

Accessing and Working with Tasks

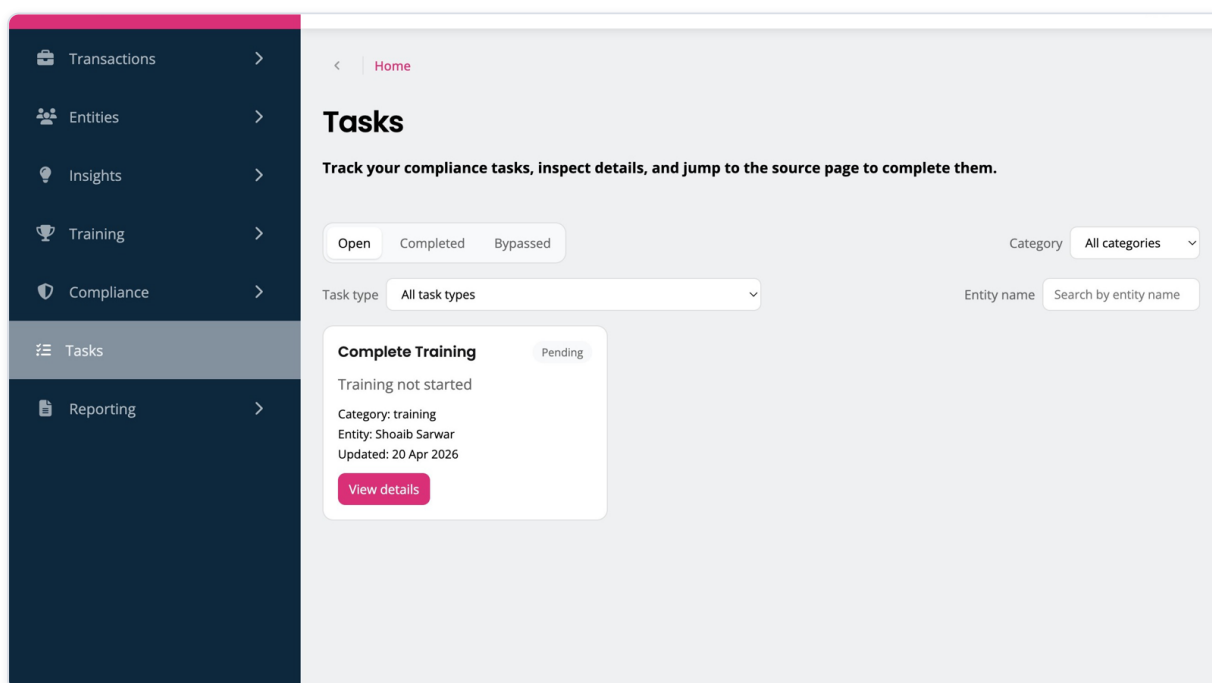
GS-03 · Version 1.1

Tasks are the platform's to-do list for your compliance workflow — anything requiring action lands here, assigned by role. This guide covers navigating the list, completing a task, and finding completed or bypassed items.

OPEN TO START <https://app.easyaml.com/tasks>

Find and action your tasks

- 1 Open the **Tasks** menu on the left. Your list shows all pending items assigned to you — what appears here is specific to your role, reflecting both what's been completed and what still needs attention.



- 2 Click any task entry to expand its full details — a clear picture of what's required before you begin.

The screenshot displays the easyAML user interface. On the left is a dark sidebar with navigation links: Transactions, Entities, Insights, Training, Compliance, Tasks (highlighted), Reporting, Apps, and Account Settings. The main content area is titled 'Tasks' and includes a sub-header 'Track your compliance tasks, inspect details, and jump to the task you want to complete'. Below this are filters for 'Open', 'Completed', and 'Bypassed' tasks, and a 'Task type' dropdown set to 'All task types'. A task card for 'Complete Training' (status: Pending) is shown, with details: 'Training not started', 'Category: training', 'Entity: Shoailb Sarwar', and 'Updated: 20 Apr 2022'. A red box highlights the 'View details' button on this card. To the right, a modal window titled 'Complete Training' provides further details: Status (Pending), Category (Training), and Task details (Training not started, Type: Complete Training, Entity: hvox0lfzb2g3liwwozjyifjp). A 'Go to task page' button is at the bottom of the modal.

