

Again thanks for the continued positive feedback on the new OIT Task instructions. Please find some of the questions that we have received on OIT tasks along with the answers and instructions.

QUESTIONS

1. If a task in OIT is completed, can I re-open the task? – **Yes you can. Instructions Below:**

▶ OIT Archive Project	wendyf	Completed		
▶ OIT TAKS INSTRUCTIONS	wendyf	Completed	100	No

Right Mouse Click on the Completed task



Re-Open Task will appear. the dates of the task

subject: OIT TASK | INSTRUCTIONS

Task Details (Owner)

Start Date: Thursday, 1 September 2016 Status: In Progress

Completion Date: Thursday, 1 September 2016 % Complete: 0 Priority: Normal

Task Details (Assignee)

Start Date: Thursday, 1 September 2016 Status: Not Started

Completion Date: Thursday, 1 September 2016 % Complete: 0

Attachments | Task Notes | Reminders | Status | History

Name

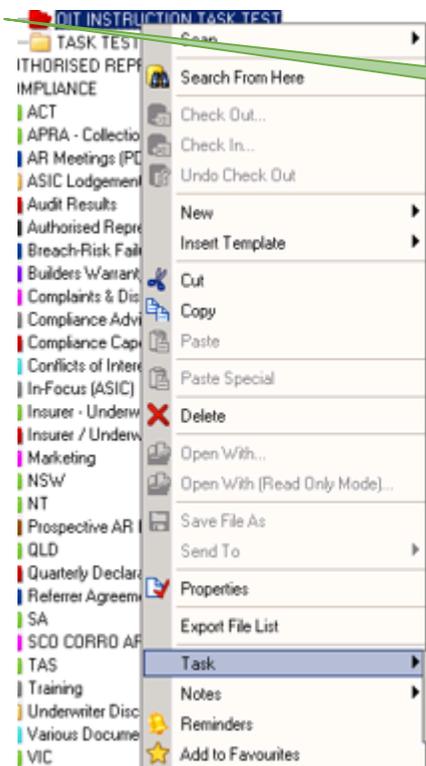
▶ OIT INSTRUCTION TASK TEST

Change the Status of your Task. Update the dates of your task.

2. Can I have more than one Task on one folder? **Yes. You can have as many tasks against one folder as you like.**



My OIT Folder



1. Right Mouse Click on Folder

2. Select Task, Select show task

This will then show a list of all tasks attached to this

Look in: [organiseit [zDIT_WC]\Westcourt\AR BROKER SERVICES\TASK MANAGEM ...]

Start Date From: [Thursday, 1 September 2016] To: [Thursday, 1 September 2016]

Due Date From: [Thursday, 1 September 2016] To: [Thursday, 1 September 2016]

Buttons: Search, Report, Reset

	Subject	Owner	Status	Avg. Completed	Public	Start Date	Due Date	Creation Date	Finish Date	Priority
▶	DIT TASKS INSTRUCTIONS	wendyf	Not Started	0	No	01/09/2016	01/09/2016	30/11/2015 11:33:56	08/01/2016 11:48:25	Normal
▶	TASK TEST 1	wendyf	Not Started	0	No	01/09/2016	01/09/2016	01/09/2016 19:44:05		Normal
▶	TASK TEST 3	wendyf	Not Started	0	No	01/09/2016	01/09/2016	01/09/2016 19:44:20		Normal
▶	TASK TEST 4	wendyf	Not Started	0	No	01/09/2016	01/09/2016	01/09/2016 19:44:34		Normal

REMINDER FOR INSTRUCTION

As part of the transition to our new IT environment there will be changes to the way that Tasks are handled in Outlook. As part of the new IT Transition we will be moving everyone over to an Office 365 platform for emails. This will be a gradual process and there has been a lot of work done behind the scenes to ensure a smooth transition for all.

The new email system, Office 365 will not be able to support data files kept in a task (ie: PDF, **Word** etc.). Written Text Tasks will still be available for use in the new Office 365 platform but any files, emails or attachments relating to a task are to be saved in OIT (OrganiseIT). Please click control and the link to see the new instructions for data files in our Westcourt User Manual.

[F:\Westcourt Insurance\Authorised Representative Information\Manuals\User Manual\User Manual \[v22 August 2016\].pdf](F:\Westcourt Insurance\Authorised Representative Information\Manuals\User Manual\User Manual [v22 August 2016].pdf)

You may like to use a combination of both Office 365 Tasks and OIT.

Westcourt Best Practice is for you to manage your whole task in OIT. Please find attached detailed instructions and video URL Link to our Private You Tube Channel. The video is best **viewed** outside the Westcourt System by copying the following URL and pasting into your Web Browser.

<https://youtu.be/lvgNxNY-yy0>

PLEASE NOTE: From a user experience your Office 365 email platform will not look or operate any different to the current Outlook system.

Over the next four weeks we would like you to change your current process of how you use tasks. Please discuss this with your office and how this will impact your current processes. You will need to look at the following:

1. How do we currently use tasks?
2. How do we currently use OIT and are we filing all correspondence effectively?
3. Are the new instructions clear for my training needs?
4. Will our office require further training?

State Managers and our Training department will support you during this change in process and **will be** there for future training or any questions or comments that you may have. There are a number of Authorised Brokers in the Westcourt Network that use tasks in OIT very successfully and have transitioned from Outlook to OIT and love the tracking and reporting functions that can be used in OIT.

Further communication and information will follow as we get closer to changing over to the new Office 365 platform.