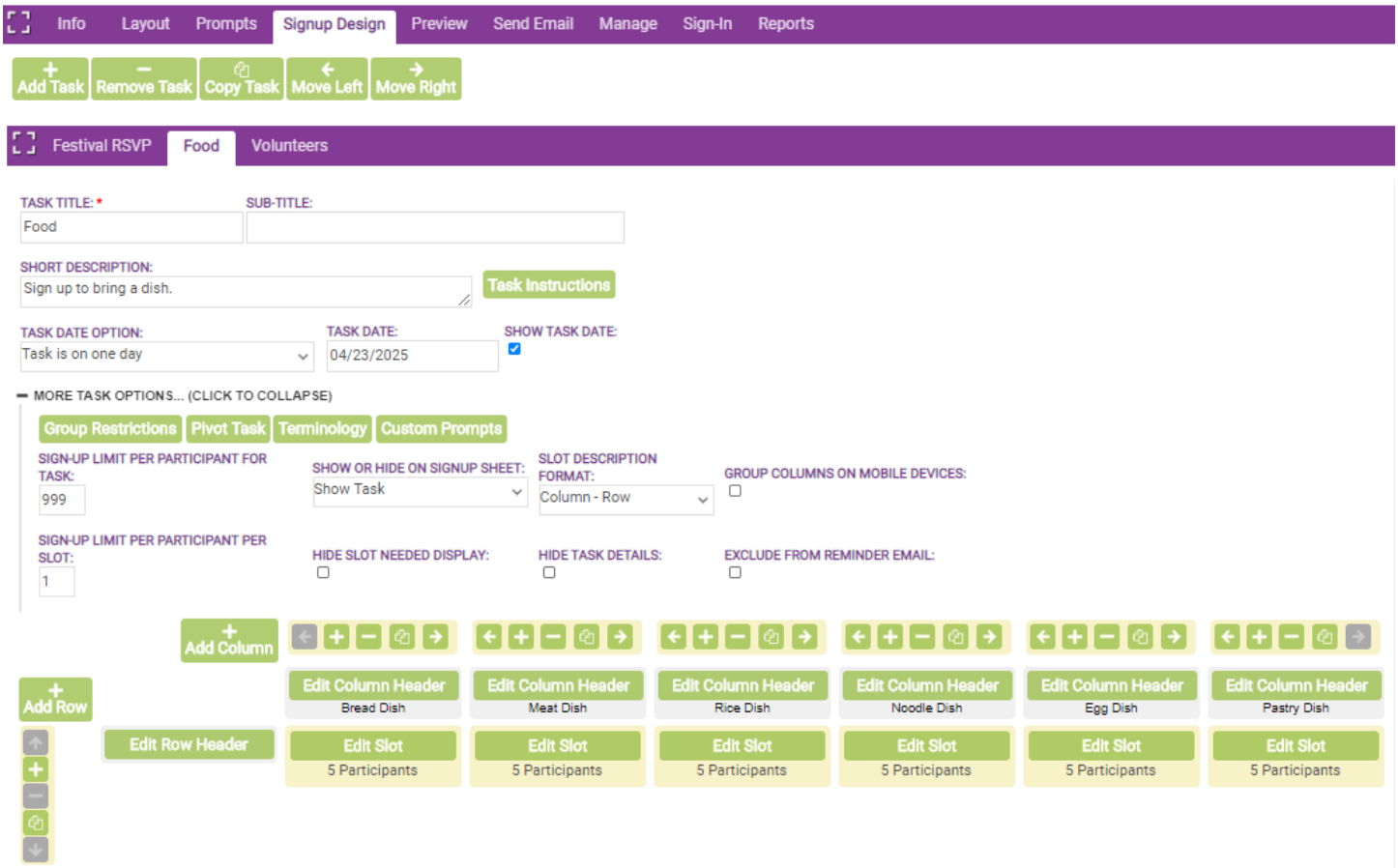
Working with Tasks

Editing Event Details · https://ivolunteer.com/support-docs/working-with-tasks/

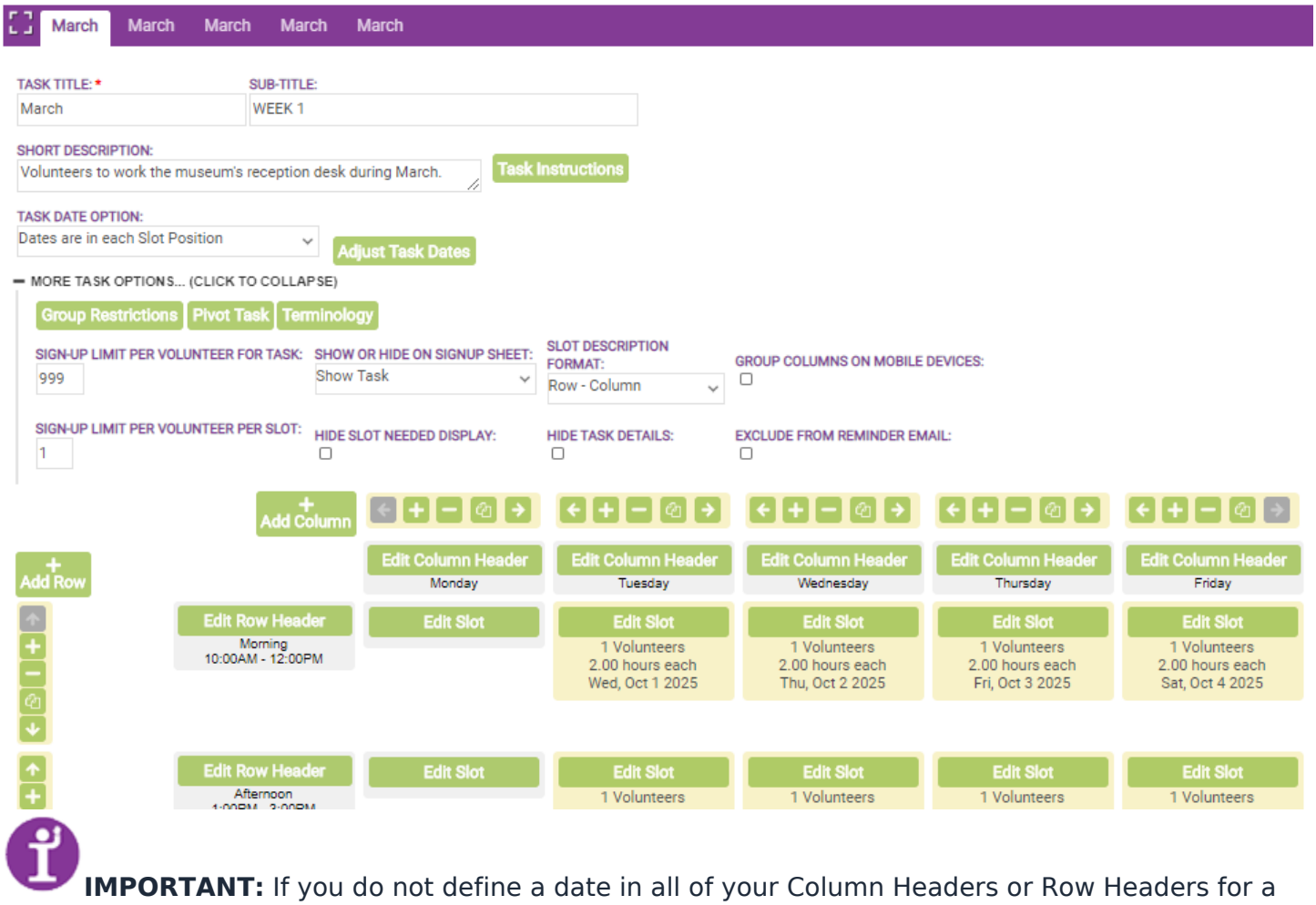
Creating a New Task

1. Click on the **Add Task** button.
2. Give the task an appropriate title. This is the title that will appear in the tab for this task on the signup sheet.
3. Check the date of the task. The value in the **Date** field defaults to the start date of the event, but if your event spans multiple days, you can make each task represent a different day or create a task that spans many days. When you configure a Task to be over "more than one day," you also need to tell the system on which axis the dates will be defined. Your choices are Column Headers or Row Headers.
4. **Add columns and rows** to your new Task Signup Sheet.

Here is an example of a Task configured to happen on one day:



Here is an example of a Task configured to happen over many days:



IMPORTANT: If you do not define a date in all of your Column Headers or Row Headers for a Task that spans more than one day, the Event Start Date will be used for that Column or Row.

Additional Task Options

After you create a task, you can customize it.

