

Tasks and activities

September 11, 2026

Tasks and activities

Tasks and activities at a glance

A task is a piece of follow-up work with an owner, dates, a status, and an importance value. An activity is a Visit, Meeting, Call, or Mail record used to keep follow-up work visible. .

Use the lists after the main work that creates the follow-up: use Tasks for work that needs an owner and a due date, and use Activities for contact or communication work that needs to remain visible. .

If you need to...	Go to
Review assigned or shared follow-up work	Work with tasks
Review a Visit, Email, Meeting, or Call	Work with activities
Understand the list headers and row information	Understand the lists
Create a task	Create a task
Create an activity	Create an activity
Understand activity statuses	Activity status
Use the broader task workspace	My Desk tasks
Use the broader activity workspace	My Desk activities

Before opening a list, check the conditions in [Before you start](#).

Before you start

Prerequisites

Have this ready	Why it matters
Access to the Tasks or Activities feature	The list and its actions are gated by the feature subscription.
A list with its columns visible	Actions in a row menu require the list to have a usable layout.
The correct branch and ownership context	Task and activity actions check branch membership and ownership before they are offered.
A row in the appropriate state	Complete applies to a task that is not complete; Un complete applies to a completed task.

List filters and actions in a row menu appear only when the applicable list, layout, branch, and ownership conditions are met. Activity deletion also requires a non-Mail activity.

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With those conditions in place, continue to [Find the task or activity list](#).

Find the task or activity list

Tasks and Activities are lists of follow-up records. Open the list that matches the work you need to review. .

Open and filter a list

Open the appropriate list to locate existing follow-up work.

Prerequisites

- Know whether you are looking for a task or an activity.

Steps

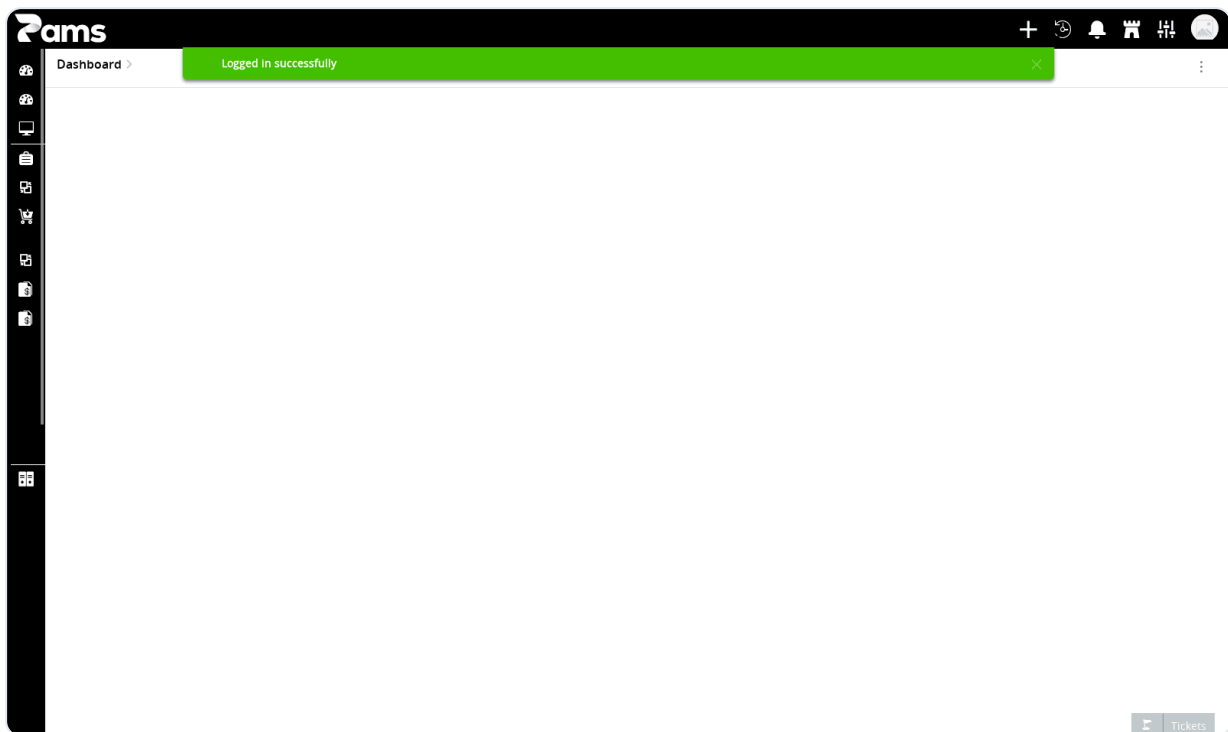
1. Open the Tasks list when you need task follow-up work.
2. Select one task-list option from the table.

