Closing Tasks

Once a task has been completed, you must mark it as Completed in Advance (or you will continue to receive past due reminders).

1. From the Advance home page, click the **My Tasks** shortcut button.
2. Select the task by clicking the ellipses button that appears next to the task.
3. From the **Status** list box, select **Completed**.
4. From the **Completed** calendar, select the date on which the task was completed.
5. Click **Save** from the form header.

Working with a List of Tasks

Sometimes, when a team member who assigned tasks leaves the Foundation, the tasks continue to be an issue for those trying to manage the portfolio while waiting for a new development officer to take over the portfolio, or even after when the new development officer has taken over.

You can bring up a list of the tasks and review them – and determine whether they should be updated to Completed or if you are not sure whether the tasks were done, updated to Cancelled.

1. From the Advance home page, click the **Task** link under CUF Lookups.
2. From the **Responsible Staff** list box, select the person to whom the tasks were assigned.
3. Select **All Task Types**.
4. Click **Run Report**. The system lists all the tasks assigned to that staff member, which gives you a good tool for reviewing all them together.
5. Click the ellipsis button to open a task.
6. If the task was completed, select **Completed** from the **Status** list box.   If you are not sure if the task was completed, select **Cancelled**.
7. In the **Completed** date box, select a date.
8. Click **Save** from the form header.