



SECTION 04

Tasks

If something needs doing by someone, this is where it lives.



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Tasks

Tasks are the work itself. A task can live in a project or stand on its own, and it can carry subtasks, people, dates, dependencies, time, costs, notes, comments, files and risks. Once it exists, it shows up everywhere work is tracked: lists, boards, calendars, timesheets and reports. If something needs doing by someone, this is where it lives.

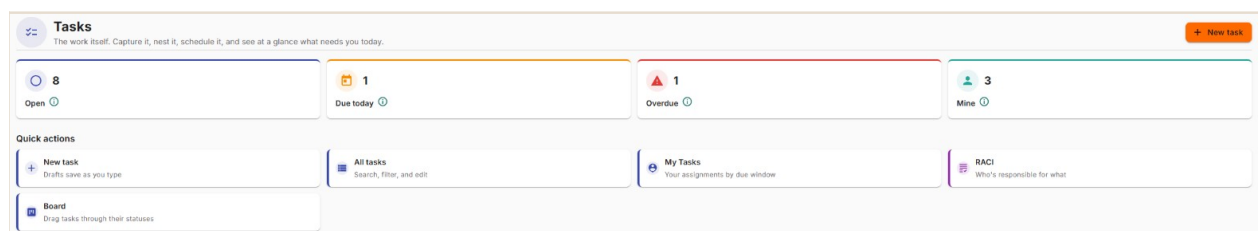
Open **Tasks** in the left menu. Everything in this guide starts there.

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The Tasks page

The first page is a quick read of where things stand, and a door to everything else.



The Tasks page



The four numbers at the top are links:

TILE	WHAT IT COUNTS	OPENS
Open	Every open task you can see, subtasks included	All tasks, every level
Due today	Open tasks due today	All tasks, due today
Overdue	Open tasks past their due date	All tasks, overdue
Mine	Open tasks assigned to you	My Tasks

Hover the small **i** beside a tile to see exactly what it counts.

Quick actions go to **New task**, **All tasks**, **My Tasks**, **RACI** and the **Board**.

All tasks

The full list of tasks you can see.

All tasks, with one task's subtasks open

Reading the list

- The line under the title says what's being counted, like *8 open top-level tasks · 10 in all, subtasks included*.
- Each row shows the status icon, the name, and chips for **status**, **priority**, due date, subtask progress (1/3), project, tags and goal. **Waiting on 1** means another task has to finish first.
- A task with subtasks has an arrow on the left. Click it to see them indented underneath.
- **Show every level** lists every task flat, subtasks included. **Show as a tree** goes back.



- Click a row to open the **quick view** on the right. The expand icon on the row, or **Open full editor** in the quick view, opens the full task.

Adding a task fast

The **Add a task and press Enter** box under the toolbar creates a task with just a name. If you've filtered to a project, the box says so and the new task lands in that project.

Finding tasks

CONTROL	WHAT IT DOES
Search tasks...	Matches the name
Status	One or more statuses
Priority	One or more priorities
Due	Overdue, Due today, This week or No due date
Assignee	One person
Project	One project
Star	Favorites only
Show closed	Includes completed and cancelled tasks, which are hidden by default
Sort	Recent, Due date, Priority, Name or Created. The arrow beside it reverses the order

Every filter in use shows as a chip under the toolbar, and the **x** on a chip removes it. **Clear all** resets everything.

TIP

Your filters live in the address bar. Bookmark it, send it to someone, or use Back and Forward, and the list comes back exactly as it was.

When nothing matches, the list says why and offers the fix: **Clear filters**, or **Show closed** when everything is finished.



Changing several tasks at once

Tick the boxes on the left of the rows. A bar appears above the list:

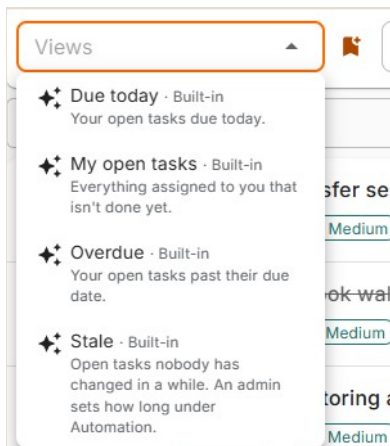


The bar for selected tasks

Set status, Set priority, Assign to, Move to project or Complete the lot in one go. **Clear selection** lets them all go.

