

Google Sheets Workflow Automation & Task Tracker System

What this tracker does:

- Tracks tasks, owners, priorities, statuses, due dates, and completion dates.
- Highlights overdue and upcoming tasks automatically.
- Summarizes workflow progress on the Dashboard tab.
- Archives completed tasks so the active tracker stays clean.
- Can run scheduled refreshes using Apps Script triggers.

How to use this file:

1. Open the Workflow Automation menu.
2. Click Start / Reset Tracker the first time you use this file.
3. Go to the Task Tracker tab.
4. Add each task as a new row.
5. Choose Priority and Status using the dropdowns.
6. Add a Due Date so overdue/upcoming formatting works.
7. Click Workflow Automation → Update Tracker & Dashboard.
8. Click Workflow Automation → Archive Completed Tasks when completed items should be moved out.

Workflow Automation menu guide:

Start / Reset Tracker

Creates or resets all tracker tabs, formatting, dropdowns, dashboard, and archive.

Update Tracker & Dashboard

Refreshes task IDs, formatting, charts, dashboard metrics, and timestamps.

Archive Completed Tasks

Moves completed tasks from Task Tracker to Archive.

Turn On Daily Refresh

Automatically updates the tracker and dashboard once per day.

Turn Off Daily Refresh

Removes the scheduled daily refresh.

Important notes:

- Do not rename the tabs unless you also update the Apps Script constants.
- Task ID is auto-filled when blank.
- Last Updated is refreshed when the dashboard is rebuilt.
- Completed tasks are archived only when Status = Complete.

Recommended workflow:

Add tasks → Update statuses → Update Tracker & Dashboard → Archive completed tasks