

Task Restructure - what's changing and why


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What's changing?

We have enhanced the way Tasks behave in Readinow to provide greater flexibility and improved configuration for application and platform developers. These changes streamline task management by allowing tasks related to a resource to be listed on forms and ensuring security access rules, audit rules, and triggers to apply exclusively to specific user-defined task types (e.g., 'User Task') without affecting other system task types.


Summary of the changes:




- **Task Object:** This will now become abstract. Users will not be able to create records directly of the Task object.
- **User Task:** New type of object that users can create records of. All existing Task records will be converted to User Tasks. References to Task, e.g. Create workflow, 'Show records that are only of object Task', will automatically be updated to point to User Task instead.

 **Tasks**

 ACTION 

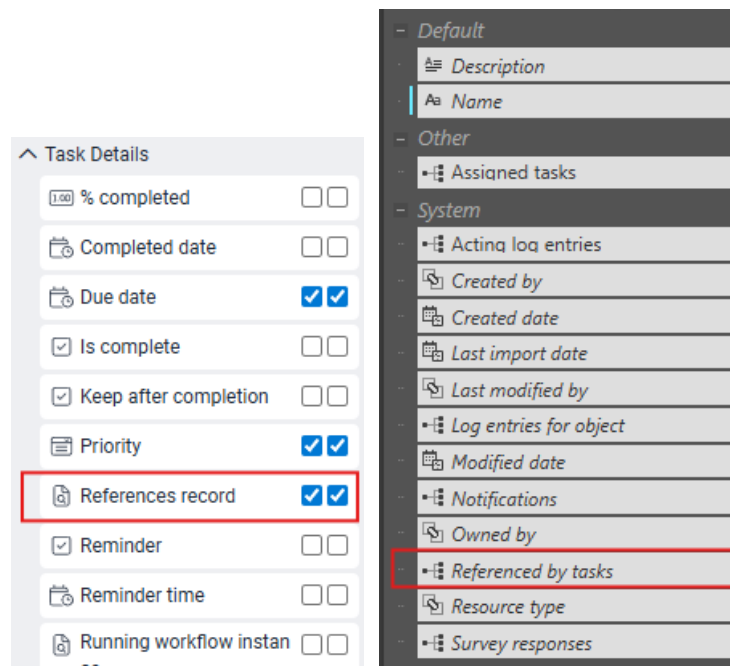
Task	Due date	Priority	Task status	Assigned to	Created date	References record	Resource type
Task name 1	7/10/2025 9:00 AM			Ruby Pabs	7/10/2025 6:25 AM		User Task
for Approve		Normal	Not started	Ruby Pabs	7/9/2025 12:30 PM	Ruby Pabs	Approval Task

 **Objects**

 ACTION  

Name	Description	Inherits	Applications
Appointment	Appointment definition.	Event	ReadNow Core
Approval Items		Owned Items	Shared
Contact	Company contact	Person	Shared
Document	Represents the definition of a document	Editable Resource, Exportable User Data Type, File	ReadNow Core
Email Contact	Email contact.	Editable Resource	ReadNow Core
Employee		Person	Shared
Event	Event definition.	Editable Resource	ReadNow Core
Organisation Assets	Assets which are linked to Organisation levels.	Editable Resource	ReadNow Core Data
Organisation Structure		Editable Resource	ReadNow Core Data
Owned Items		Editable Resource	Shared
Person		Editable Resource, Organisation Assets	ReadNow Core
Phone Contact	Phone contact.	Editable Resource	ReadNow Core
Task	A base task object definition that can be derived from to create specializ...	Editable Resource, Tenant Internal Type	ReadNow Core
User Task	User task.	Task	ReadNow Core
Yaw Test		Editable Resource	ReadNow Console

- **Access rules, audit rules, triggers:** access rules, audit rules, and triggers can now be exclusively setup for User Task and not applied to other types of Tasks.
- **Task-to-Resource relationship:** A new relationship from Task-to-Resource (*Referenced by tasks/References record*). This can be used to list tasks of any Task type (currently Prompt Task and Approval Task) linked to a resource. Or to see the record associated to each task in your Task report in one column.



For more details on the new Task structure and how to configure it, go to <https://readinow.knowledgeowl.com/docs/new-task-structure-overview-and-configuration-guide>

When will it happen?

These changes will be reflected in **Release 2.205** on August 21, 2025.

Why are we making these changes?

These changes are driven by the need to address key challenges in the current task setup:

- **Simplified Task Relationships**
 - With this change, app developers will no longer need to create multiple relationship types for different tasks. A single Task-to-Resource relationship can be used to retrieve and manage any type of task, making integration more efficient and consistent.
 - Previously, it wasn't possible to list Tasks associated to a resource on a form. With this change, app developers can now easily display Tasks (currently Prompt Task and Approval Task) linked to a resource on a form, improving visibility and management.
- **Improved Access Rules Control:** Access rules applied to the base Task were affecting all task types, including child tasks. With the new model, access rules are applied specifically to User Task (formerly the base Task), ensuring that only User Task are affected. This reduces the risk of granting excessive access to other task types.
- **Performance Gains:** Previously, enabling audit rules or triggers for the base Task affected all child tasks, leading to unnecessary performance overhead. With the update, audit rules and triggers applied to User Tasks will only affect those tasks, significantly improving system performance, especially for workflows involving multiple task types.
- **Future Enhancements:** With the task restructure in place, enabling relationships for other task types, such as

User Tasks, Process Step Tasks or User Survey Tasks, will be more straightforward. App developers will no longer need to create separate relationships for each task type. Instead, they can use the existing Task-to-Resource relationship to retrieve and display all task types in a consistent way.

How this affects you?

There will be no noticeable changes to your existing configurations, except that existing "Task" records will now become "User Task" records. All necessary updates to your configurations using the Task object will be automatically applied once the changes are deployed.

Limitation: Importing Resources Exported Before the Change

If a resource was exported before the Task restructure is deployed and then imported after the update, the import will complete successfully - however, Task-related references will not be upgraded when using resource XML imports.

For example, if an app contains a Form with a relationship to Task (BaseUserTask):

- When deployed via the App Library (app XML), the upgrade process will correctly update the reference to User Task.
- When imported via a resource XML, Form → BaseUserTask will still be assigned.

To avoid this issue:

- Import app XML after the restructure is in place, or
- If importing using resource XML, manually review and update any Task-related references to align with the new structure.

Action Required

No manual configuration changes are needed - your existing Tasks and related configurations will be automatically upgraded. However, we recommend reviewing and testing your apps and workflows that use Tasks to ensure everything continues to work as expected after the update.