

Managing Your Tasks

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The screenshot shows the Goldilocks Projects Tasks module interface. On the left is a sidebar with navigation options: Dashboard, Projects, Milestones, Tasks (highlighted), and Activities. The main content area is titled "Tasks" and includes a sub-header "View and manage all tasks across projects". At the top right of the main area are buttons for "+ Add Task" and "Generate Report". Below this are four status cards: "All Tasks" (0), "To Do" (0), "In Progress" (0), and "Done" (0). A "Search & Filters" section follows, with a search bar and dropdown menus for Project (All Projects), Milestone (All Milestones), Assignee (All Assignees), Priority (All Priorities), and Status (All Statuses). Below the filters, it says "Showing 0 of 0 tasks" and has toggle buttons for "Table" and "Cards". A large dashed box contains a "No Tasks Found" message with the subtext "No tasks match your current filters."

The Tasks module is where you manage individual work items to ensure your projects stay on schedule. This section provides a centralized view of all to-dos across your various initiatives.

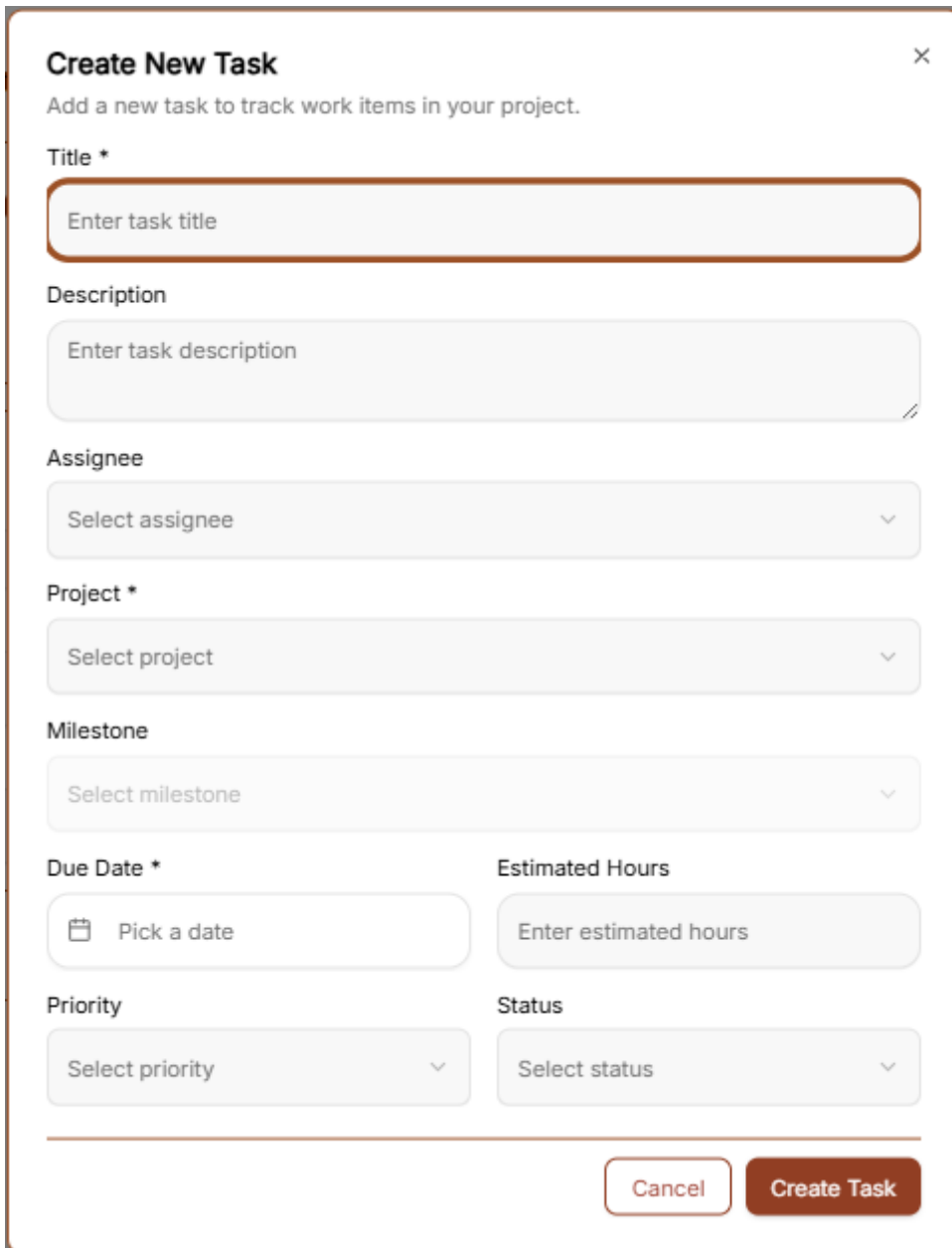
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The Tasks page allows you to organize and filter your workload to stay focused on high-priority items:

