

Tasks

Getting Started Guide

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Overview

ImageNow, version 6.6, contains a feature called “tasks.” This guide is designed to provide you with step-by-step instructions on how to define and use tasks in your system. How you use tasks will depend on your role, which ranges from administrative (task template manager) to processing (task assignees). This guide contains the following sections:

- “What are tasks?” introduces tasks and the task specific roles available in your ImageNow 6.6 system.
- “Task reasons and reason lists” explains action and return reasons and reason lists. This section is written for task template managers.
- “Create task templates” explains how to create task templates, which define the behavior of the tasks. This section is written for task template managers.
- “Create tasks” explains how to create tasks based on the available task templates. This section is written for task creators.
- “Process tasks” contains procedural topics including how to complete, sign, and return tasks. This section is written for task assignees.
- “Process Complete Pending Review tasks” explains how to locate and complete tasks that require review. This section is written for task reviewers.
- “Reference” contains information about toolbars and security privileges for task actions.

More specialized topics on working with tasks are available from the Product Help, available in ImageNow and WebNow.

What are tasks?

A task is work on documents and projects that you assign to one or more users. There are three task types: document deficiency, pointer, and signature required. You choose the task that best matches the work that needs to be done. The task types are defined as follows:

- Document deficiency - Create this task type to indicate when a document is missing or incomplete.
- Pointer - Use this task type to draw attention to a specific document or project location for further action.
- Signature required - Assign this task type when a user needs to digitally sign a document. You must have the Document Management Suite license installed on your ImageNow system for this task type to be available.

To create a task, you must first create and configure a task template. As a task template manager, you set the properties, components, actions, assignment, reasons, due date, and security options for the template. Task template security allows you to determine the roles your users have when working with tasks.

Task levels and series hierarchies

When you create a task in ImageNow and WebNow, you can use task levels to assign a series of tasks. Each level in the series represents a single task and is sequential. A task series starts with Level 1 and contains at least two levels. When the task for Level 1 is complete, a new task is created for the task assignee on Level 2. You can assign up to ten task levels, and, in turn, you can assign multiple users or a single group to each level. You can assign the same users or group to multiple levels, however, only the users and groups assigned to the task template are available for assignment.


If you need to accelerate the task completion process, you can set up a task series as a hierarchy. As with task levels, the task series represents a single task that starts with Level 1 and contains at least two levels. However, with the hierarchy, an assignee at a higher level becomes an optional assignee for all prior levels and can complete the task at any time. When an optional task assignee completes a task, that assignee's level in the hierarchy determines whether the next task in the series is created or if the series is complete. When you create a task series hierarchy, you can assign levels to users only and each level must contain unique users.

Task roles

The primary ImageNow task roles are task template manager, task creator, task assignee, and task reviewer. A task template manager configures a task template. A task creator creates and assigns tasks to task assignees. These assignees, in turn, sign, complete, or return tasks. You can assign tasks to multiple users or to a single group. After a task assignee completes a task, a task reviewer may be required to review the task. A review is required when the completion method is set to "Complete pending review" in the task template.

Grant task template manager privileges


To create and manage task templates, you must have the Task Template privilege under Manage on the Global privileges pane. When you have this privilege, you are able to access the Tasks area of the Management Console. You can only modify the task templates you create. To manage another user's task template, you must have the Manage privilege for that template.

