

Task Steps Table

Task Steps are used to define a multi-step process within a single task rather than creating several tasks. This makes sense especially when the same person is performing all the steps, and when there is no need to track the time it takes for each step to be completed. They can simplify workflows and reduce the overall number of tasks, while providing reminders about steps that should be done.

Individual task steps are linked to a specific task template and can only be used in that template. Task Step records are simple records with a Step Number, Status, Title, Description and link to the Task Template.

Task steps are created from within a task template, as shown below, or they can be created directly with the task template specified. There is no automation on this table.

They appear within task template records as a related table ordered based on the Step Number.

▼ Task Steps

Use Task Checklist

Yes

Create Task Step

Status: 2 record(s) found, 1 page(s). Click [here](#) to count records again..

<input type="checkbox"/>	ID	Step Name	↗	Step Number	↗ ↑
<input type="checkbox"/>	30	Check calendar for open time frame		1	
<input type="checkbox"/>	31	Discuss most urgent training needs with internal support staff		2	

When a task is created from the template, task steps are displayed as a list of items with checkboxes.