

Quick Start Guide - Task Contacts

If a user has a question about a specific task, contacts help route the inquiry to the appropriate person and/or department.

A contact is the go-to person or department (along with their phone, email, and/or website) for any questions or concerns about a specific task.

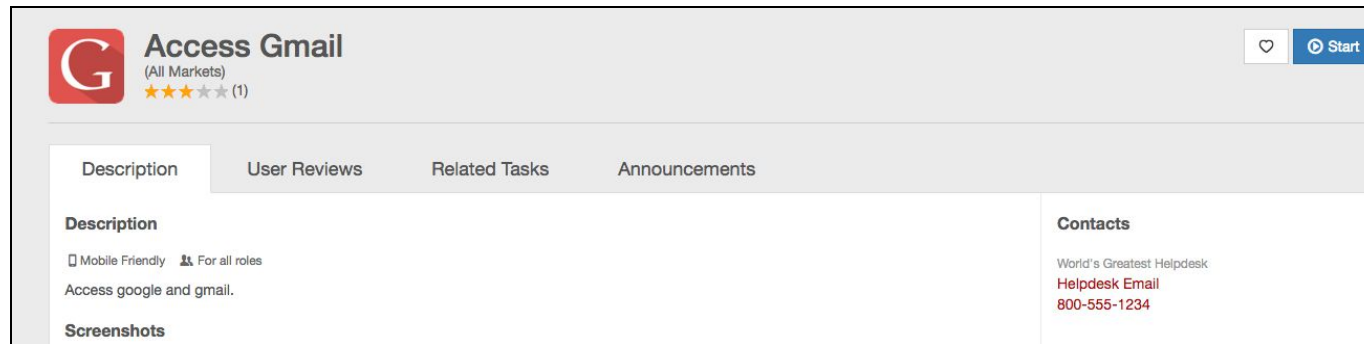
IMPORTANT: Each Task will require a primary contact so you will need to add at least one contact before setting up your first task.

Add a contact

- 1 Begin by clicking the **Task** menu, then select **Task Contacts**.
- 2 Click the **+New Contact** button.
- 3 Enter a **Display Name** for the Contact **[Required]**
 - As a best practice, enter a Display Name that best describes the department or division. For example, you may use “World's Greatest Help Desk” or “Department of Sponsored Programs.”
- 4 Under **Contact Methods**, enter a **Name**, **Value**, and **Type** then click **Add [Required]**
 - The text you enter for **Name** will be displayed in the Task Details.
 - For the **Value** field, enter the phone number, email address or full URL (including http:// or https://)
 - Then choose the appropriate **Type** (email, phone, Url)
 - Click **Add** between each entry (email, phone, Url)

5 Click **Save** and repeat the above steps to add additional contacts.

Below is a sample of how the contact information will appear in the Task Details:



Notes:

- As a convenience, you may link your campus directory to the New Contact screen so that other OneCampus administrators can easily reference it when they are creating contacts. To add your campus directory link to this page click the Advanced menu > Settings > Campus Directory URL.
- To edit a contact, repeat step 1 and click **Edit** to update.
- To delete a contact, click the **Delete** button. If the contact is being used on tasks, you will see a modal window indicating where it is being used. Click **Edit** next to each listed task in order to switch out the contact on the New Task Definition page.

