

How to Create a Document- Based Task

APPLICABLE TO:

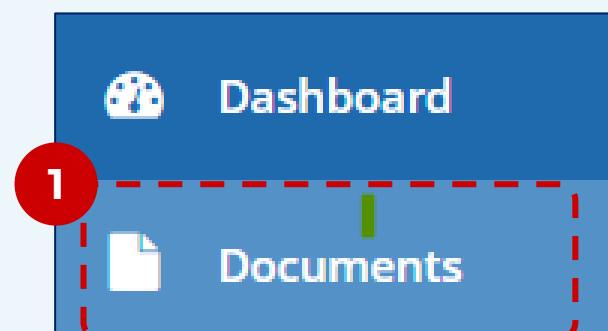
- Admin
- Manager
- Editor
- Reader
- eTMF
- Collaborate
- eISF

Various TI offerings support the creation of Task items, which can be tracked in a dedicated context, to facilitate follow-up on pending jobs or activities within the room.

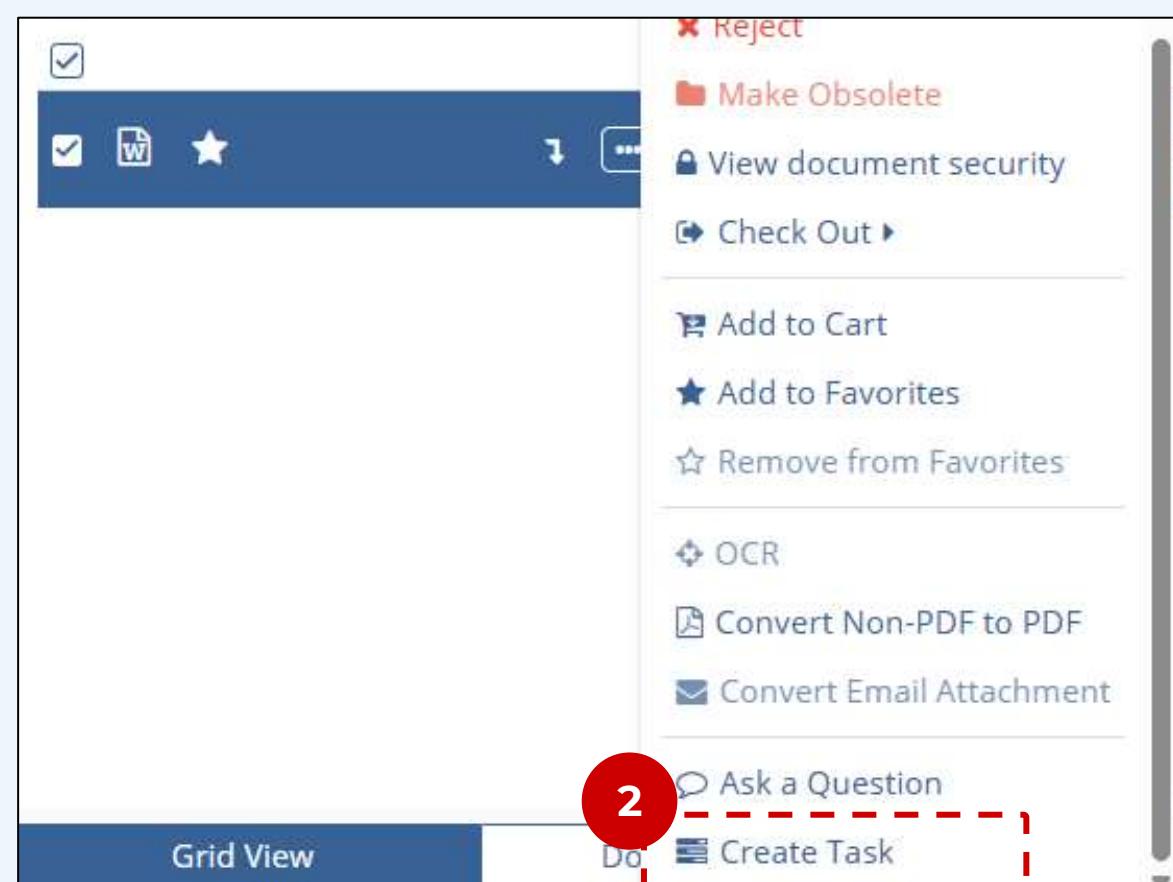
All users can assign a task to themselves. Assigning a task to users other than oneself is restricted to Admins and users with the Assign Task action enabled in their profile.

This Job Aid describes only the creation of a task that is attached to a document, as opposed to a stand-alone task, which may refer to any number of things.

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



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



 The Document Actions menu can be accessed by right-clicking anywhere on a document line, or by clicking on the three-dots icon near the

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3 The task creation menu will allow you to set a task by simply entering someone in the **Assign To** box. Entering a **Subject** to name the task is strongly recommended. A Due Date, Completion status, Category, and Reminder can be optionally added, among other details. User(s) in the **Assign To** field will be deemed responsible for completing the task – they will also be the recipients of the email task reminder if one is set.

3

The task will be created for the following document(s):
SOP Template New

Subject: Demonstration
Start Date: dd MMM yyyy
Due Date: 12 Dec 2025
Priority: Normal
Status: Not Started
Complete %: 0
Description:
Assign To: Manager User
Reminder: 17 Nov 2025, 6:30 AM
Category: 0
Trial Master file:
Attachments:
Documents:
Cancel **Save**

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