Adding Bank Items to Tasks

Training Guide

ProgressBook® SpecialServices

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Lesson *Objective*

- **Add bank items to an Open Task**

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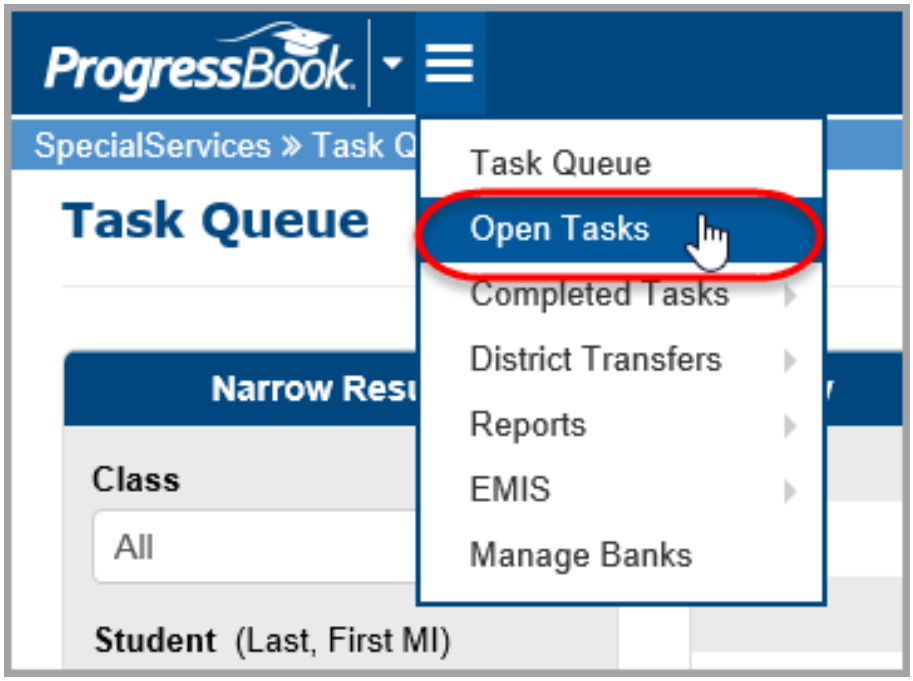
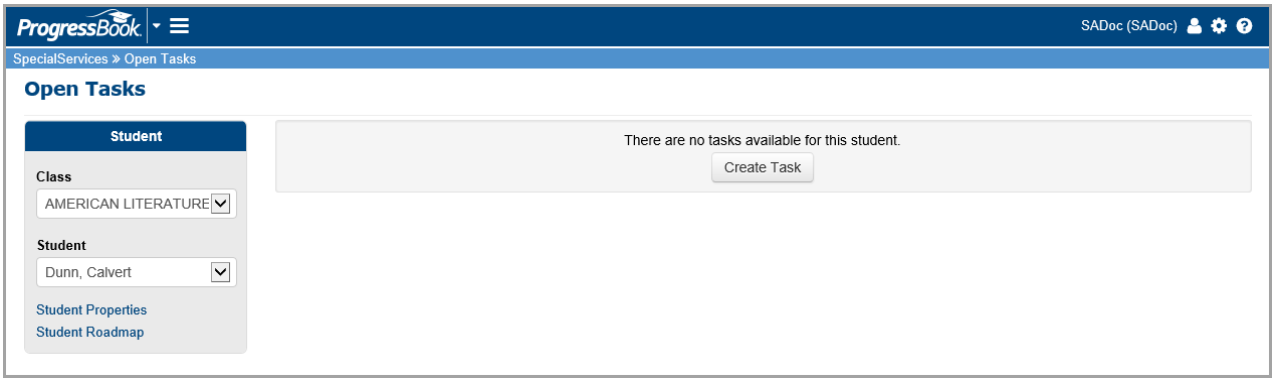
Access & Navigation

Once you are logged in to SpecialServices, click ☰ to access the main menu, and then select **Open Tasks**.

