

About tasks

A task is an action associated with zero, one or more elements or element revisions in a project and assigned to one or more users. Tasks enable you to better manage the required actions or the review and approval of elements in your projects.

Depending on your user rights, you can create tasks, assign them to members of your project team, and monitor the status and completion of each task. Depending on their task rights, users assigned to tasks can set status, review, approve, and reject elements and element revisions associated with tasks.

Tasks provide flexibility in how you manage the actions that users perform. You can use tasks in the following ways:

- Create multiple tasks for a single element or element revision and assign each task to a different person
- Associate multiple elements with a single task
- Create an action task and assign to one or multiple users
- Create an unlimited number of tasks within a project
- Associate a task with multiple users or user groups

Types of tasks

Users can be assigned to tasks to review elements or approve elements or to action tasks, depending on their user rights. Users who have the View My Tasks project user right, but not the Approve Tasks project user right, can be assigned to tasks as a reviewer. Users who have the Approve Tasks project user right can be assigned to tasks as an approver. Users who have the Approve Tasks and the Use Matchprint Virtual project user right can be assigned to tasks as a color approver. Users who have the View My Tasks project user right can be assigned to action tasks.

Tasks for element review or approval are used for an informal or formal element review processes. For example, you might assign a task to your company lawyer to approve the legal text in an annual report. You might assign a task to several members of your team when you want their input on elements. You might assign a task to specific people to review the color accuracy of elements.

Note that the concepts of Approval task type, Review task type and Mixed task type no longer exist. You can always assign approvers and reviewers to a task without specifying a task type. The legacy Approval tasks and Review tasks are still available and remained as the Approval tasks and Review tasks.

Action tasks are used to track action items for users without any element review processes.

Tasks and element revisions

When you create a task for an element that has multiple revisions, the task is associated with the latest revision of the element. If you create a task for an element and then a newer revision of the element is uploaded, the task points to the latest revision and the task status is reset.

Tasks and Smart Review

For tasks for element review or approval, you can view, annotate, and set the status in Smart Review. If you are assigned a task as a color approver, you must view and set the status for the task's associated elements in Smart Review.

Task Reference Elements

Sometimes you want to include an element in a task that is used for visual comparison to another element only and does not require approval or review. This element is called a Task Reference Element and is added to the task to help task users with their approval process. This task reference element is available in Smart Review for comparison and cannot be annotated or approved/rejected.

Task Templates

Task templates enable you to configure a task and store its settings for a future reuse. Task templates can be created from the Task Template menu, or from an existing task when you edit it. Task templates are defined and saved at the customer, group or project level, and must be uniquely named. To be able to manage task templates you must have a project role that includes the Admin Tasks user right.