

Editing a task template

You can edit all the attributes of a task template, including the name, due date, and description, turn password authentication on or off, and add and remove users and user groups in the task. Editing a task template does not affect any tasks created from the task template.

Requirements: You must have a project role that includes the Task Administrator user right.

Editing a task template

1. In the Task Template view, click a task template, and from the **Task Template** menu, select **Edit Task Template**.
2. Perform the following actions as needed:

For this option	Do this
Name	Type the task name.
Days to Due Date	Select the days to due date by which users must set the task status.
Description	Type information about the task.
Require Password Authentication	Select this check box if you want users to enter the system password before setting the status for the task.
Allow 'Approve With Changes' Status for approver	Select this check box if you want to allow approvers to approve with changes.
Only allow 'OK' status for reviewers	Select this check box if you want to allow reviewers to only use the OK status.
Exclude task from automatic reminders	Select this check box if you want to exclude this task from the auto-task reminder mechanism which may be configured for the customer.
Owner list	Select an owner user for the task. This property can be used for efficient task management, such as searching and filtering.

Users and user groups	Select this check box for each user that you want to add to the task, and clear the check box for each user that you want to remove from the task. This is useful when you want different users to review the elements that are already associated with a task. If you add a user group to the task, you can also select the Group Vote check box if you want the first user in the group that sets the status for the task to set the status for the whole group. (No other members of the group can set or change the task status.) Notes: • You can also modify the Sequence and Due Date on both user and user groups. • If a user group was originally assigned the task, the check boxes for individual users in the group are selected, but the user group is not selected. The group vote is also lost. You can re-add the group to the task and reselect the group vote.
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3. When you complete editing the required attributes of the template, click **Update**.

Editing an action task template

1. In the Task Template view, click a task template, and from the **Task Template** menu, select **Edit Task Template**.
2. Perform the following actions as needed:

For this option	Do this
Name	Type the task name.
Days to Due Date	Select the days to due date by which users must set the task status.
Description	Type information about the task.
Owner list	Select an owner user for the task. This property can be used for efficient task management, such as searching and filtering.
Users and user groups	Select this check box for each user that you want to add to the task, and clear the check box for each user that you want to remove from the task. This is useful when you want different users to review the elements that are already associated with a task. If you add a user group to the task, you can also select the Group Vote check box if you want the first user in the group that sets the status for the task to set the status for the whole group. (No other members of the group can set or change the task status.) Note: If a user group was originally assigned the task, the check boxes for individual users in the group are selected, but the user group is not selected. The group vote is also lost. You can re-add the group to the task and reselect the group vote.

3. When you complete editing the required attributes of the template, click **Update**.