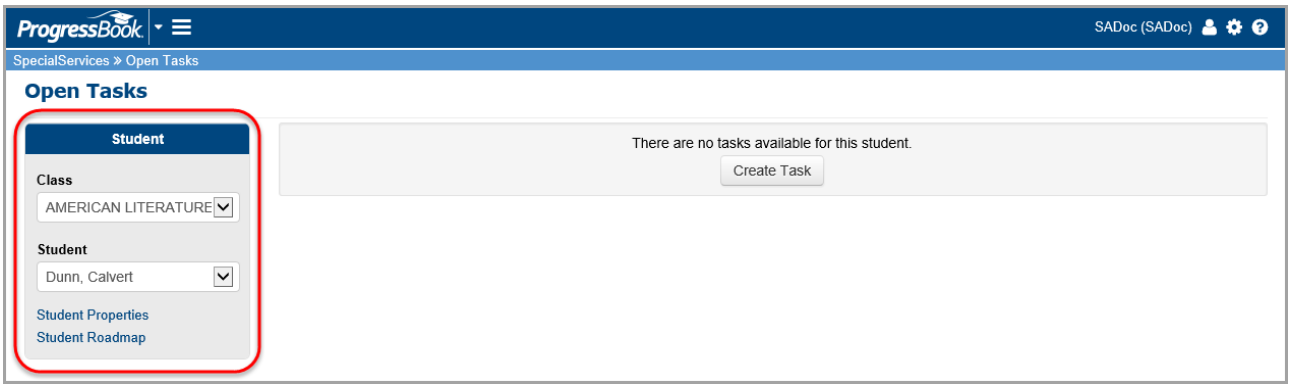


The **Open Tasks** screen displays.

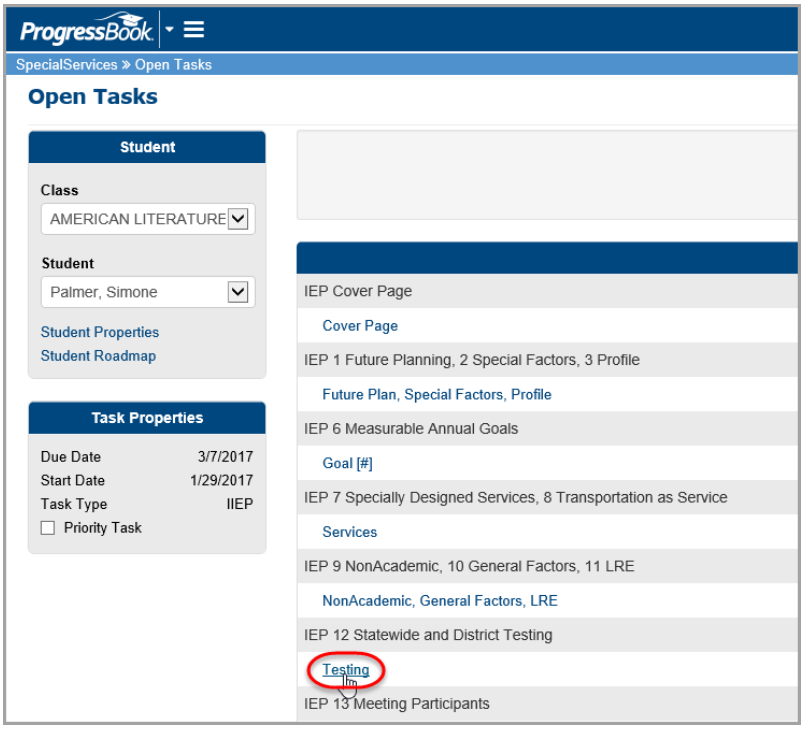


Selecting a Task

On the **Open Tasks** screen, select a **Class** and a **Student** from their respective drop-down lists in the **Student** search area.