Views

A view is a saved set of filters. Pick one from **Views**.



The Views list

- **Built-in** views come with Nexus: *Due today*, *My open tasks*, *Overdue* and *Stale* (open tasks nobody has touched in a while; an administrator sets how long under Automation).
- **Yours** are views you've saved. Set up the filters, then click the **bookmark** icon beside Views to save them. Rename or delete your own from the same place.
- **Shared with everyone** views are visible to the whole workspace. Only administrators create, rename or remove these, and Nexus asks first, because everyone feels the change.

An administrator can also hide a built-in view. Hidden views are listed under **Hidden (N)**, where **Show ... again** brings one back.



My Tasks

Everything assigned to you, grouped by when it's due: **Overdue**, **Today**, **This week**, **Later** and **No date**.

Tasks / My Tasks

My Tasks
3 open assignments

... Show closed + New task

Add a task for yourself and press Enter + Add

Overdue 1

Data migration dry run
Contributor In progress Urgent 1d overdue Helix Platform Migration

Today 1

Coordinate Meridian onsite team
Contributor Not started Medium Due today Helix Platform Migration

Later 1

Knowledge transfer sessions ★
Contributor In progress Medium Waiting on 1 Due Dec 19 9:2 Helix Hypercare and Sa...

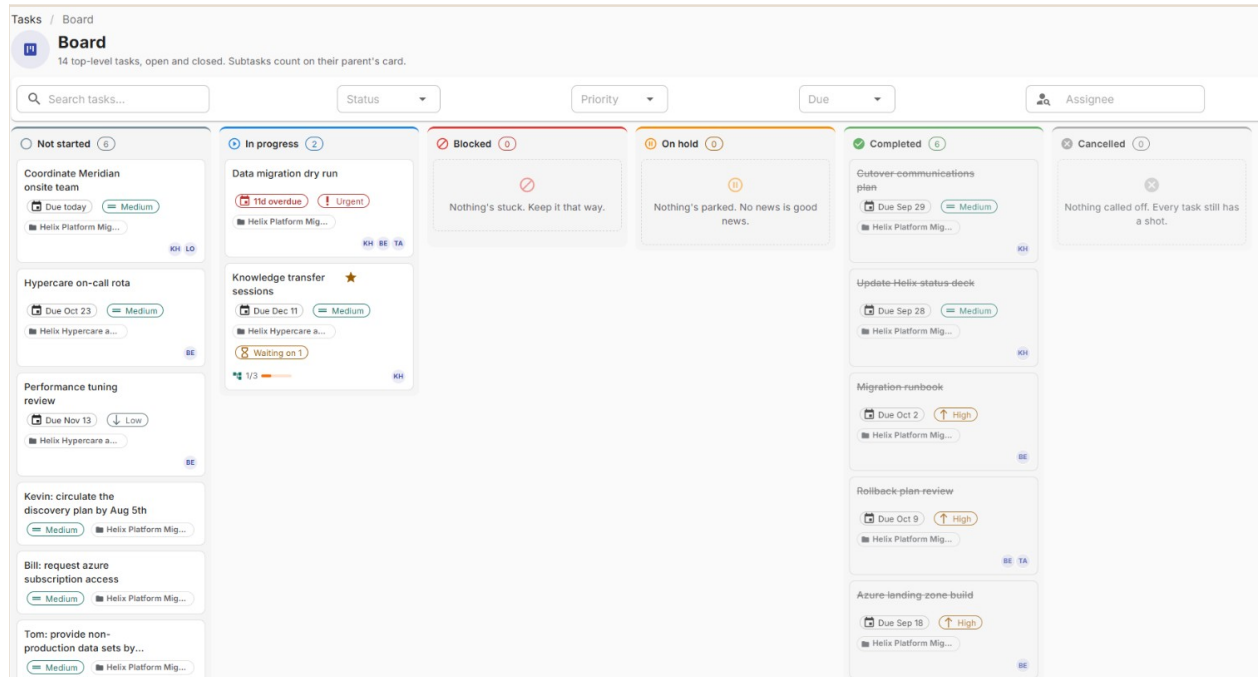
My Tasks

- Each row shows your role on it (**Owner**, **Contributor**, **Reviewer** or **Observer**), its status, priority and due date.
- **Add a task for yourself and press Enter** creates a task and assigns it to you in one step.
- **Show closed** adds a **Closed** group for work you've finished or cancelled.
- Nothing open? The page says how many finished tasks are hidden, with **Show closed**. Take the win.