easyAML

Transactions >

Entities >

Insights >

Training >

Compliance >

Tasks

Reporting >

Apps >

Account Settings >

< Home

Tasks

Track your compliance tasks, inspect details, and jump to the task you want to complete

Open Completed Bypassed

Task type All task types

Complete Training Pending

Training not started

Category: training

Entity: Shoailb Sarwar

Updated: 20 Apr 2022

View details

Complete Training ×

Status Pending

Category Training

Task details

Training not started

Type Complete Training

Entity hvox0lfzb2g3liwwozjyifjp

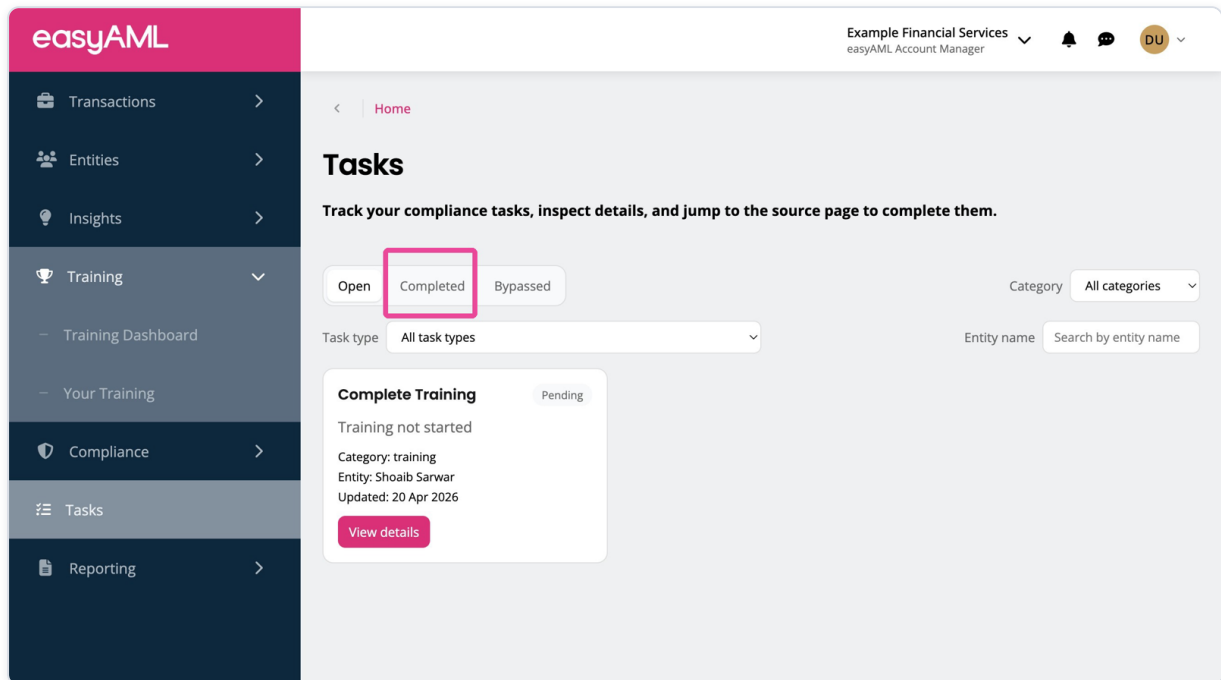
Go to task page

- 3 When ready, click **Go to Task Page**. The task loads with all required fields and actions for completion. (Many tasks — like reviewing a screening match — link straight into the relevant record; the specific guides cover those flows in detail.)