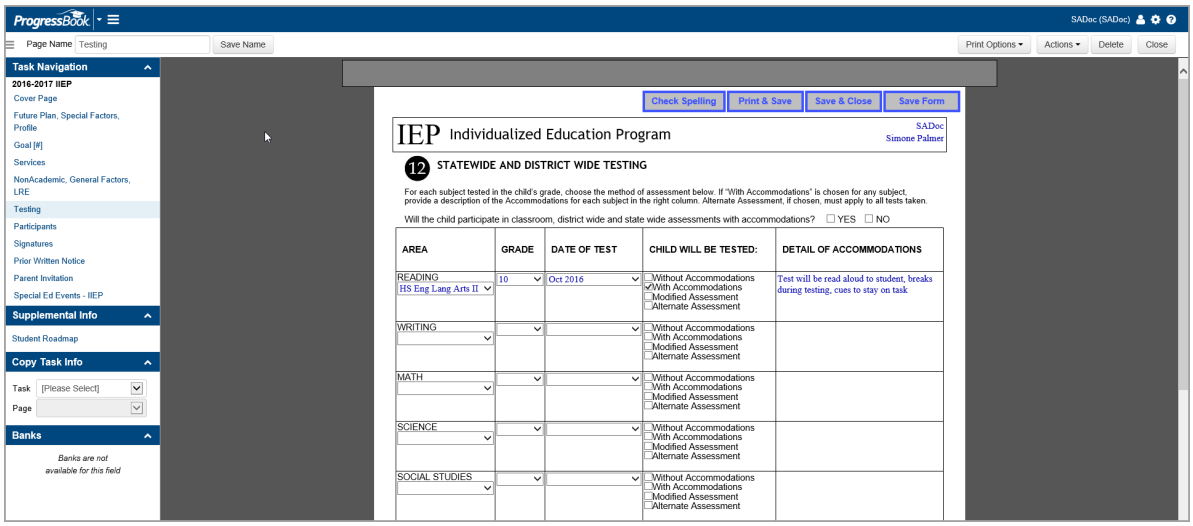
All of the tasks associated with that student display. Click on the task to which you want to add bank items.



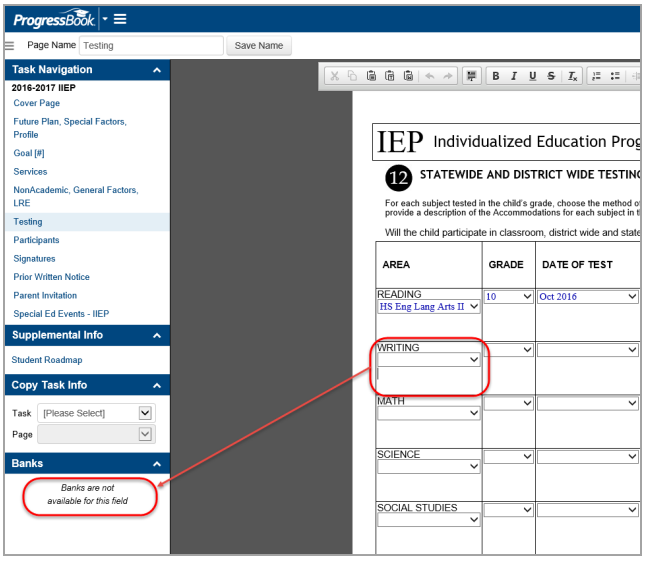
Adding Bank Items to Tasks

Once you have selected the task to which you want to add bank items, the form displays. Click ☰ to expand the **Task Navigation** area if it is not already expanded.