1. In the **Management Console**, to grant privileges to a user or group, perform one of the following actions:
 - To grant a privilege to a user:
 1. In the left pane, click **User**.
 2. In the right pane, on the **Security** tab, in the **Select a user** list, select a user and then click **Modify**. If the user you want is not listed, in the **Search for users** box, type all or part of a user name, first or last name and then click **Search**. In the **Select a user** list, select one or more users and then click **Modify**.
Note To sort the **Select a user** list in ascending or descending order, click the **Name**, **Last Name**, or **First Name** column headers.
 - To grant a privilege to a group:
 1. In the left pane, click **Groups**.
 2. In the right pane, on the **Security** tab, in the **Select a group** list, select a group and then click **Modify**. If the group you want is not listed, in the **Search for groups** box, type all or part of a group name and then click **Search**. In the **Select a group** list, select a group and then click **Modify**.
Note To sort the **Select a group** list in ascending or descending order, click the **Name** column header.
2. In the **Security Settings** dialog box, click **Global Privileges**.
3. In the **Privileges** list, under **Manage**, select the **Task Templates** privilege.
4. Click the column to the left of the privilege so that  displays to grant the privilege.
5. Click **OK** until you return to the **Management Console**.

Grant task creator privileges


A task creator uses a task template to create tasks. To create a task, you must be a user with the Create privilege for a task template, a manager, or the owner. A user with this privilege can only modify the tasks they create with this template.

1. In the **Management Console**, in the left pane, click **Tasks**.
2. In the right pane, on the **Templates** tab, perform the following substeps:
 1. In the **Select a task type** list, select a task type.
 2. Under **Templates**, in the **Select a template** list, select a task template and then click **Modify**.
3. In the **Task** dialog box, in the left pane, click **Security**.

4. In the right pane, under **Users and Groups**, click **Add**. In the **Select Users and Groups** dialog box, to add users or groups so they can create tasks with this template, perform one of the following actions:
 - To grant a privilege to a user:
 - On the **Users** tab, in the **Search results** list, select one or more users, click **Add** and then click **OK**.
 - On the **Users** tab, in the **Search for users** box, type all or part of a first name, last name, or user name of the user you want and then click **Search**. In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - To grant a privilege to a group:
 - On the **Groups** tab, in the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
 - On the **Groups** tab, in the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
5. In the **Task** dialog box, under **Users and Groups** in the **Name** list, select the user or group to whom you want to grant the create privilege.
6. Under **Privileges**, in the **Privilege** list, click the column in front of the **Create** privilege so that  displays to grant the privilege.
7. Optional. Verify that the **Automatically grant task creators the Review privileges for the tasks they create** check box is selected. Clear this option if you do not want task creators to review tasks they create.

Verify task assignee view privileges


A task assignee can complete, sign, or return a task to the task creator. To perform one of these actions, a task assignee must be able to access the Tasks pane in ImageNow Viewer. By default, the All Users group has the Access, Access by URL, and Filter privilege for all task views.

1. In the **Management Console**, in the left pane, click **Views**.
2. In the right pane, click the **Task** tab.
3. Under **Select a view**, to verify the privileges for a view, select that view and then click **Modify**.
4. In **ImageNow View Designer**, on the **File** menu, click **Properties**.
5. In the **View Properties** dialog box, on the **Security** tab, under **Users and Groups**, click **All Users**. Under **Privileges**, verify that  appears in front of the Access, Access by URL, and Filter privileges.
6. Click **OK**.

Grant task reviewer privileges

A task reviewer reviews a task after a task assignee completes or signs a task. A task reviewer is required only when the completion method is set to “Complete pending review” in the task template.


1. In the **Management Console**, in the left pane, click **Tasks**.
2. In the right pane, on the **Templates** tab, perform the following substeps:
 1. In the **Select a task type** list, select a task type.
 2. Under **Templates**, in the **Select a template** list, select a task template and then click **Modify**.

3. In the **Task** dialog box, in the left pane, click **Security**.
4. In the right pane, under **Users and Groups**, click **Add**. In the **Select Users and Groups** dialog box, to add users or groups so they can create tasks with this template, perform one of the following actions:
 - To grant a privilege to a user:
 - On the **Users** tab, in the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - On the **Users** tab, in the **Search for users** box, type all or part of a first name, last name, or user name of the user you want and then click **Search**. In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - To grant a privilege to a group:
 - On the **Groups** tab, in the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
 - On the **Groups** tab, in the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
5. In the **Task** dialog box, under **Users and Groups** in the **Name** list, select the user or group to whom you want to grant the review privilege.
6. Under **Privileges**, in the **Privilege** list, click the column in front of the **Review** privilege so that  displays to grant the privilege.
7. Click **OK** until you return to the **Management Console**.