The board

The board shows tasks as cards, one column per status. **Drag a card to another column to change its status.** If the move can't be saved, the card slides back and a message says why.



The board

- The line under the title says what's on it: top-level tasks, open and closed. Subtasks count on their parent's card.
- Cards show due date, priority, project, *Waiting on*, subtask progress and the people on it.
- An empty column says so with a straight face: *"Nothing's stuck. Keep it that way."*
- The toolbar has **Search**, **Status**, **Priority**, **Due** and **Assignee**, plus **Favorites only** (the star) and the switch between list and board.

On the board of a project that runs **Scrum or Kanban**, there's more:

- **Swimlanes**: by assignee, by priority or by epic.
- **WIP limits**: the tune icon on a column sets how many cards it should hold. A column over its limit is marked. It's advice, not a locked door.
- Each card shows its **work item type** (Story, Bug, Spike, Epic or Task).



Creating a task

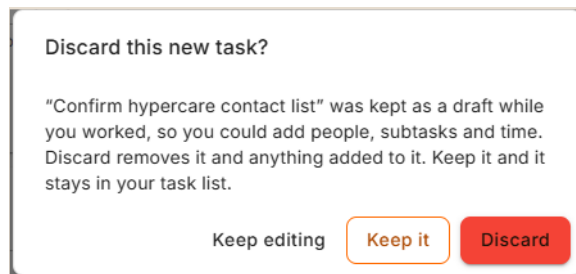
Click **New task**. A **name** is enough to start.

The moment you type, Nexus keeps the task as a **draft**, so you can add people, subtasks and time before you're done. The header says *Draft, not created yet*, and the main button says **Create**.



A new task, still a draft

Leave a draft and Nexus asks what you'd like:



Discard this new task?

- **Keep editing:** back to the task.
- **Keep it:** it stays in your task list.
- **Discard:** it, and anything you added to it, are removed.

NOTE

A new task isn't assigned to anyone until you say so. **Assign me** is one click on the right.



The task editor

The screenshot shows the 'Task editor' interface for a task named 'Knowledge transfer sessions'. The interface is divided into two main sections: a left sidebar for task details and a right sidebar for related information. The left sidebar contains sections for 'Basics' (Name, Description, Status, Priority, Tags, Project), 'Work item' (Type), 'Schedule' (Start date, Due date, Estimated hours, Scheduling rule, Repeat), and 'Subtasks'. The right sidebar contains sections for 'People' (Assignees, Responsibility), 'Plan' (Goal, Milestone, Calendar events, Dependencies), 'Cost and effort' (Time log, Resources and costs), and 'Context' (Notes, Comments, Files). Numbered callouts 1 through 8 point to specific elements: 1. Header (star, menu, close, save); 2. Basics section; 3. Schedule section; 4. Subtasks section; 5. People section; 6. Plan section; 7. Cost and effort section; 8. Context section.

The task editor, with the main areas numbered

- 1 **The header.** The star (favorite), the menu, the exit button, and **Save**.
- 2 **Basics.** Name, description, status, priority, tags and project.
- 3 **Schedule.** Dates, estimate, scheduling rule and repeat.
- 4 **Subtasks.**
- 5 **People.** Assignees and RACI.
- 6 **Plan.** Goal, milestone, calendar events and dependencies.
- 7 **Cost and effort.** Time log, and resources and costs.
- 8 **Context.** Notes, comments, files and risks.

The left side is the task itself. The right side is everything connected to it. A card with nothing in it folds down to one line with **Open**, so the page shows what the task actually has instead of a wall of empty boxes.

Basics

- **Name and Description.**



- **Status:** Not started, In progress, Blocked, On hold, Completed or Cancelled.
- **Priority:** Low, Medium, High or Urgent.
- **Tags:** separate them with commas. Case is ignored, so Q3 and q3 are one tag. The chips under the field show exactly what will be saved.
- **Project:** pick one, or clear it to let the task stand alone. Subtasks move with their parent.

Work item

On tasks in an **agile** project.