- **Sub-Title:** Optionally add a sub title for this task. This will show up above the Task Signup Sheet.
- **Short Description:** Optionally enter a short description of this task. This will appear above the Task Signup Sheet but below the Sub-Title (if one is provided)
- **Task Instructions:** Optional formatted instructions for the volunteer. Instructions will show up in the slot details for the volunteer on the volunteer's page.
- **Task Date Option:** Choose how dates apply to the slots in this Task. The **Adjust Task Dates** button is available when the Task Date Option is Dates are in Column Headers, Dates are in Row Headers, or Dates are in each Slot Position.
  - **Task is on one day** – Every slot uses the same Task Date.

- **Task spans Event dates (no specific date)** – The Task does not need a specific date.
- **Task spans Task dates (no specific date)** – The Task has its own date range within the Event. Enter a **Task Start Date** and **Task End Date**. Useful for a monthly Task where participants report their hours.
- **Dates are in Column Headers** or **Row Headers** – the date in each header applies to every slot in that column or row. A header with no date uses the Event dates.
- **Dates are in each Slot Position** – Each slot has its own date. A slot with no date uses the Event dates.

To see the following options, click on **More Task Options.**

- **Group Restrictions:** Limit signups for this Task to participants already in your database or to members of selected groups. You may edit the Restricted Message shown to others when they try to sign up.
  - To pause signups on a Task: Open Group Restrictions, choose Disallow with the Group set to Everyone, edit the message, and click OK. Verify in the warning box and save. To delay signups for the whole Event instead, set the Signup Start Date on the Info tab.
- **Pivot Task:** Task Rows will become Columns and Columns will become Rows.
- **Terminology:** Select Terminology to be used only for this Task. It will override the settings under Event Settings > Display.
- **Custom Prompts:** This option is visible only if you have created custom prompts for your Event. This section allows you to select prompts that only apply to this Task. By default, all custom prompts are selected. Here is a quick example of how you might use this option: Suppose you have hats and t-shirts to give out to volunteers. You want hats to go only to volunteers working with food and t-shirts to go to everyone else. You would create two custom prompts for the event: "Hat Size" and "T-Shirt Size." For any of the Tasks involving food, you would uncheck the "T-Shirt Size" field so that volunteers for food would not be asked their t-shirt size. Likewise, you could uncheck "Hat Size" for all other Tasks so that volunteers for the other Tasks would not be asked for their hat size. (Learn more about **Custom Prompts here**).
- **Location:** To enable a Task-specific location, first select **Various Locations** under Event Details & Actions > **Info** and save your changes. Then your can specify a Location for each Task.

- **Show or Hide on Signup Sheet:** Options are Show Task, Show with Previous Task, and Hide Task.
- **Hide Task Details:** Hides the Sub-Title, Short Description, and Task Instructions.
- **Slot Description Order:** This affects how a slot in the task will be displayed throughout the whole system. Select whether you want the column header (including times, if any) or the row header (including times, if any) to be used first to describe a particular slot in the Task. E.g., Column 1:00 PM to 2:00 PM - Row or Row - Column 1:00 PM to 2:00 PM.
- **Group Columns on Mobile Devices**
- **Sign-Up Limit per Volunteer:** Limit the number of slots that a participant can hold for this Task or for individual slots. This value can be adjusted while the event is running as needs change. See Participant Slot Limit for Event in Settings to learn how to adjust this limit for the whole event. If a participant tries to schedule more slots than this number, she will see a message that she has reached her limit for this Task. She will not be allowed to sign up for another slot unless she cancels another slot in this Task first.
- **Hide Slot Needed Display:** Regardless of Event Display settings, do not show how many volunteers are still needed for Task and/or slots.
- **Exclude From Reminder Email:** Do not send reminders for the slots in this Task.
- **Anchor ID:** Enter an ID that you can use in an anchor link in a rich text field to jump to this Task.

Copying a Task

1. Select the task you wish to copy by clicking on the **Task** tab.
2. Click on the **Copy Task** button.
3. Follow the steps above to set the title, dates, and columns and rows of the Task Signup Sheet.

Removing a Task

1. Select the task you wish to remove by clicking on the **Task** tab.
2. Click on the **Remove Task** button.

Changing the Order of Tasks

1. Select the Task you wish to move by clicking on the Task tab.
2. Use the **Move Left** or **Move Right** button to change the location of the Task.