

Manage tasks from My Desk

September 10, 2026

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A My Desk task is a follow-up item you manage independently of a sales job. Use the standalone task list for work you want to find by **All** or **My Tasks**. Use the sales-job task surface when the task must stay with a saved sales job.

If you need to...	Go to...
Choose between all tasks and your tasks	Filter and act on tasks
See completed work	Filter and act on tasks
Create a task from My Desk	Open My Desk task work
Fill in and save a new task	Create and complete a task
Handle a required-field, save, delete, or loading message	Resolve errors and continue
Keep the task with a saved sales job	Sales job comments and tasks

Before you start

The Tasks subscription and your user type determine whether My Desk task work is available.

A new task uses the task form; an existing task can show additional task tabs and controls.

The owner rule determines whether you can save or delete.

Prerequisites

- Sign in as a non-principal user with the Tasks subscription available.
- For a new task, open the in-workspace new-task form.
- For an existing task, open a saved task with a task ID.

- To save or delete an existing task, be its owner and meet the control's owner condition.

Open My Desk task work

Select **Tasks** to open My Desk task work. The task list appears under **Tasks** in the My Desk workspace.

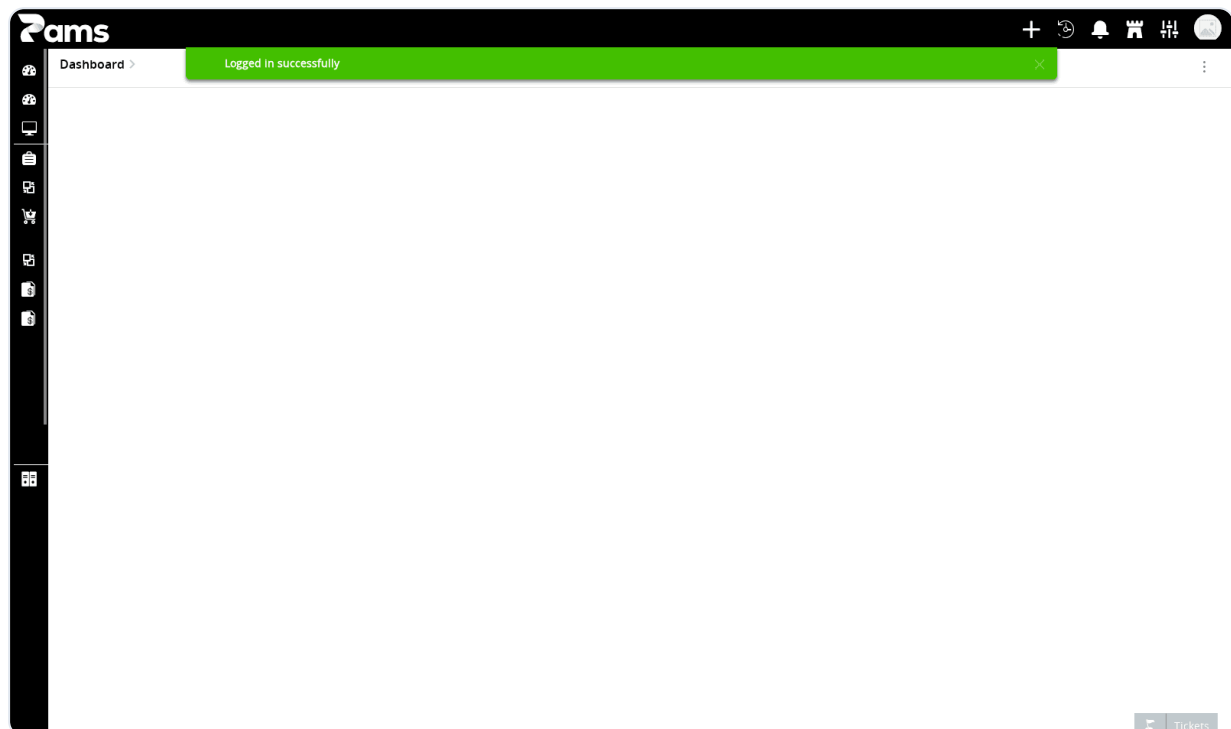
Prerequisites

- Sign in as a non-principal user with the Tasks subscription available.