Grant Manage Returned privileges

A user with the Manage Returned privilege can view and modify any returned task created with the task template. Granting this privilege allows a user to manage those tasks originally created using an iScript.

1. In the **Management Console**, in the left pane, click **Tasks**.
2. In the right pane, on the **Templates** tab, perform the following substeps:
 1. In the **Select a task type** list, select a task type.
 2. Under **Templates**, in the **Select a template** list, select a task template and then click **Modify**.
3. In the **Task** dialog box, in the left pane, click **Security**.

4. In the right pane, under **Users and Groups**, click **Add**. In the **Select Users and Groups** dialog box, to add users or groups so they can manage returned tasks for this template, perform one of the following actions:
 - To grant a privilege to a user:
 - On the **Users** tab, in the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - On the **Users** tab, in the **Search for users** box, type all or part of a first name, last name, or user name of the user you want and then click **Search**. In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - To grant a privilege to a group:
 - On the **Groups** tab, in the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
 - On the **Groups** tab, in the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
5. In the **Task** dialog box, under **Users and Groups** in the **Name** list, select the user or group to whom you want to grant the manage returned privilege.
6. Under **Privileges**, in the **Privilege** list, click the column in front of the **Manage Returned** privilege so that  displays to grant the privilege.
7. Click **OK** until you return to the **Management Console**.

Task reasons and reason lists

Reasons provide users with pre-set descriptions that they can select to indicate why they are signing, completing, or returning a task. Task assignees are prompted to select reasons from two drop-down reason lists: action and return. Before you can configure a task template, you must create at least one reason and one reason list.

About reason lists and tasks

A reason list is a set of reasons that you, the administrator, bundle as a list from which the user can select. For example, as administrator, you control the contents of every reason list as well as which reason lists are available for each of the three task template types. You can:

- Create, modify, and delete reasons. Action reasons and reason lists for signature required task templates are managed in the Digital Signatures area of the Management Console. For a user to access Digital Signature reasons and reason lists, he or she must have the Manage Digital Signatures privilege. When you create action reasons and reason lists for document deficiency and pointer task templates, you do so in the Tasks area of the Management Console. Additionally, return reasons for each of the task template types are managed in the Tasks area of the Management Console. A user must have the Manage Task Templates privilege to access Tasks in the Management Console.
- Add reasons or remove reasons from reason lists, as well as arrange the reasons in a preferred selection order. Typically, you place the most frequently cited reason at the top of the list. This allows a task assignee to simply press ENTER to select a reason rather than requiring the assignee to scroll the reason list.
- Create and remove reason lists.
- Assign action reasons to signature required task templates. Action reasons are optional for document deficiency and pointer task templates, but they are mandatory for signature required task templates.
- Assign return reasons to all task types. Return reasons are required for each task template type.

Create reasons for a task template

You create action and return reasons and then group them together in reason lists. Refer to the "Create a reason list for a task template" topic for more information about reason lists. The reasons and reason lists you create in the Tasks area of the Management Console can be assigned as action and return reasons for document deficiency and pointer task templates. Signature required task templates also utilize these same reasons and reason lists as return reasons. However, action reasons and reason lists for signature required task templates are managed in the Digital Signatures area of the Management Console. For more information regarding managing reasons for signature required task templates, refer to the "Create action reasons for a signature required task template" topic.

1. In the **Management Console**, in the left pane, click **Tasks**.
2. In the right pane, click the **Reasons** tab and perform the following substeps to create a reason:
 1. Click **New**.
 2. In the **Reason** text box, type a name.
 3. Repeat the previous two substeps to create additional reasons.
3. Click **Close**.

