

Create a task

September 10, 2026

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What a task is

A task is a piece of follow-up work that you assign, schedule, and track separately from the business record it supports. Create one when someone needs a dated action, an owner, or a clear completion status. Tasks sit with activities as cross-cutting follow-up work.

If you need to...	Go to
Create a new follow-up task	Open the task-creation page, then follow Before you start and Enter task details
Find a task you already created	Find a task
Add a meeting, visit, or call to a saved task	Handle saved-task options
Work with tasks from the wider workspace	My Desk workspace or Manage tasks from My Desk
Record an activity linked to the task	Record activities from My Desk or Create an activity

Tasks use statuses such as Upcoming, Due, Overdue, In Progress, and Completed. The status controls available on a saved task depend on its current status and on whether you own it.

Before you start

Prerequisites

- You are signed in. The new-task route requires authentication.
- The Tasks subscription is included for your account.

- You have the task title, its priority, a start date, and a due date.
- You know who to assign the task to, if someone other than you owns it.
- You have the description ready if the task needs more context.
- You are creating a new task, or you own an existing task that you have accepted.

The form requires **Priority**, the task title, **Start Date**, and **Due Date**. **Description** and **Assign To** are available when you need them. The page protects unsaved changes when you leave it.

[!NOTE]

A task owner can save a new task. An existing task can be saved by its owner after the task is accepted.

Find a task

Open the task-creation page when you are creating a task. Use the task list when you are locating work that already exists.

Prerequisites

- You are signed in and the Tasks subscription is included.

Steps

1. Choose the page that matches your job.

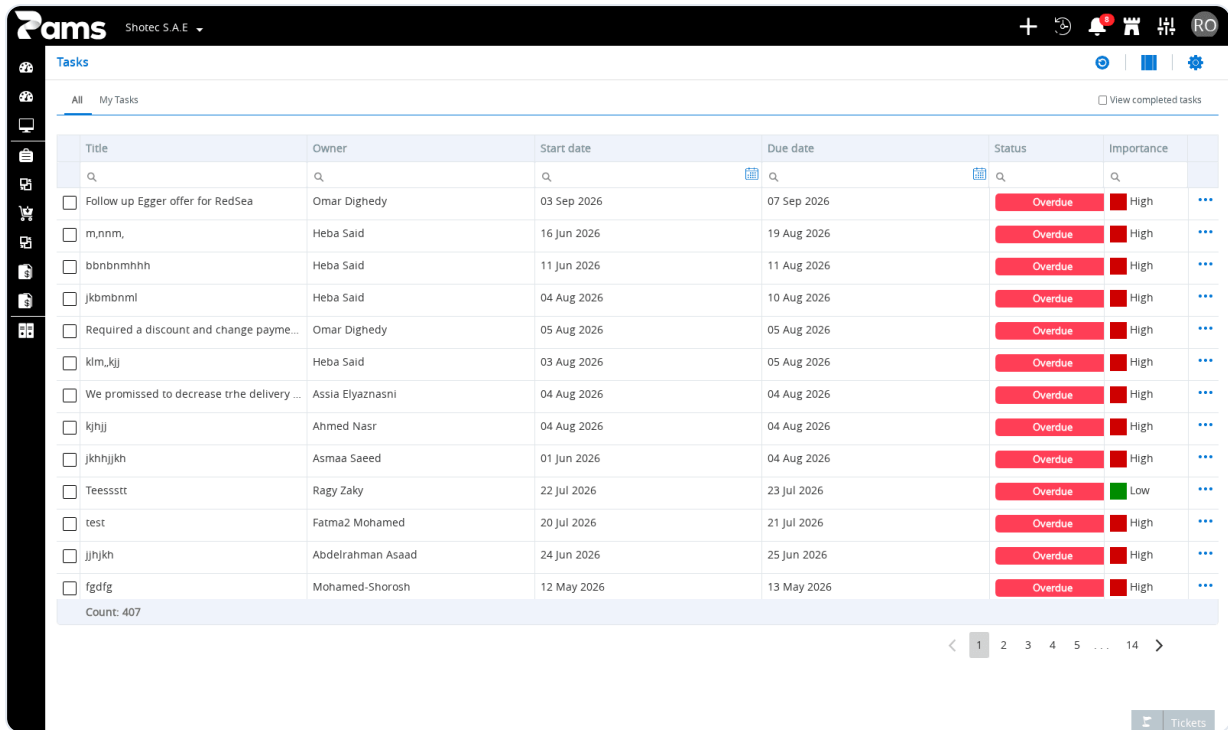
If you need to...	Open
Create a task	The task-creation page
Locate an existing task	Manage tasks from My Desk

2. If you opened the task list, choose the list that answers your question.

If you need to...	Select
View all available task work	All
View your task work	My Tasks
Include completed task work	View completed tasks

3. Read the visible headers to identify the task you need.

The task list can show Title, Owner, Start date, **Due date**, **Status**, and Importance. The list also provides icon buttons titled **Refresh**, **Table Layout**, and **Settings**.



