

Creating a task

Create a task for elements in a project and assign the task to users who need to take actions or to review or approve the elements.

Requirements: You must have a project role that includes the Create Tasks user right.

Creating tasks for element review or approval

1. In the **Elements** view, select the elements for which you want to create a task.
2. Without selecting any element, select **Task > Create Task**.
The Create Task dialog box appears.
3. On the **Description** tab:
 - a. Type a name for the task.
 - b. Perform the following actions as needed:

For this option	Do this
Due Date	Select the due date by which users must set the task status.
Description	Type information about the task.
Color Approval	Select this check box if you want to perform Matchprint Virtual color-accurate monitor proofing for the elements, based on the color target that you select in the list. This option is only available when the following conditions are met: • The Matchprint Virtual option is licensed for your system. • One or more color targets are available to you to associate with the task. Note: Color targets are used to render the elements in Smart Review. Your system administrator sets up the color targets. • At least one of the selected elements uses a format that is supported by Matchprint Virtual
Task Options	• Select Require password authentication for approvers to require approval users to enter the system password before setting the task status. • Select Allow 'Approve With Changes' Status to make the Approve With Changes status available when users approve a task (in addition to the default Approved and Rejected statuses). • Select Only allow 'OK' status for reviewers to allow reviewers to set the Review - OK status only. With this option selected, the Review - Not OK status is disabled. • Select Exclude task from automatic reminders to exclude this task from the auto-task reminder mechanism which may be configured for the customer. • In the Owner list, select the owner of the task. This property can be used for efficient task management, such as searching and filtering.

4. On the **Elements** tab, perform the following actions as needed:

For this option	Do this
Elements	View the elements that are assigned to the task.
Reference Elements	If multiple elements are assigned to a task, you can select an element or elements as reference elements: • To demote elements to task reference elements select them and click the down arrow button. • To promote reference elements to elements select them and click the up arrow button.

5. On the **Users** tab, perform the following actions as needed:

For this option	Do this
Filter	(Optional) If a user to be assigned to the task has a User Category assigned, the Filter list appears. Select a User Category from the list to filter the users in the Users area.
Task Checklist	(Optional) If the Task Checklist is added to the customer, available Task Checklists appear in the Task Checklist menu. Select a Task Checklist that you want to apply to the task.
Users	Select the users that you want to assign to the task. Select the approver users, reviewer users, and color approver users separately.
Sequence	(Optional) Add a sequence number for each user to control the task notification order. If the sequence numbers are assigned, the users with the lowest sequence number receive the task notification at first. Other users with higher sequence numbers will not receive the task notification until the users with lower sequence numbers approve the task.
Due Date	(Optional) If you set the Sequence number, you can set a specific due date for the user.

6. On the **User Group** tab, perform the following actions as needed:

For this option	Do this
Filter	(Optional) If a user group to be assigned to the task has a User Category assigned, the Filter list appears. Select a User Category from the list to filter the user groups in the User Groups area.
Task Checklist	(Optional) If the Task Checklist is added to the customer, available Task Checklists appear in the Task Checklist menu. Select a Task Checklist that you want to apply to the task.

User Groups	Select the user groups that you want to assign to the task. Select the approver user groups, reviewer user groups, and color approver user groups separately.
Sequence	(Optional) Add a sequence number for each user group to control the task notification order. If the sequence numbers are assigned, the user groups with the lowest sequence number receive the task notification at first. Other user groups with higher sequence numbers will not receive the task notification until the users with lower sequence numbers approve the task. Note: If you create a task with users with sequence numbers and another user without a sequence number, the user without a sequence number is considered the last user in the sequence. For example, if you add three users with the sequence number 1, 2 and empty, the user without the sequence number is considered third in the sequence order. This user will receive the notification after the user with the sequence number 2 set the task status.
Due Date	(Optional) If you set the Sequence number, you can set a specific due date for the user group.
First vote counts for group	Select this check box if you want the first user in the group who sets the task status to set the status for the whole group. No other members of the group can set or change the task status.
User Group Members	When you assign a task to a user group, all members of the user group are automatically assigned to the task. A list of the users' names with adjacent check box next to each name is created. All the check boxes are automatically selected. To remove a user from the task assignment, clear a user's check box. The membership in the user group is unaffected. If a user is selected two or more times because of membership in one or more user groups, the user is excluded from the user groups and added as a individual user.

7. (Optional) On the **Tasks Reference** tab, add reference elements from other task.
 - a. Select a customer from the **Customer** list, select a project from the **Project** list, and select a task from the **Task** list in order to list task elements in the selected task.
 - b. Select an element from the **Elements** area that you want to add as a reference element. Click **Add** to move it to the **Reference Elements** area.

Note: The **Create** button is activated only when all the necessary attributes of the task are defined. For example, the name of the task and user or user group(s).

8. Click **Create**.

Creating an action task

1. In the **Elements** view, without selecting any element, select **Task > Create Task**.
The Create Action Task dialog box appears.
2. On the **Description** tab:
 - a. Type a name for the task.
 - b. Perform the following actions as needed:

For this option	Do this
Due Date	Select the due date by which users must set the task status.
Description	Type information about the task.
Task Options	In the Owner list, select the owner of the task. This property can be used for efficient task management, such as searching and filtering.

3. On the **Users** tab, select the users that you want to assign to the task. Select the approver users, reviewer users, and color approver users separately.
Note: If a user to be assigned to the task has a User Category assigned, the **Filter** list appears. Select a User Category from the list to filter the users in the **Users** area.
4. On the **Users Group** tab, select the user groups that you want to assign to the task.
If a user group to be assigned to the task has a User Category assigned, the **Filter** list appears. Select a User Category from the list to filter the user groups in the **User Groups** area.
Note: The **Create** button is activated only when all the necessary attributes of the task are defined. For example, the name of the task and user or user group(s).
5. Click **Create**.