- **Navigation:** Click on Tasks in the left-hand sidebar to view and manage all tasks across your workspace.
- **Status Overview:** Four status cards at the top of the page provide a real-time count of your tasks:
 - **All Tasks:** Total number of work items.
 - **To Do:** Tasks that have not yet been started.
 - **In Progress:** Tasks currently being worked on.
 - **Done:** Completed tasks.
- **Search & Filters:** You can search for specific tasks by name or description and filter the list by Project, Milestone, Assignee, Priority, and Status.
- **View Options:** Toggle between a Table or Cards view to change how tasks are displayed.

Important: Before creating tasks, you first need to create a project. All tasks must be assigned to an existing project to ensure they are properly tracked and organized.

How to Create a Task



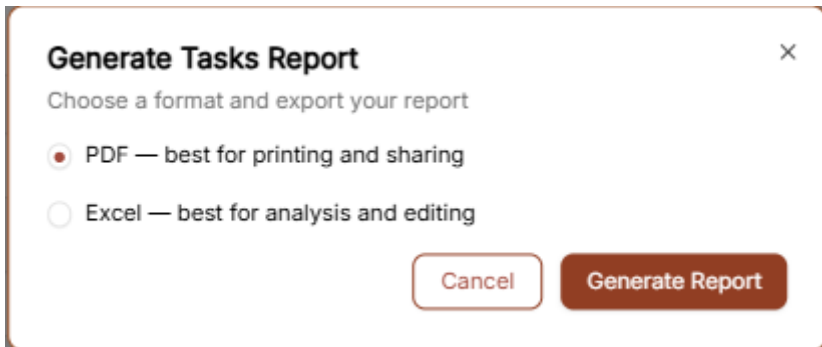
The screenshot shows a 'Create New Task' modal window. At the top, it says 'Add a new task to track work items in your project.' Below this are several input fields: 'Title *' (required), 'Description', 'Assignee' (dropdown), 'Project *' (required, dropdown), 'Milestone' (dropdown), 'Due Date *' (required, date picker), 'Estimated Hours' (text input), 'Priority' (dropdown), and 'Status' (dropdown). At the bottom right, there are two buttons: 'Cancel' and 'Create Task'.

To add a new work item, click the brown "+ Add Task" button in the top right corner to open the creation form:

- Title *: Enter a clear name for the task (Required).
- Description: Provide details about what needs to be done.
- Assignee: Use the dropdown to select which team member is responsible for the task.
- Project *: Select the project this task belongs to (Required).

- Milestone: Optionally link the task to a specific project milestone.
- Due Date *: Select the deadline for this task (Required).
- Estimated Hours: Enter the predicted time required to complete the task.
- Priority: Set the urgency level (e.g., Low, Medium, High).
- Status: Set the current phase of the task (e.g., To Do, In Progress).
- Create Task Button: Click the brown button to save the task to your project.

Exporting Task Data



Generate Tasks Report ×

Choose a format and export your report

PDF — best for printing and sharing

Excel — best for analysis and editing

Cancel Generate Report

Click the "Generate Report" button to export your task list. You can choose between two formats:

- PDF: Best for printing and sharing task summaries.
- Excel: Best for detailed analysis and manual editing of task data.

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