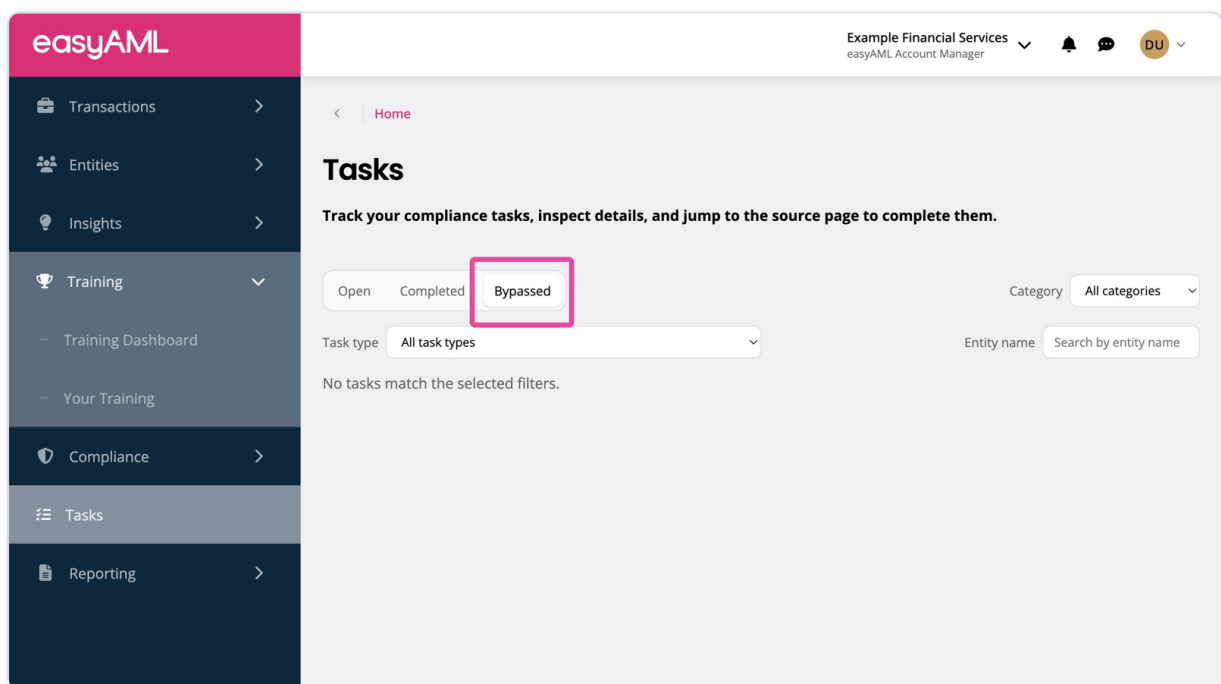
The screenshot displays the easyAML web application interface. On the left is a dark sidebar with navigation links: Transactions, Entities, Insights, Training, Compliance, Tasks (highlighted), and Reporting. The main content area is titled 'Tasks' and includes a subtitle 'Track your compliance tasks, inspect details, and jump to the task page'. Below this are filters for 'Open', 'Completed', and 'Bypassed' tasks, and a 'Task type' dropdown set to 'All task types'. A task card for 'Complete Training' (Status: Pending) is visible, showing 'Training not started', 'Category: training', 'Entity: Shoailb Sarwar', and 'Updated: 20 Apr 2026', with a 'View details' button. On the right, a modal window titled 'Complete Training' provides more details: Status is 'Pending', Category is 'Training', and Task details include 'Training not started', Type 'Complete Training', and Entity 'hvox0lfzb2g3liwwozjyifjp'. A red box highlights the 'Go to task page' button at the bottom of the modal.

Find completed and bypassed tasks

- 1 Use the **status filter** menu to narrow your view — Open, Completed or Bypassed — so you can locate historical records without scrolling through the active list.



- 2 Selecting **Bypassed** shows any tasks skipped or exempted during the workflow — a clear view of items not completed through the standard path.



Task blocked? A parent task can't complete until its subtasks are done — see the companion guide: [Why Is My Task Blocked?](#)

More ways to get help

- **In-platform:** the “Want Help?” button on each page opens the relevant walkthrough.
- **Knowledge Base:** <https://knowledge.easyaml.com/working-with-tasks-in-easyaml>
- **Video walkthrough:**
https://scribehq.com/o/PKpOKi2kThyzGwDRLEXASw/viewer/Accessing_and_completing_tasks_in_easyAML_GZ6hwFWaRZevxdrLLJ03pQ