> ***Note**: The **Task Navigation** area remains open when switching between forms. To minimize it, click ☰ .*

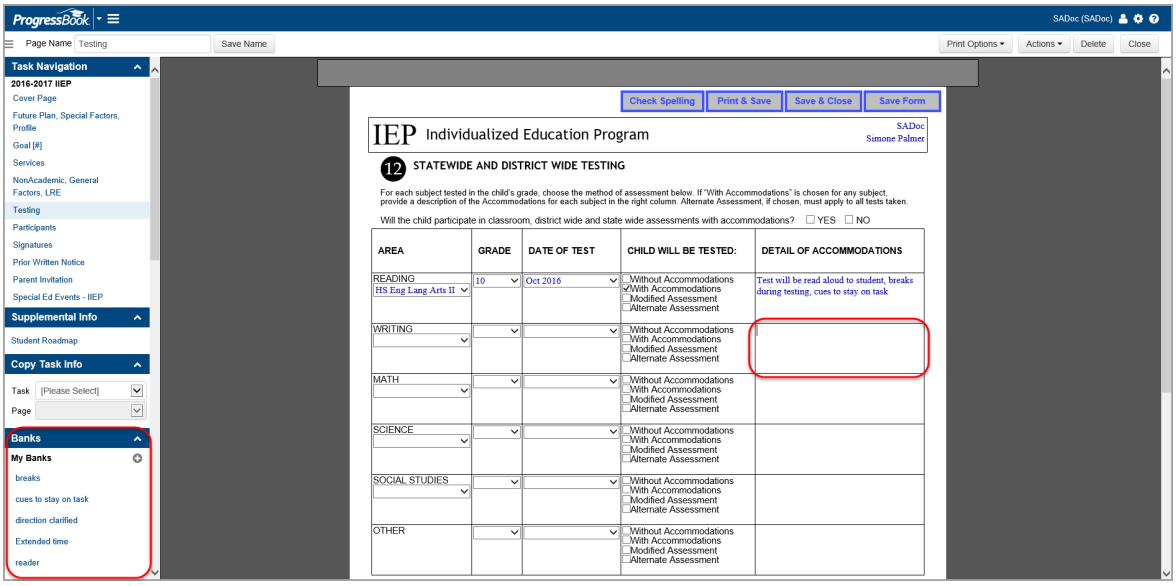


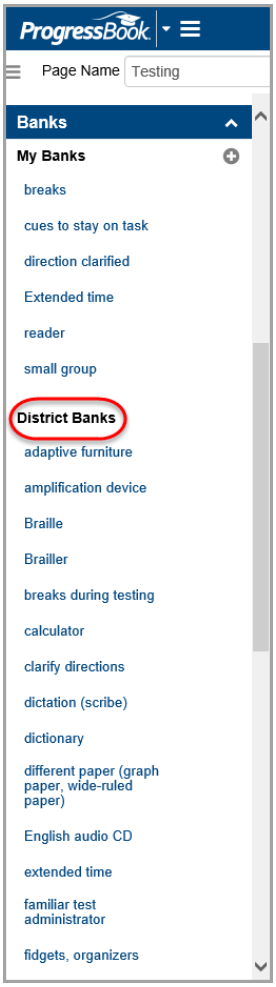
Click on the field to which you want to add a bank item.



> ***Note**: If bank items are not available for a particular field, a notification displays in the **Banks** section of the **Task Navigation** area.*

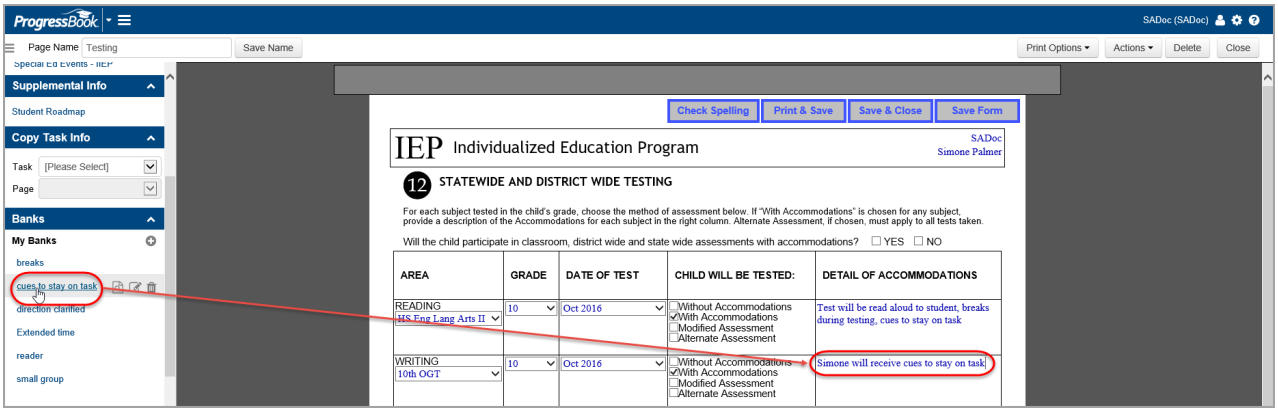
If you select a field where bank items are available, a list of all available banks displays in the **Banks** section.



