

## Manage Tasks in the Workflow Panel

The **Workflow** panel lists the tasks required to complete the case, ordered by milestone.

1. Open a case and navigate to the **Workflow** panel.
2. To complete a task and move the case forward, select a task result from the **Result** drop-down list.

The screenshot shows the 'Workflow' panel with a 'View Graph' button and a list of tasks. The first task, 'Application Check', has a 'Result' dropdown menu highlighted with a red box. Below the tasks is a search bar and a '1-3 of 8' indicator.



**TIP:** You can also complete a task from the **Edit Task** panel or by using **Task Manager**.

Administrators can configure cases to re-insert tasks under certain conditions, and you can manually add tasks as needed.

3. To add a task, click **Add record**.
4. Complete the milestone information, select the desired task or task group, and click **Add**.

The 'Add Task' dialog box is shown with fields for 'Start Milestone' (5) and 'End Milestone' (6). Under 'Insert', the 'Single Task' option is selected. The 'Task' dropdown menu shows 'State Asbestos Report'. There are 'Cancel' and 'Add' buttons at the bottom.

For each task, you can attach documents, add comments, track time, and create checklists.

5. Click **Edit Task** to open the **Edit Task** panel.
6. Select an option at the bottom of the **Edit Task** panel to add or edit information.

The 'Edit Task' panel displays various fields for task information. At the bottom, there are four tabs: 'Checklists', 'Comments', 'Time Accounting', and 'Rel Docs'. The 'Checklists' tab is currently selected and highlighted with a red box.

7. Click **Save** to update the task, and click **Close** to return to the case summary page.

An icon next to the task on the **Workflow** panel indicates there is more information and/or incomplete checklists.



**NOTE:** You must complete any checklists for a task before moving to the next task. See [Complete Checklists](#) in the Respond Guide for Trimble Unity Maintain and Trimble Unity Permit for more information.

The screenshot shows the 'Application Check' task in the workflow. Above the task name are four red circular icons labeled 'a', 'b', 'c', and 'd'. To the right of the task is a 'Result' dropdown menu.

- a. Comments
- b. Checklists
- c. Time Accounting
- d. Related Documents