Steps

1. Open the My Desk workspace.
2. Select **Tasks**.
3. Choose the task surface you need.

If you need to...	Select or open...
Review the standalone list	The task list that appears under Tasks
Start a task from My Desk	The plus control shown beside the Tasks tab
Open a task already in the list	The task row's Open action



Result: The standalone task list is open, or the in-workspace new-task surface is open for the task you want to create.

Understand the task screen

The task list lets you choose a task view and act on a row. The new-task surface collects the task's priority, title, description, dates, progress, and assignee.

The main task list displays these headers:

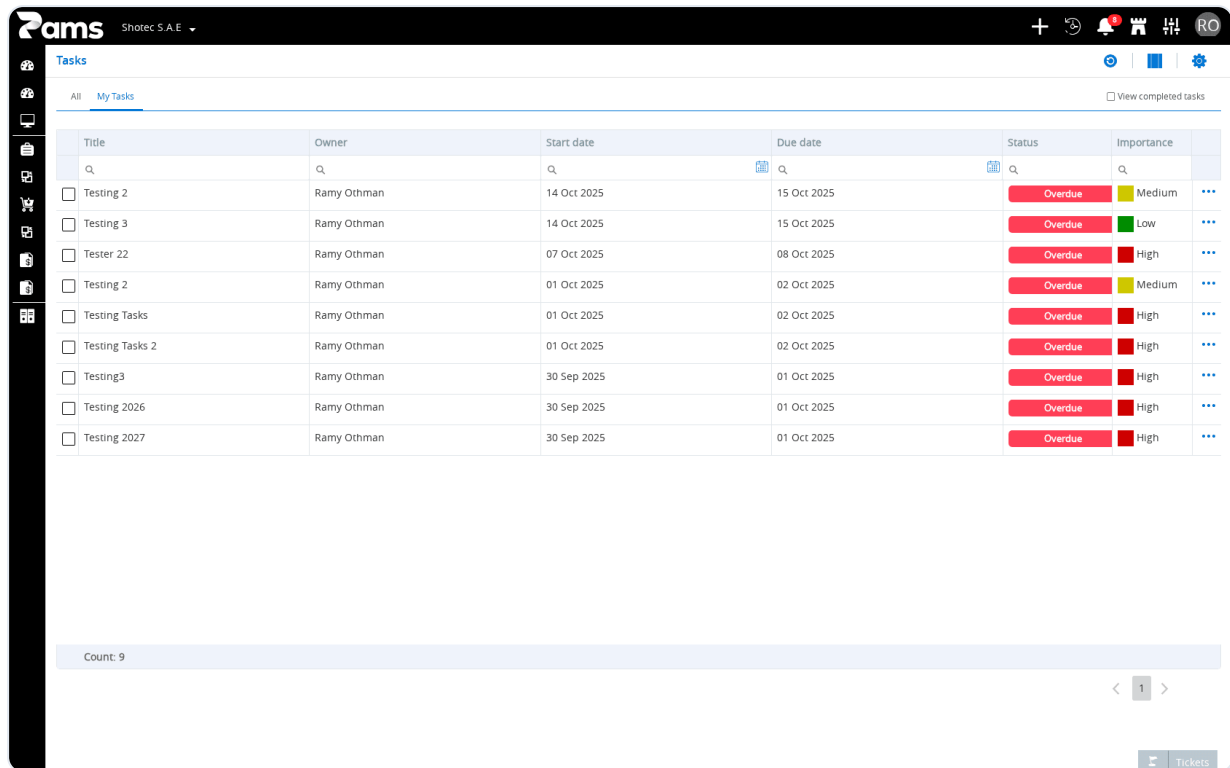
What you use it for	Header or control
Choose all available task rows	All
Choose your task rows	My Tasks
Include completed work	View completed tasks
Read the task row	Title, Owner, Start date, Due date, Status, Importance
Refresh or change the list presentation	Refresh, Table Layout, Settings

The columns visible in the list follow the selected list layout. Work from the headers you see in your list.

