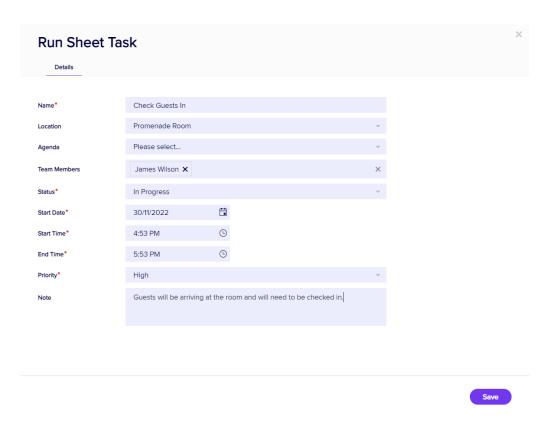
Run Sheet features

Last Modified on 07/09/2024 8:34 pm EDT



Want to jump to a particular section? Use the contents tab to the right of this article

Adding tasks



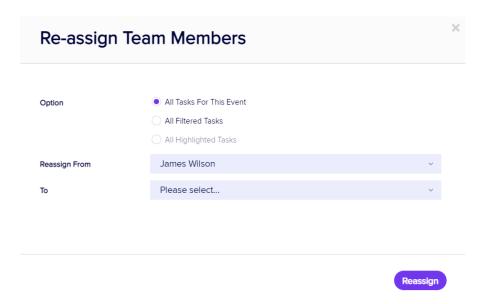
Selecting Add Task lets you add tasks to your Run Sheet. Your options include:

- Name the name of the task.
- Location you can select the location here (once you've defined Locations in either Functions or Presentations module setup).
- Agenda if this task is included on the Agenda, you can indicate the agenda item here.
- Team Members selected from a drop-down list.
- Status lets you set the beginning status.
- Start Date
- Start Time
- End Time
- Priority
- Note enter any text about this item.

Re-assigning team members

Selecting Re-Assign Team Members lets you assign or re-assign tasks to Team Members. You can choose from:

- All Tasks for This Event
- All Filtered Tasks
- All Highlighted Tasks



Import

This option lets you enter your Run Sheet details into an Excel Spreadsheet and import this directly into EventsAir.

There's a wizard to help you match your data fields to the corresponding fields in the Run Sheet.

Must-haves

- You must select a Date Format that matches the date format used in your Run Sheets, and use this for your import details as well.
- You assign team members, status and priority items after your import has been completed.

What you can import

There are six types of data you can import into a specific project:

- Name the name of the Run Sheet item you are importing
- Note the Run Sheet task note
- Start Date use mm/dd/year or dd/mm/year format as required by your region
- Start Time use military (24 hour) time format
- End Time use military (24 hour) time format

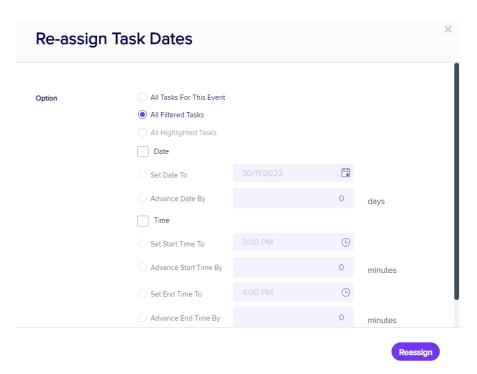
How to import

When you click on Import, you should follow these steps:

- Select your import data file (Excel format).
- Select the Date Format for your region (and reflected in your spreadsheet).
- Assign each column from your spreadsheet to the corresponding field in the Run Sheet list.
- Select Import to complete the import process.

Export

This option will let you export your detailed Run Sheet list to Excel, maintaining the same general format.



Re-assign dates

Re-Assign Task Dates lets you choose tasks and either change the date of the task, or incrementally advance date or time as required.

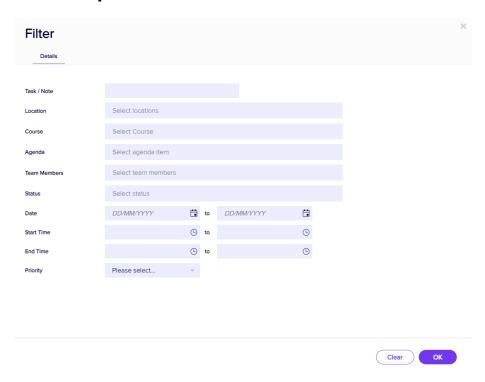
You can choose from:

- All Tasks for This Event
- All Filtered Tasks
- All Highlighted Tasks

Date and Time Settings

You can select either or both Date and Time and edit the date, start time or end time for selected or all tasks.

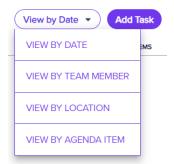
Filter option



Selecting the Filter Option lets you filter your Project Manager view to specific items, such as:

- Tasks/ Notes
- Location
- Course (CE Courses)
- Agenda
- Team Members
- Status
- Dates Range
- Start Time Range
- End Time Range
- Priority

Any custom fields you may have created for the Project Manager can also be filtered on.



View Options lets you change the default view of your Run Sheet:

- View by Date
- View by Team Member
- View by Location
- View by Agenda Item