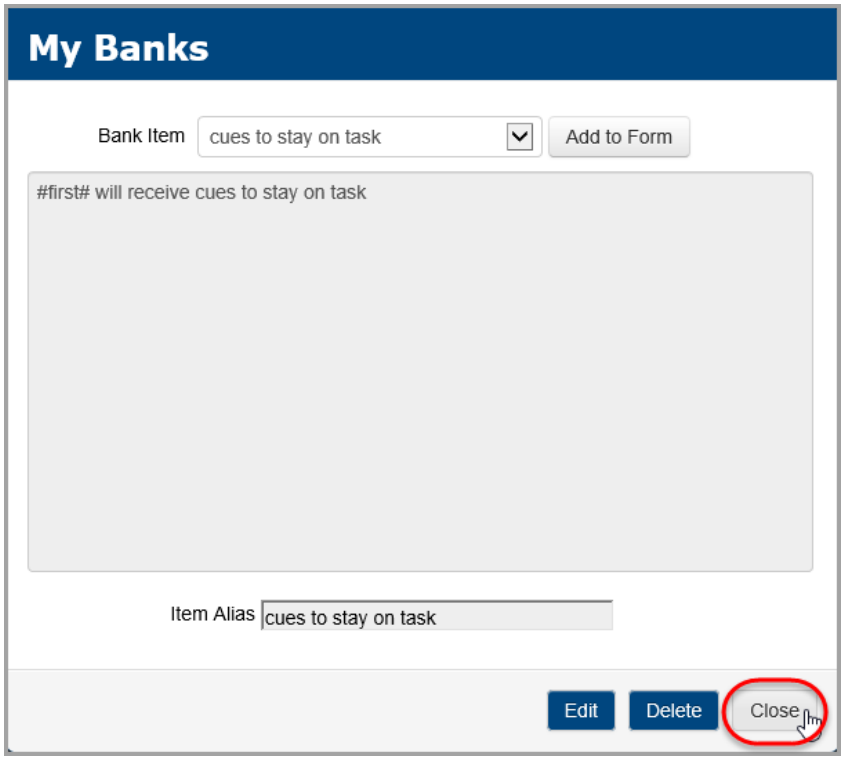


***Note**: Use the scroll bar to view all of the banks you have created as well as the banks created by your district.*

Click on the field to which you want to add a bank item, then click on the bank item under **My Banks**. The text associated with that bank will display in the field.



***Note**: If you are unsure of which bank item to add, you can preview each by hovering your cursor over the bank item until icons display, and clicking* . *The preview window displays. Click **Close** when you are done.*