The new-task surface contains these fields:

Field	Rule or condition
Task Purpose	Required task title field
Priority	Required
Owner	Task owner shown on the form
Tags	Available task relationship field
Description	Optional
Start Date	Required
Due Date	Required; it cannot be earlier than Start Date
Task Progress	Optional progress value
Assign To	Optional single assignee
Reminder	Available for an existing task with a task ID

The **Following** option, **Follow** control, and priority, status, creator, and owner filters are not part of this task surface. Existing tasks can also show **Sub-tasks**, **Activities**, **Comments**, **Attachment**, and **Last Modifications**. Use **Sub-tasks** for work under a parent task, **Activities** for related activity work, **Attachment** for saved-task files, and **Last Modifications** for the task history.



Title	Owner	Start date	Due date	Status	Importance
Testing 2	Ramy Othman	14 Oct 2025	15 Oct 2025	Overdue	Medium
Testing 3	Ramy Othman	14 Oct 2025	15 Oct 2025	Overdue	Low
Tester 22	Ramy Othman	07 Oct 2025	08 Oct 2025	Overdue	High
Testing 2	Ramy Othman	01 Oct 2025	02 Oct 2025	Overdue	Medium
Testing Tasks	Ramy Othman	01 Oct 2025	02 Oct 2025	Overdue	High
Testing Tasks 2	Ramy Othman	01 Oct 2025	02 Oct 2025	Overdue	High
Testing3	Ramy Othman	30 Sep 2025	01 Oct 2025	Overdue	High
Testing 2026	Ramy Othman	30 Sep 2025	01 Oct 2025	Overdue	High
Testing 2027	Ramy Othman	30 Sep 2025	01 Oct 2025	Overdue	High

Result: You can identify the list view, the row information, the available row menu, and the fields used to create or update a task.

Filter and act on tasks

Use the task list when you need to choose a working set or act on a task row. **All** shows the all-task view, while **My Tasks** shows your task view.

Prerequisites

- Open the standalone task list.
- Know whether you need the all-task view, your task view, or completed work.

Steps

1. Select the task view that answers your question.

If you need to...	Select...
Work across the all-task view	All
Work with your assigned task view	My Tasks
Include completed work	View completed tasks

2. Select the row completion checkbox to change the task's completion state.
3. Open the task-row menu.
4. Select one of the following options.

If you need to...	Select...
Open the task	Open
Complete an incomplete task	Complete
Return a completed task to an incomplete state	Un complete
Remove a task you own	Delete

The screenshot displays the 'My Desk' interface in the PAMS system. The top navigation bar shows the 'ams' logo and 'Shotec S.A.E.' text. Below the navigation bar, the 'My Desk' section is visible, featuring tabs for 'Lists', 'Graphs', 'Tasks', 'Activities', and 'Calendar'. The 'Tasks' tab is selected, showing a table of tasks. The table has columns for Title, Owner, Start date, Due date, Status, and Importance. The tasks listed are 'Testing 2', 'Testing 3', 'Tester 22', 'Testing 2', 'Testing Tasks', 'Testing Tasks 2', 'Testing3', 'Testing 2026', and 'Testing 2027'. All tasks are marked as 'Overdue' and have a status of 'High'. The interface also includes a sidebar with various icons and a bottom bar with a 'Count: 9' and a 'Tickets' button.

Result: The selected task view is displayed, or the task opens, changes completion state,
or is prepared for deletion.

Create and complete a task

Create a standalone task from My Desk when the follow-up work does not belong with a saved sales job.

The form requires a priority, task title, start date, and due date before it can save.

