Tasks—Advanced

A task is a discrete work item that a single person can be assigned. Tasks can be organized into lists that display a collection of tasks in relation to a project.

Add a workflow to a task

1. From the site page, select Site Contents.
2. Locate and select the appropriate Task app.
3. Select the List tab.
4. In the Settings group, select the Workflow Settings drop-down.
5. Click Add A Workflow.
6. From the Run On Items Of This Type drop-down, select Task.
7. In the Select A Workflow Template list box, select the appropriate template.
8. In the Enter A Unique Name For This Workflow field, enter the appropriate name.
9. From the Select A Task List drop-down, select the appropriate task.
10. From the Select A History List drop-down, select the appropriate option.
11. In the Start Options area, select the appropriate checkboxes.
12. Click Next.
13. From the Select A Choice Field drop-down, select the appropriate option.
14. From the Initial State drop-down, select the appropriate state.
15. From the Middle State drop-down, select the appropriate state.
16. From the Final State drop-down, select the appropriate state.
17. You must specify the details you want to happen when a workflow is initiated.
18. In the Task Details area, select the appropriate options for the started workflow.
19. In the Task Details area, select the appropriate options for workflow changes in the middle state.
20. Click OK.

Add tasks to a timeline

1. If your tasks include due dates, it will appear on your timeline.
2. If the task has both a start and due date, it will span those dates on the timeline. If it only has a due date, it will appear as a diamond on the timeline.
3. From the site page, click Site Contents.
4. Click the appropriate Task List.
5. Select the appropriate task.
6. Click the Tasks tab.
7. In the Actions group, click Add To Timeline.

Add a file to a task

1. In the left navigation pane, click Site Contents.
2. Click the appropriate Task List.
3. Select the appropriate task.
4. Click the Tasks tab.
5. In the Actions group, click Attach File.
6. Click Browse.
7. Locate and select the appropriate file.
8. Click Open.
9. Click OK.

Indent or outdent selected tasks

1. In the left navigation pane, click Site Contents.
2. Click the appropriate Task List.
3. Select the appropriate task.
4. Click the Tasks tab.
5. To indent the task, click Indent.
6. To outdent the task, click Outdent.
7. Click Stop.

Show or hide subtasks

1. In the left navigation pane, click Site Contents.
2. Locate and select the appropriate Task List.
3. If a task includes a subtask, the task will appear in bold and a small arrow will display next to the task.
4. To show the subtask, click the white arrow.
5. To hide the subtask, click the black arrow.

View the version history of a task

1. Before viewing the version history of a task, you must first change your settings to create a new version each time an item is edited.
2. In the left navigation pane, click Site Contents.
3. Click the appropriate Task List.
4. Click the List tab.
5. In the Settings group, click List Settings.
6. In the General Settings area, click Versioning Settings.
7. Under Create A Version Each Time You Edit An Item In This List, select the Yes radio button.
8. Click OK.

If you need more help, please reach out to your division's FSSA Super User or send an email to SharepointRequests@fssa.in.gov with a description of your issue.

9. Click Site Contents.
10. Click the appropriate Task List.
11. Select the appropriate task.
12. Click the Tasks tab.
13. In the Manage group, click Version History.

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