The screenshot shows the 'Tasks' section of the PAMS application. The interface includes a sidebar with navigation icons, a top header with the PAMS logo and user information, and a main content area displaying a table of tasks. The table has columns for Title, Owner, Start date, Due date, Status, and Importance. Each task row includes a checkbox, a title, an owner name, start and due dates, a status (Overdue or On Track), and an importance level (High or Low). A 'Count: 407' is shown at the bottom of the table, and a pagination bar at the bottom right indicates the current page is 1 of 14.

	Title	Owner	Start date	Due date	Status	Importance	
☐	Follow up Egger offer for RedSea	Omar Dighedy	03 Sep 2026	07 Sep 2026	Overdue	High	...
☐	m,nnm,	Heba Said	16 Jun 2026	19 Aug 2026	Overdue	High	...
☐	bbnbnmhhh	Heba Said	11 Jun 2026	11 Aug 2026	Overdue	High	...
☐	jkbmbnml	Heba Said	04 Aug 2026	10 Aug 2026	Overdue	High	...
☐	Required a discount and change payme...	Omar Dighedy	05 Aug 2026	05 Aug 2026	Overdue	High	...
☐	klm,kjj	Heba Said	03 Aug 2026	05 Aug 2026	Overdue	High	...
☐	We promissed to decrease trhe delivery ...	Assia Elyaznasni	04 Aug 2026	04 Aug 2026	Overdue	High	...
☐	kjhij	Ahmed Nasr	04 Aug 2026	04 Aug 2026	Overdue	High	...
☐	jkhjijkh	Asmaa Saeed	01 Jun 2026	04 Aug 2026	Overdue	High	...
☐	Teesstt	Ragy Zaky	22 Jul 2026	23 Jul 2026	Overdue	Low	...
☐	test	Fatma2 Mohamed	20 Jul 2026	21 Jul 2026	Overdue	High	...
☐	jjhjkh	Abdelrahman Asaad	24 Jun 2026	25 Jun 2026	Overdue	High	...
☐	fgdfg	Mohamed-Shorosh	12 May 2026	13 May 2026	Overdue	High	...

Result: The new-task form is open and ready for [Enter task details](#). If you located an existing task, open it and continue with [Handle saved-task options](#).

Enter task details

The new-task form records the task's purpose, priority, description, dates, and assignment. Enter the dates carefully: the **Due Date** starts at the **Start Date**, so a task cannot be scheduled to finish before it starts.

Prerequisites

- The new-task form is open.
- You have the task title, priority, start date, and due date ready.

Steps

1. Open **Priority**.

ams Shotec S.A.E

My Desk > Task > New

Task Purpose

Priority ■ High

Enter...

Owner Ramy Othman

Start Date 09 Sep 2026

Tags +

Due Date 10 Sep 2026

Description

Task Progress 0%

Assign To Select...

Tickets

2. Select a priority value.
3. Enter the task title in the large text area below **Task Purpose**.
4. Enter additional context in **Description** when the title alone does not explain the work.

ams Shotec S.A.E

My Desk > Task > New

Task Purpose

Priority ■ High

Enter...

Owner Ramy Othman

Start Date 09 Sep 2026

Tags +

Due Date 10 Sep 2026

Description

Task Progress 0%

Assign To Select...

Tickets

5. Enter the date on which the task starts in **Start Date**.

ams Shotec S.A.E

My Desk > Task > New

Task Purpose

Enter...

Priority High

Owner Ramy Othman

Start Date 09 Sep 2026

Due Date 10 Sep 2026

Task Progress 0%

Assign To Select...

Save Save and Close X

Tickets

6. Enter a date on or after **Start Date** in **Due Date**.

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My Desk > Task > New

Task Purpose

Enter...

Priority High

Owner Ramy Othman

Start Date 09 Sep 2026

Due Date 10 Sep 2026

Task Progress 0%

Assign To Select...