Create a reason list for a task template

Reason lists are used when you define action and return reasons in document deficiency and pointer task templates. Signature required tasks differ from the other task templates because you define action reasons in the Digital Signatures area of the Management Console. Refer to the "Create action reason lists for a signature required task template" topic for more information.

1. In the **Management Console**, in the left pane, click **Tasks**.
2. In the right pane, click the **Reason Lists** tab and perform the following substeps to create a reason list:
 1. Click **New**.
 2. In the **Reason List** dialog box, on the **General** tab, perform the following substeps:
 1. In the **Name** box, type a name for your reason list.
 2. In the **Description** box, type a reason list description.
 3. Verify that the **Is active** check box is selected to make this list available for assignment.
 3. On the **List Members** tab, in the **Available** list, press CTRL, select one or more reasons, and then click **Add**.
 4. Optional. In the **Selected** list, rearrange the reason order as necessary:
 - To change the position of a reason in the list, select a reason and then click **Move Up** or **Move Down**.
 - To remove a reason from the list, select a reason and then click **Remove**.
 5. Click **OK**.
3. Repeat the previous substeps to create additional reason lists.
4. Click **Close**.

Create action reasons for a signature required task template

To perform this procedure, you must be a user with the Manage Digital Signatures privilege, a manager, or the owner. Even though action reasons are part of a task, you reference the reasons for digital signatures.

1. In the **Management Console**, in the left pane, click **Digital Signatures**.
2. In the right pane, click the **Reasons** tab and then perform the following substeps to create a signature required task template reason:
 1. Click **New**.
 2. In the **Reason** text box, type a name.
 3. Repeat the previous two substeps to create additional reasons.
3. Click **Close**.

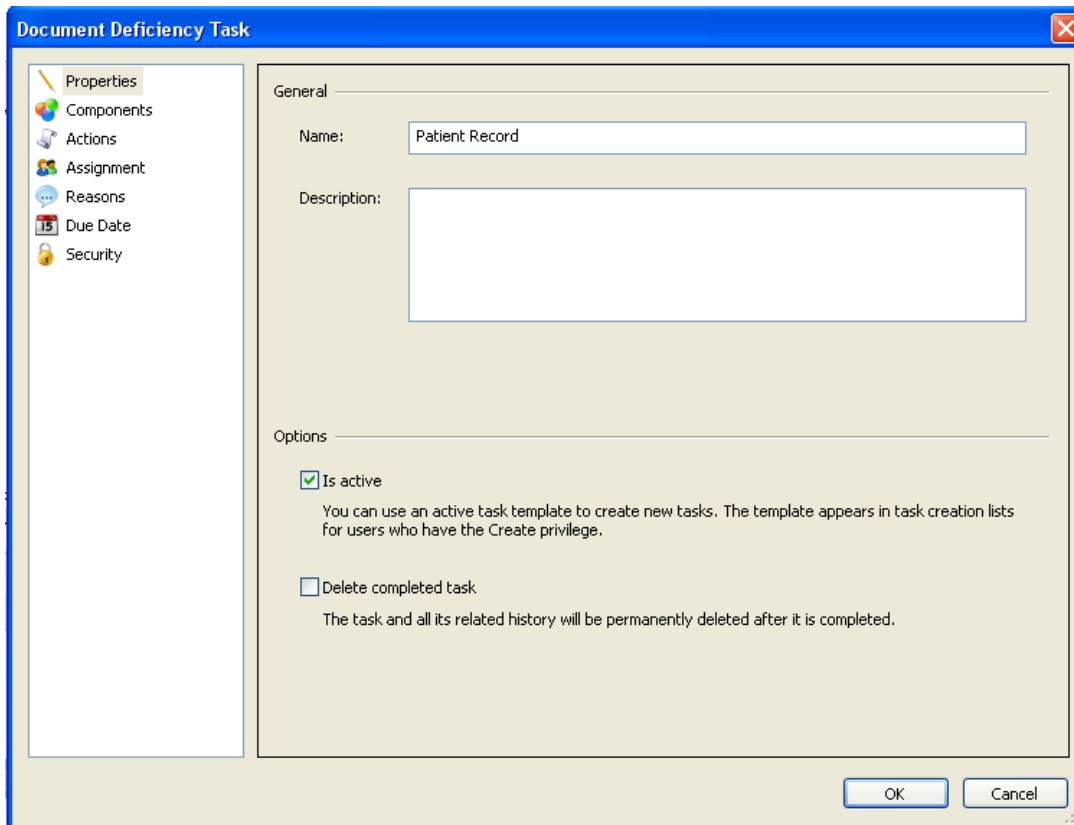
Create action reason lists for signature required task templates

