

Tasks — Learning Path

September 11, 2026

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Learning Paths › Tasks

This learning path is for team members who use the Tasks app to review, organize, and maintain task records. You will learn how to orient yourself in the Tasks workspace, work with individual task records during daily follow-up, and perform periodic reviews to keep task information current.

Learning objectives

- By the end of this path you can navigate from the Tasks workspace to task information.
- By the end of this path you can locate and open a task for review.
- By the end of this path you can review and maintain information on a Tasks record.
- By the end of this path you can use the task workspace to support daily work prioritization.
- By the end of this path you can perform a structured periodic review of task records.

Prerequisites

- Access to the Tasks app.
- Permission to view task information and, where required, update Tasks records.
- Familiarity with your organization's task-assignment and follow-up practices.

Module 1: Get oriented in the Tasks workspace

Goal: Learn where task work begins and how to move from the workspace into task information.

Lesson 1.1: Start your task-working session

When you need to begin a day of task follow-up, start in the [Tasks](#) workspace. Use this screen as your entry point for task-related work and to establish the context for the tasks you need to review.

From [Tasks](#), move into [tasks](#) to work with the available task information rather than relying on task details from outside the app.

Practice task: Open [Tasks](#) and navigate to [tasks](#).

Lesson 1.2: Move from task information to the individual record

When a task needs closer attention, use [tasks](#) to identify the task you want to inspect. Open the relevant item to access its [Tasks](#).

Use the record screen when you need to understand or maintain the information for one specific task, rather than reviewing tasks at a broader level.

Practice task: From [tasks](#), open one task and reach its [Tasks](#).

Module 2: Handle daily task follow-up

Goal: Review individual tasks consistently and keep their records aligned with your current work.

Lesson 2.1: Review a task before acting on it

When you are about to work on a task, first locate it in [tasks](#) and open its [Tasks](#). Review the record information available on that screen so that your follow-up is based on the current task record.

After reviewing the record, return to the task workspace as needed to continue with other task work.

Practice task: Choose a task from [tasks](#), open its [Tasks](#), and review its available information before leaving the record.

Lesson 2.2: Maintain task information as work changes

When task information needs to be updated during follow-up, open the relevant [Tasks](#). Make the permitted changes required by your work process, then return to [tasks](#) to continue reviewing other tasks.

Keeping updates within the individual record helps ensure that the task workspace reflects the latest information available to your team.

Practice task: Open a task's [Tasks](#) and make an authorized update according to your organization's task process.

Module 3: Run a periodic task review

Goal: Use the Tasks app to systematically review work that may need attention and maintain accurate records.

Lesson 3.1: Review tasks as a set

During a scheduled review, begin in [Tasks](#) and move to [tasks](#). Work through the task information using a consistent approach: identify a task, open its record, review it, and then return to the task workspace for the next item.

This repeatable cycle helps you review task work without losing track of where individual updates belong.

Practice task: Starting from [Tasks](#), review two task entries by opening each one from [tasks](#).

Lesson 3.2: Resolve record-level follow-up identified during review

If your periodic review identifies a task that needs record-level attention, open the task's [Tasks](#). Review the available task information, make any authorized maintenance updates, and then return to [tasks](#) to continue the review.

Use the record screen for individual-task decisions; use the task workspace to manage the overall review flow.

Practice task: Identify one task during a review in [tasks](#), open its [Tasks](#), and complete an authorized record review.

Final assessment

1. You are starting your morning task follow-up and need the correct entry point for task work. Which screen should you open first, and where do you go next to work with task information?
2. You find a task that requires closer inspection than the broader task workspace provides. Which screen should you open, and why?
3. During daily follow-up, you determine that information for one task must be maintained. Describe the screen sequence you should use.

4. You are conducting a periodic review of several tasks. What repeatable workflow should you follow to review each task without treating the workspace as the place for all record-level work?
5. After reviewing one individual task, you need to continue reviewing other tasks. Which screen should you return to, and what is the benefit of doing so?

Answers

1. Open **Tasks** first, then go to **tasks**; this begins in the app workspace and moves into task information.
2. Open the **Tasks**; it is the screen for reviewing information for one specific task.
3. Go from **tasks** to the relevant **Tasks**, then make the authorized record update; maintenance belongs with the individual task record.
4. Start in **Tasks**, review tasks in **tasks**, open each relevant **Tasks**, and return to the task workspace for the next task; this separates overall review from record-level follow-up.
5. Return to **tasks**; it lets you continue working through the broader set of tasks after completing an individual record review.