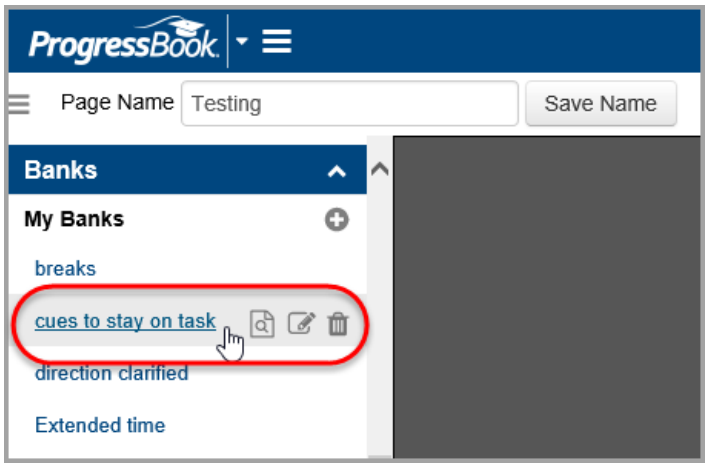


Additional Features

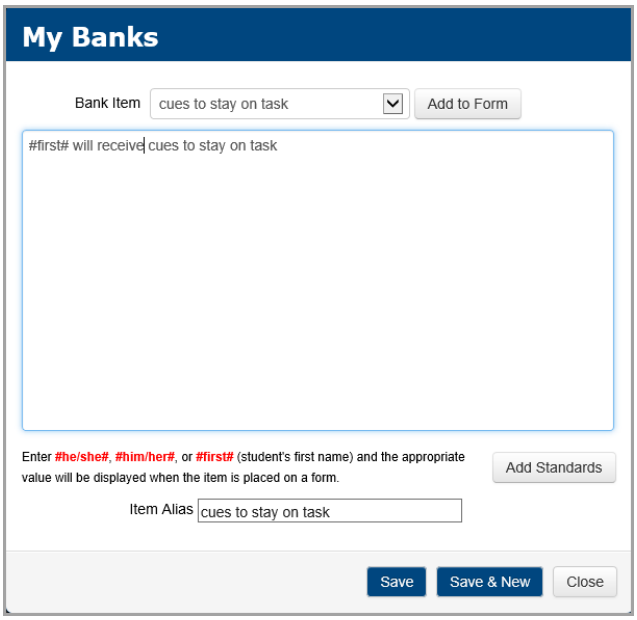
You can edit or delete bank items as necessary from any open task. You can also create new bank items.

Editing Bank Items

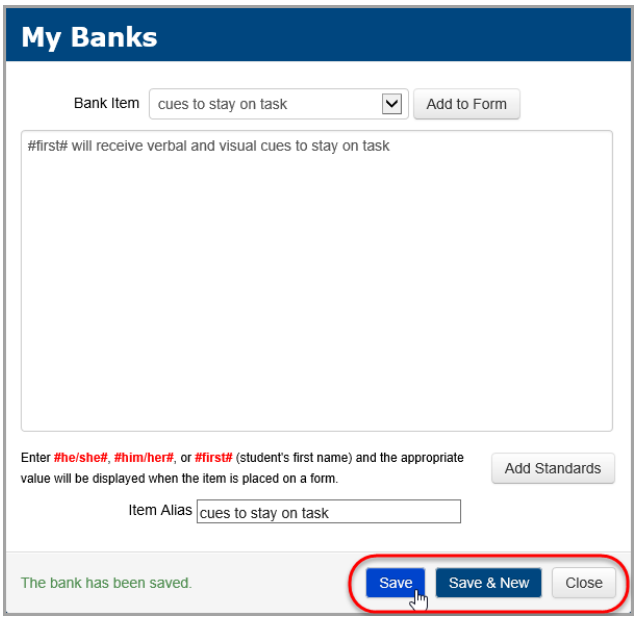
If you wish to edit a bank item, hover your cursor over the bank item until icons appear and click .



The **My Banks** window displays for that bank item.