Prerequisites

- Open the new-task surface from the My Desk **Tasks** tab.
- Have the task title, priority, start date, and due date ready.

Steps

1. Enter the task title in **Task Purpose**.
2. Select a value in **Priority**.
3. Enter tags in **Tags**.
4. Enter optional detail in **Description**.
5. Set **Start Date**.
6. Set **Due Date** to the start date or a later date.
7. Set **Task Progress** when the task is already partly complete.
8. Select an optional person in **Assign To**.
9. Choose how to save the task.

If you need to...	Select...
Save and continue working on the task	Save
Save and leave the task surface	Save and Close

10. Open the saved task when **Save** keeps it on screen.
11. Select **Consider As Complete** when the task is overdue or due to start and you are marking it complete.
12. Select **Consider As Not Completed** when a completed task needs its date-based status recalculated.

The new-task defaults set **Task Progress** to **0** , **Start Date** to the current date, and **Due Date** to the next date. Saving a valid task displays **Data saved Successfully** . **Save** keeps a newly saved task open; **Save and Close** leaves the page.

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My Desk > Task > New

Task Purpose

Priority High

Enter...

Owner Ramy Othman

Start Date 07 Sep 2026

Due Date 08 Sep 2026

Tags +

Description

Task Progress 0%

Assign To Select...

Save Save and Close X

Tickets

ams Shotec S.A.E

My Desk > Task > New

Task Purpose

Priority High

Enter...

Owner Ramy Othman

Start Date 07 Sep 2026

Due Date 08 Sep 2026

Tags +

Description

Task Progress 0%

Assign To Select...

Save Save and Close X

Tickets

Result: The task is saved, remains open for further work or leaves the page according to the save choice, and can be marked complete from its task controls.

Handle task branches

Task controls change with the task's owner, assignment, completion state, and whether the task already has an ID. The Tasks subscription and user type also determine whether the standalone surface is available.

Prerequisites

- Open a task or the new-task surface.
- Check the task state shown on the task surface before selecting an action.

Steps

1. Accept or decline an assigned task that you own and have not accepted.

If you need to...	Select...
Take the assigned task	Accept
Return the assignment to the creator	Decline

2. Choose the save action that matches your next task.

If you need to...	Select...
Save and continue working on the task	Save
Save and leave the task surface	Save and Close

3. Open **Reminder** on an existing task with a task ID.
4. Select the existing-task surface that matches the related work you need.

If you need to...	Select...
Work under a parent task	Sub-tasks
Work with related activities	Activities
Read or add task discussion	Comments
Work with saved-task files	Attachment
Review task history	Last Modifications

5. Use the standalone task surface only when the Tasks subscription is available and you are not a principal user.

Result: The controls shown for the task's assignment, ownership, saved state, and subscription state determine the next available action.

Resolve errors and continue

Use the message on screen to correct the immediate task problem before trying the action again.

What you see	What to do
Priority is required	Select a value in Priority .
Title is required	Enter a task title in Task Purpose .
Start Date is required	Set Start Date .
Due Date is required	Set Due Date .
Error Saving Registration	Check the required fields and select Save again.
Only task owner can take that action	Continue with an action available to the task owner.
You accepted the assigned task	Continue working with the accepted task.
You declined the assigned task	Continue with the task returned to its creator.
Are you sure you want to delete this task?	Confirm the deletion only when the task is the one you intend to remove.
Task deleted successfully	Continue with the task list.
Error while deleting task	Remain on the task list and retry the delete action when the task is available.
Data Loading Error	Use Refresh and check the task list again.

Result: You have a correction for the message shown and a next task surface to use.

What happens next

After saving, continue with the saved task or leave the page with **Save and Close**.
Change

its status with **Consider As Complete** or **Consider As Not Completed** according to the task's current dates and completion state.

For job-filtered work, use [Sales job comments and tasks](#), which keeps related follow-up tasks with a saved sales job.

Result: You know whether to continue in the standalone task surface or move to the sales-job task surface.