Save Save and Close X

Tickets

7. Choose the person responsible for the task in **Assign To** when the task belongs to someone else.

The new-task form shows **Owner** and **Tags** as readouts on arrival. **Task Progress** is not shown on the live create surface. The task title, **Priority**, **Start Date**, and **Due Date** are required by the form. The validation messages are **Priority is required** , **Title is required** , **Start Date is required** , and **Due Date is required** .

Follow is not available on the live create form. After the task is saved, **Reminder** becomes available on the saved task.

Result: The task details are entered, with **Start Date** and **Due Date** set in the correct order and **Assign To** set when another person owns the work.

Save the task

Save keeps you in the task flow after creating the task. **Save and Close** saves the task and leaves the form. Both controls are available for a new task owner; on an existing task, they are available to the owner after the task is accepted.

Prerequisites

- The task form contains valid values for its required fields.

- You are the task owner, or you are saving an existing task that you have accepted.

Steps

1. Choose the save action that matches what you want to do next.

If you need to...	Select
Continue working with the saved task	Save
Save the task and leave the form	Save and Close

2. Check for the success message `Data saved Successfully`.
3. Continue from the page that matches your save choice.

If you selected...	Then
Save	Open the saved task.
Save and Close	Return to the page that opened the task form.

Result: The task is saved. **Save** takes you to the saved task; **Save and Close** leaves the form.

Handle saved-task options

A saved task exposes follow-up actions according to its owner, status, branch, and task level.

These options let you respond to an assignment, change completion status, and keep related work with the task.

Prerequisites

- The task is saved and open.
- You know whether you own the task and whether it is accepted, **Overdue**, **Due**, **Completed**, or still active.
- For sub-tasks and activities, you belong to the same branch as the task.

Steps

1. Choose the saved-task action that matches the task state.

If the task is...	Control	Resulting message
Assigned to you but not accepted	Accept	You accepted the assigned task
Assigned to you but not accepted	Decline	You declined the assigned task
Overdue or Due	Consider As Complete	
Completed	Consider As Not Completed	
A top-level task and you need a child task	Sub-tasks , then the add action	
An active task and you need a related activity	Activities , then the add action	

2. Use the saved-task tabs to open the related work you need.

If you need to...	Select
Review child tasks	Sub-tasks
Review or add activities	Activities
Read or add discussion	Comments
Review attached files	Attachment
Review recorded changes	Last Modifications

3. In **Activities**, select the plus icon to open the activity menu.

4. Choose an activity.

Activity control
Meeting
Visit
Call

Result: The selected saved-task panel or follow-up action is open for the task.

Accepting or

declining changes the assignment response; the activity choices open the

corresponding activity

form.

Fix task-entry problems

Use the message on screen to choose the correction. Required-field messages appear when a required value is missing. Ownership and save messages appear when the selected action is not allowed or the save cannot complete.

What you see	What it means	What to do
Priority is required	Priority has no value.	Select a value in Priority .
Title is required	The task title is empty.	Enter the task title below Task Purpose .
Start Date is required	Start Date has no value.	Enter a start date in Start Date .
Due Date is required	Due Date has no value.	Enter a due date in Due Date .
Error Saving Registration	The save did not complete.	Review the required fields and select Save again.
An error occurred while processing your request	An assignment response could not complete.	Reopen the task and retry the action when you are its owner.
Only task owner can take that action	The selected status action is restricted to the task owner.	Ask the task owner to make the status change.

Keep **Due Date** on or after **Start Date**. The form defines **Start Date** as the minimum for

Due Date. The available values in **Priority** and **Assign To** depend on the lists shown when you open those controls.

Result: The task form is ready for a valid save, or the task owner has the information needed to complete the restricted action.

Continue after saving

After a non-closing save, continue with the saved task. The saved task is where its status, child tasks, activities, comments, attachments, and modification history can be continued.

Prerequisites

- You selected **Save**, or you located the task from [Manage tasks from My Desk](#).

Steps

1. Open the saved task after selecting **Save**.
2. Select the saved-task tab that matches the next piece of work: **Sub-tasks**, **Activities**, Comments, **Attachment**, or **Last Modifications**.
3. For broader workspace task work, open [Manage tasks from My Desk](#).
4. For task-related activity work, open [Record activities from My Desk](#) or [Create an activity](#).

Result: You are at the saved task or at the sibling page that owns the next follow-up job.