If you need to...	Select
Review every task in the list	All
Review tasks assigned to you	My Tasks
Review completed task work	View completed tasks

3. Open the Activities list when you need activity follow-up work.

4. Select one activity-list option from the table.

If you need to...	Select
Review every activity type	All
Review visits	Visits
Review email activities	Email
Review meetings	Meetings
Review calls	Call
Include archived activities	Show archived activities



Title	Visitors	Activity purpose	Company	Startdate	Status	Importance
kknmm,	Heba Said	Technical Opening Technic...		17 Aug 2026 - 12:31 PM	Overdue	Medium
dfgdggfgdgd	Said Hamza, Ragy Zaky			13 Aug 2026 - 11:38 AM	Overdue	Medium
sdasdasd	Ragy Zaky		ACOD-MASAFEE	13 Aug 2026 - 10:04 AM	Overdue	Medium
Follow up visit to ERC	Omar Dighedy	Follow Up Follow Up	ERC	3 Aug 2026 - 12:25 PM	Overdue	Medium
test2	Fatma2 Mohamed			26 Jul 2026 - 02:00 PM	Overdue	Medium
TETET	Ragy Zaky			23 Jul 2026 - 01:26 PM	Overdue	Medium
dasdadsasss	Said Hamza, Fatma2 Moha...			2 Apr 2026 - 06:18 AM	Overdue	Medium
.....	Fatma Sokar	Follow Up Follow Up	abc	10 Dec 2025 - 07:57 AM	Overdue	High
...	Fatma Sokar			9 Dec 2025 - 10:17 PM	Overdue	Medium
jnhv	Fatma Sokar	Project Meeting Project Me...		9 Dec 2025 - 09:58 PM	Overdue	Low
.....JHFEJFDIEWYGFILUEGK...	Fatma Sokar			8 Dec 2025 - 08:56 AM	Overdue	Medium
J25.1104 Test the Visit	Ramy Othman, Ragy Ali	Procurement Procurement		12 Nov 2025 - 07:51 AM	Overdue	Medium
VI AC in My Desk	Ramy Othman			11 Nov 2025 - 07:32 AM	Overdue	Medium

Result: The selected list displays the follow-up records for the option you chose.

Read the headers and row values next in [Understand the lists](#).

Understand the lists

The Tasks list shows task work in rows. The Activities list groups activity work by type and status. The headers tell you which part of a follow-up record each value represents. .

Tasks list

The Tasks list currently shows these headers:

Header	What it identifies
Title	The task's purpose.
Owner	The person responsible for the task.
Start date	When the task starts.
Due date	When the task is due.
Status	The task's current status.
Importance	The task's importance value.

The list also shows the buttons **Refresh**, **Table Layout**, and **Settings**. .

The completed-task view can contain rows with **Completed** status. .

Activities list

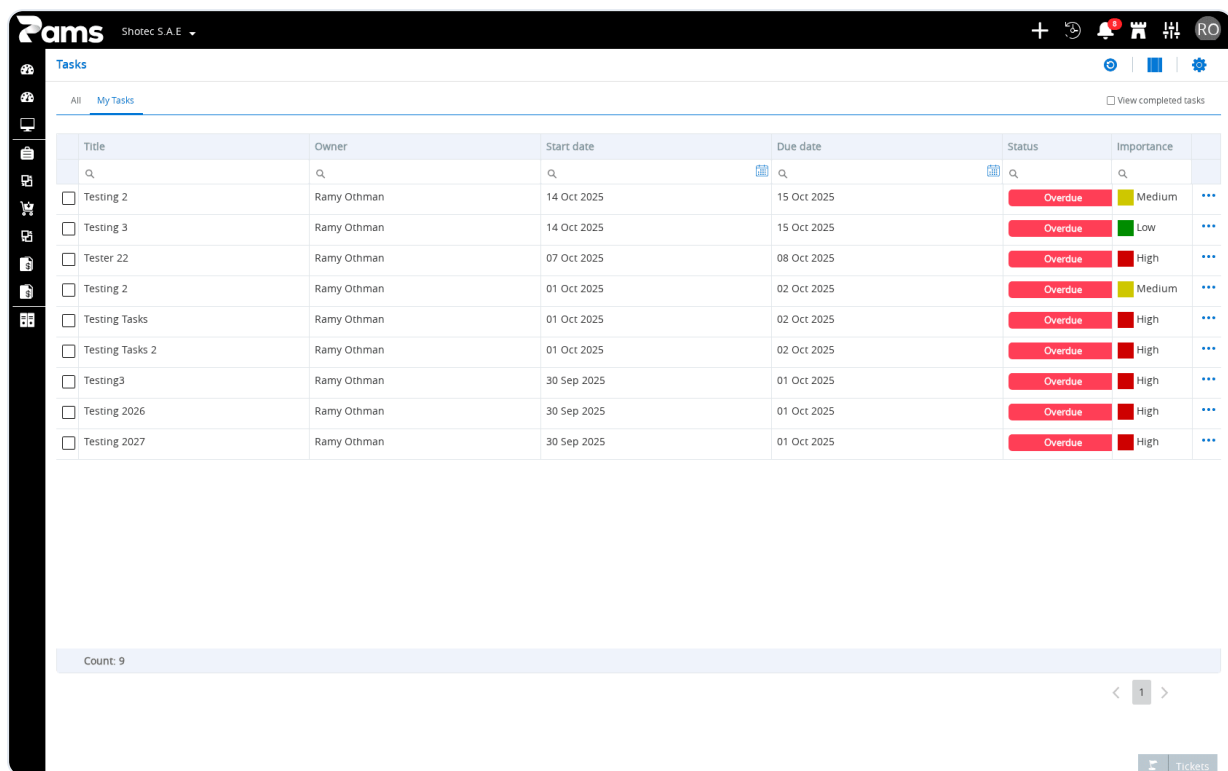
Activity status values are **Planned** , **Overdue** , **Done** , **Due** , and **Cancelled** .

