Creating a task list

Software Support - 2017-06-21 - Tasks

Task lists let you create, assign and manage tasks, whilst monitoring their progress.

To create a task list:

1. Go to the folder where you want your task list to appear.
2. Under the **Actions Menu**, click **Create a new item.**
3. Choose to add a **Task List.**
4. Add a name and description.
5. In the **Permissions** section, decide who can view the task list and who can modify it.
6. Click **Save.**

Once you have added your task list you can add tasks to it using the **Actions Menu**. Initially, this will give you a simple pop-up that just requires a task name and optional description and due date. You can also assign the new task to single or multiple workspace members. The detailed add task page also allows you to give the task a priority, make it repeat, and add attachments if you want to.

The task list view gives an overall view of the tasks inside and lets you see any impending or overdue tasks. You can modify or delete any tasks from this view, and you can also quickly change a task's status.

You can also see tasks using the following:

- From the **Workspace Menu** there's a **Workspace Tasks** page which lets you see all of the tasks within the workspace together; including all tasks in task lists and against any item.
- The **My Tasks** link lets you see all tasks assigned to you (across all of the workspaces you are in) and also all tasks created by you.
- In any calendars in the workspace, tasks with due dates can also be seen.
- Workspace homepage or your personal dashboard, by adding a **Task** dashboard item. See Dashboard items.

Related Content

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