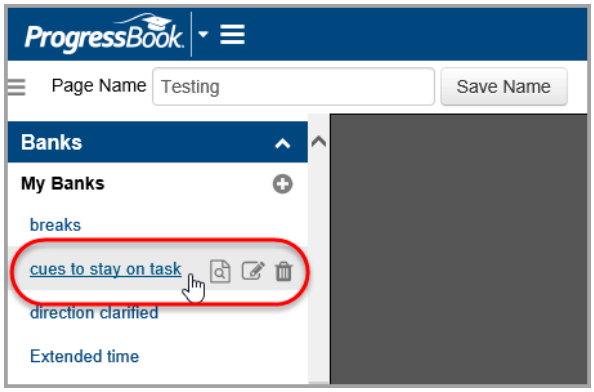


Edit the text as you wish. When you are done, click **Save** followed by **Close**. You are then returned to the previous screen.



Deleting Bank Items

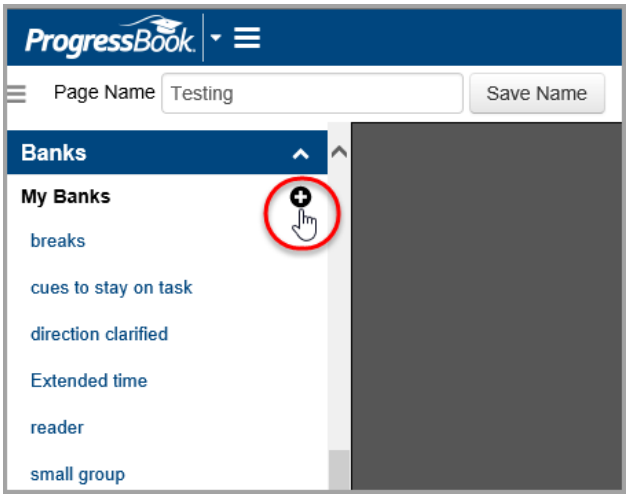
If you wish to delete a bank item, hover your cursor over the bank item until icons appear and click .



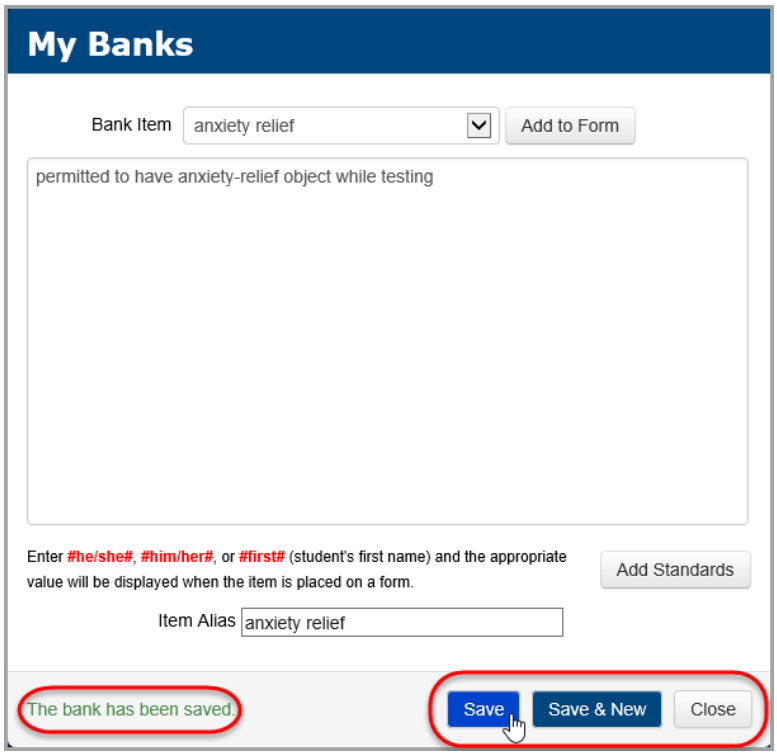
A message displays asking if you want to delete the item. Click **Delete**.

Adding New Bank Items

From the **My Banks** section, click ⊕.



On the **My Banks** window, type in the text for your new bank item. Enter an **Item Alias**. When you are done, click **Save** and then **Close**.



***Note**: If you wish to create another bank item, click **Save & New**. A blank **My Banks** window displays.*