- **Type:** Task, Story, Bug, Spike or Epic.
- **Acceptance criteria**, for Story, Bug, Spike and Epic: what has to be true for the work to count as done. Up to 4,000 characters. Click **Save criteria**.
- Change a Story back to a Task and its criteria are **hidden, not lost**. Change it back and they return.

Schedule

- **Start date, Due date and Estimated hours.**
- **As soon as possible** is the scheduling rule. **Set constraint...** changes it, for example to *Must start on a date*.
- **Repeat this task:** completing or cancelling a repeating task creates the next one automatically, with the same people, on the next date.

Subtasks

Type a name and press Enter to add one. Each subtask has its own status and dates. Click its circle to complete it, or its name to open it. The count beside the heading shows how many are done.

Saving, cancelling and leaving

- **Save** keeps your changes. **Ctrl** + **S** does the same.
- The exit button reads **Discard** on a new draft, **Cancel** when you have unsaved changes, and **Close** when there's nothing to lose. It always says what it's about to do.
- **Cancel** puts the fields back and stays on the task. A message offers **Undo** for a few seconds, for the "wait, no" moment.
- Leave with unsaved changes and Nexus asks inside the page, not with a browser pop-up.
- **If someone else saved the task while you were working**, Save stops and says so, with **Reload**. Nothing gets overwritten. Reload, look at their change, then make yours again.



The **:** menu holds **Delete**, which sends the task and its subtasks to the recycle bin, where it stays recoverable.

The right-hand side

People

Assignees. Who's doing the work. **Assign me** adds you; **Add someone** searches people you can see. Each person has a role (**Owner**, **Contributor**, **Reviewer** or **Observer**) that you change from the arrow beside their name.

RACI. Who is **R**esponsible, **A**ccountable, **C**onsulted and **I**nformed.

The RACI card

- Pick the role, search for the person, press Enter.
- There can be only one Accountable person. The card flags an empty key role: *No Responsible* or *No Accountable*.
- Nexus may **suggest** someone from the assignments. You accept or dismiss it; it never adds anyone on its own.
- **Apply a template** (the clipboard icon) fills the roles from a saved pattern.

Plan

Goal and **Milestone.** Link the task to one of each.

Calendar events. Link meetings or events that belong to this task, so they're one click away.



Dependencies. What this task waits for (**Blocked by**) and what waits for it (**Blocking**). **Link a dependency** opens a dialog:

The dialog box is titled "Link a dependency" with a chain-link icon. It features two orange buttons at the top: "← Blocked by" and "Blocks →". Below these, a text label reads "This task waits for the task you pick." A task selection box shows "Data migration dry run" with a play icon and a close icon. Below this is a "Type" dropdown menu set to "Finish to start (FS)". A "Lag (days)" spinner is set to "0". A note states "Positive = wait after; negative = lead (overlap)." An example sentence reads "Knowledge transfer sessions can't start until Data migration dry run finishes." At the bottom are "Cancel" and "✓ Link" buttons.

Link a dependency

- Choose the direction, then type at least two letters to find an **open** task.
- Choose the **type**. The sentence at the bottom explains it with the real task names, so there's no decoding *FS* in your head.
- **Lag** adds days of waiting (positive) or overlap (negative).
- Nexus refuses a link that would make a loop, and names the loop.

Cost and effort

Time log. Log hours against the task: a date, billable or not, and for someone else if you're allowed to (**On behalf of**). The total shows, split by person when more than one has logged time. Entries can be edited or deleted any time, and delete has **Undo**. The Time guide covers the rest.

Resources and costs. People, equipment, materials and contacts linked to the task, with their costs, and the task's **tracked costs** total. Links that carry no cost (a contact, say) are marked **No cost**. Removing a link never deletes the record itself.

If the task uses stock **materials**, completing it asks you to **Confirm materials used**, so the stock count stays honest.

Context

Notes. Notebook pages linked to this task. **+ New linked note** asks for a title, tells you where it will be filed (the project's notebook, or your own **My Notes**), and adds it without leaving the task.



Comments. A running conversation on the task. Edit or delete your own; a deleted comment stays recoverable for a while.

Files. Attach files. Click a file's name to download it.

Risks. What could go wrong. Choose **Probability** (1 Rare to 5 Almost certain) and **Impact** (1 Negligible to 5 Severe), and the score and band (Low, Medium, High, Critical) follow.

