Managing Tasks

Aptify's Tasks functionality provides a method for tracking progress on assignments or projects. The Tasks service integrates closely with Aptify's Process Pipeline technology to automatically move the task along as its status changes.

The following is an overview of how an organization might use Tasks to create workflows for day-to-day activities:

1. The organization identifies a need to track a particular set of items as tasks.

2. An administrator creates a new Task Type for these tasks. This includes defining any actions that can assist with automating the workflow.
   - Task Actions fire process flows when a user changes a task's status from one value to another and saves the record.
   - See Creating a Task Type for details.

3. A user creates a new top-level Tasks record for a workflow item. If applicable, the user also creates sub-tasks for specific assignments that can be broken out from the main task.
   - When creating new Tasks, the user can estimate the amount of time required to complete the assignment.
   - See Creating a Task for details.

4. As the Task progresses towards completion, a user modifies the **Status** field to reflect the current status of the item.
   - Depending on the configuration of the task's type, changing a task's status can automatically fire a process flow to automate the workflow of the task.
   - For example, if a user changes a task's **Status** from **Under Development** to **Pending Approval**, Aptify can automatically send an email message to the user's supervisor notifying him or her that the item is ready for management review.

5. When the task is finished, the user updates the Tasks record with the relevant metrics (such as how much time it actually took to complete the task) and changes the task's **Status** to **Closed**, which prevents further modification to the task's details.

This topic contains the following sub-topics related to Tasks:

- Creating a Task Type
- Creating a Task
- Closing a Task
- Reviewing Task Hours