

How to Create a Document - Based Task

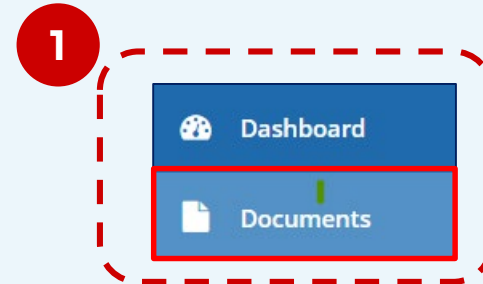
TI version 10.6

APPLICABLE TO:

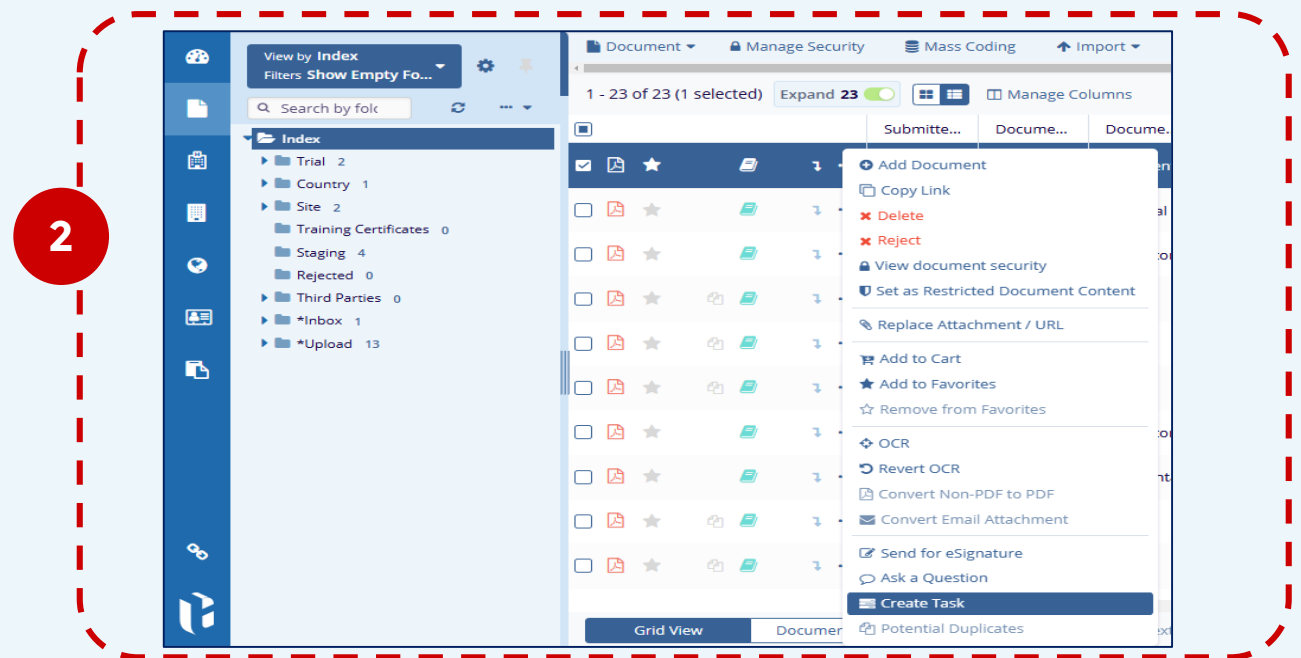
- Admin
 - Manager
 - Editor
 - Reader
- eTMF

Non-Administrator users can create a task this way if the corresponding Assign Task action has been enabled in their user profile.

1 Log into a room and navigate to the **Documents Module**



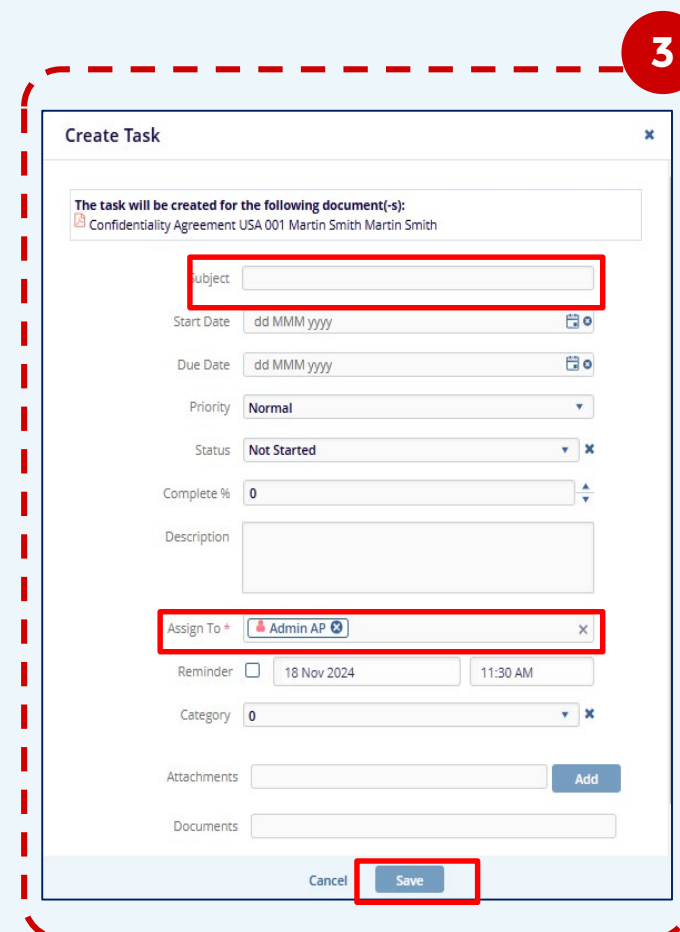
2 Navigate to a document and expand its Document Action Menu. Click on **Create Task**



3 The task creation menu will allow you to set a task by simply entering someone in the *Assign To* box.

A due date, completion status, category, and reminder can be optionally added.

Use **Assign To** to specify users responsible for completing the task - they will also be the recipients of task reminders.



4 Click **Save** to finalize.