Capture a lesson from this task. Files a lesson learned on the task's project. It needs the task to be in a project.

AI access. Shown only when AI is on for your workspace. It controls whether AI features may read this task. **It doesn't change who can see or edit the task.**

Record shows when the task was created and last changed.

The quick view

Click a task in a list or on the board, and a quick view slides in from the right.

The screenshot displays the 'Data migration dry run' task quick view. At the top, the task title is shown with a status of 'In progress' and a note '11d overdue'. Below this, there are dropdowns for 'Status' (set to 'In progress') and 'Priority' (set to 'Urgent'). Start and due dates are listed as '10/1/2026' and '10/5/2026' respectively. The project is identified as 'Helix Platform Migration'. A constraint is set to 'As soon as possible'. The description reads 'Full rehearsal with record-count reconciliation'. Tags include 'data' and 'cutover'. Three assignees are listed: Kevin Haysmer, Bill Everybody, and Tom Alvarez. Below these are sections for 'Goal', 'Milestone', 'Notes', and 'Resources', each with a 'Link' button. A 'Time logged' section shows 'none yet' with a 'Log time' button. A 'Dependencies' section shows 'Blocking' with a link to 'Knowledge transfer sessions'. At the bottom, the creation and modification timestamps are provided, along with an 'Open full editor' button.

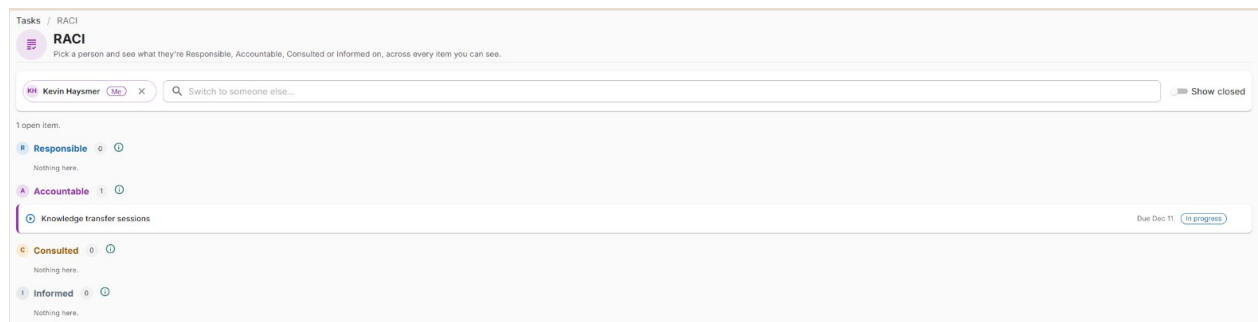
The quick view



Change the status, priority and dates, see the description, tags, assignees, goal, milestone, notes, resources, time and dependencies, and **Log time** without leaving the list. **Open full editor** goes to the whole task.

RACI across everything

RACI, on the Tasks page, answers one question: *what is this person on the hook for?*



RACI for one person

- It opens on **you**. Search to switch to someone else.
- Their items are grouped by **Responsible**, **Accountable**, **Consulted** and **Informed**, each with a count.
- It shows **open work** by default. **Show closed** adds finished items, struck through, at the end.
- Within each role, blocked work comes first, then in progress, then the rest, soonest due first.
- **You only see what you're allowed to see**, even when looking at someone else. Their RACI never shows you a task you couldn't open yourself.

Common questions

Why don't the numbers match the list?

The tiles count subtasks; the list counts top-level tasks unless **Show every level** is on. The line under each title says which.

Where are my finished tasks?

Hidden by default. Turn on **Show closed**.



I created a task and it's not in My Tasks.

A new task isn't assigned to anyone until you say so. Open it and click **Assign me**, or use the add box on My Tasks, which assigns it to you.

Why can't I see the Work item card?

It appears on tasks in an agile project.

Why is there no AI access box?

AI is off for your workspace, or you've opted out of AI features.

I marked a task *Never used by AI*. Can people still see it?

Yes. That setting only controls AI. Who can see a task comes from its project, assignments, RACI and sharing.

Save said the task changed elsewhere. Now what?

Someone saved it after you opened it. Click **Reload**, check their change, and make yours again.

Can I undo Cancel?

Yes, for a few seconds, from the message that appears.