Use the status value in a row to understand whether the activity is upcoming, due, late, finished, or cancelled. .

Activity types include All, Visits, Email, Meetings, and Call. .

The list layout can determine which activity columns appear. Work from the headers visible in your list rather than expecting a fixed set of activity columns. .

The list screens do not present a form for entering task or activity details. Use [Create a task](#) or [Create an activity](#) when you need to enter a new record. .



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	...

Count: 9

< 1 >

Tickets

Work with tasks

For task work, choose a filter before opening an action in a task row. .

Filter tasks and review completed work

Prerequisites

- Open the Tasks list.
- Open a task list with its columns visible.

Steps

1. Select one task filter.

If you need to...	Select
Review all task rows available to the list	All
Review task rows assigned to you	My Tasks
Review completed task work	View completed tasks

2. Read Status and Importance in the row before choosing an action.

The screenshot shows the PAMS (Project and Asset Management System) interface. The top navigation bar includes the PAMS logo, the user 'Shotec S.A.E.', and various icons for navigation and settings. The main content area is titled 'Tasks' and shows a list of tasks under the 'My Tasks' filter. The tasks are displayed in a table with columns: Title, Owner, Start date, Due date, Status, and Importance. All tasks are marked as 'Overdue' in red. The importance levels are Medium (yellow), Low (green), and High (red). The tasks listed are: Testing 2, Testing 3, Tester 22, Testing 2, Testing Tasks, Testing Tasks 2, Testing3, Testing 2026, and Testing 2027. At the bottom, there is a 'Count: 9' and a pagination control showing '1' of 1 page.

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: The Tasks list shows the task set selected by the filter, with Status and Importance available in the row.

When you are ready to act, continue with [Use an action in a task row](#).

Use an action in a task row

Prerequisites

- Open the action menu in a task row.
- Belong to the same branch as the task when the action requires it.
- Be the task owner when the action requires ownership.

Steps

1. Select one action in the task row menu.

If the task is...	Select
Not complete	Complete
Complete	Un complete
Owned by you and in your branch	Delete
Ready for list export and the action is displayed	Export

Result: The selected task-list action is applied when its row and workspace conditions allow it. .

For contact follow-up, continue with [Work with activities](#).

Work with activities

For activity work, filter by type before reviewing status or taking an action in a row.

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Filter activities and include archived work

Prerequisites

- Open the Activities list.

Steps

1. Select one activity type from the table.

If you need to...	Select
Review every activity type	All
Review visits	Visits
Review email activities	Email
Review meetings	Meetings
Review calls	Call

2. Select **Show archived activities** when archived activity records belong in the list.
3. Read the activity's Status value after the list refreshes.

Result: The Activities list shows the chosen activity type and includes archived records when **Show archived activities** is selected. .

To remove an eligible activity, continue with [Delete an activity](#).

Delete an activity

Prerequisites

- Open the action menu in an activity row.
- Belong to the same branch as the activity.
- Own the activity.
- Confirm that the activity is not a Mail activity.

Steps

1. Select **Delete** for an activity in your branch that you own and that is not a Mail activity.

Result: The activity deletion action starts when the row satisfies the branch, type, and ownership conditions. .

If the action is unavailable, use [When list work goes wrong](#).

When list work goes wrong

Use the message text below to identify the condition that stopped an action. The task list can also fail silently when its action path does not provide a success or error message.

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What you see	What it means	What to do
Only task owner can take that action	The task action requires the task owner.	Open the task as its owner or use an action available to your role.
Task deleted successfully	The task deletion completed.	Return to the list and locate the remaining task rows.

What you see	What it means	What to do
Error while deleting task	The task deletion did not complete.	Check the task's ownership and branch conditions before trying again.
Action not allowed	The activity action is not permitted.	Check the activity's branch, type, and ownership conditions.
Forbidden characters detected. Please remove them and try again.	The activity action received forbidden characters.	Remove the forbidden characters and submit the action again.
Your request was completed successfully	The activity request completed.	Continue with the updated Activities list.
NO Data to Export	The export action found no data to export.	Apply a list filter that returns rows, then select Export when it appears.

The following messages belong to the linked creation and mail procedures:

Owning page	Message
New activity	This action is only allowed if you belong to that branch
New activity	One topic and at least one note is required
New activity	There is no topic to print
New activity	Data saved Successfully
Mail activity	Email Sent successfully

What to do next

When you need a new follow-up record, use [Create a task](#) or [Create an activity](#). When you need to interpret an activity's lifecycle value, use [Activity status](#). .

For the wider work area, continue to [My Desk tasks](#) or [My Desk activities](#). .