You create action reason lists for signature required task templates in the Reason Lists area of Digital Signatures. The Apply Signature reason list is a system list and is available for all signatures. You can use the system list for signature required tasks or can create a separate list that is specific to tasks. In this procedure, you create a reason list for tasks only.

1. In the **Management Console**, in the left pane, click **Digital Signatures**.
2. In the right pane, click the **Reason Lists** tab and then perform the following substeps to create a signature required task template reason list:
 1. Click **New**.
 2. In the **Reason List** dialog box, on the **General** tab, perform the following substeps:
 1. In the **Name** box, type a name for your reason list.
 2. In the **Description** box, type a reason list description.
 3. Verify that the **Is active** check box is selected to make this list available for assignment.
 3. On the **List Members** tab, in the **Available list**, press CTRL, select the reasons you want, and then click **Add**.
 4. Optional. In the **Selected** list, rearrange the reason order as necessary:
 - To change the position of a reason in the list, select a reason and then click **Move Up** or **Move Down**.
 - To remove a reason from the list, select a reason and then click **Remove**.
 5. Click **OK**.
3. Repeat the previous substeps to create additional reason lists.
4. Click **Close**.

Create task templates

After you configure your action and return reasons and reason lists, you can create a task template. As a task template manager, you specify the task type, a location (project, document, and page), iScripts, an assignment list, a completion method (automatic with valid digital signature, manual and complete pending review), reasons (action and return), a due date method, and security options. Task template security allows you to determine the roles your users have when working with tasks. The following figure shows you the task template dialog box.



Create a signature required task template

Create this task template type to indicate when a document requires a digital signature. You must have the Document Management Suite license installed on your ImageNow system for this task type to be available.

1. In the **Management Console**, in the left pane, click **Tasks**.
2. In the right pane, on the **Templates** tab, in the **Select a task type** box, click **Signature required on document**.
3. Under **Templates**, click **New**.
4. In the **Signature Required on Document Task** dialog box, perform the following substeps:
 1. Define the signature required task template properties.
 1. In the left pane, verify that **Properties** is selected.
 2. In the right pane, under **General**, in the **Name** box, type a name for your task template.
 3. In the **Description** box, type a template description.
 4. Under **Options**, verify that the **Is active** check box is selected. This makes the task template available to task creators who are assigning tasks from the **Tasks** toolbar.
 5. Optional. Select the **Delete completed task** check box to automatically and permanently delete a task and its related history after the task is completed.

Note If a task creator assigns a task series and the Delete completed task check box is selected, ImageNow does not delete the tasks in that series until the series is complete. After a series is complete, that entire series is removed. For more information about task series, refer to the “Task levels and series hierarchies” topic.

2. Define the signature required task template components.
 1. In the left pane, click **Components**.
 2. In the right pane, under **General**, in the **Task instructions** box, type the instructions you want your task assignees to see.
 3. Optional. Select the **Modifiable during task creation** check box to allow a task creator to modify the instructions in the New Task dialog box.
 4. In the **Task location** section, clear or select the **Page with a visual representation** check box. If Page with a visual representation is selected, a visual representation appears on the document.

Note Document is the default location and cannot be modified. Projects cannot be signed, but they can contain signed documents.
 5. In the **Completion method** box, **Automatic with valid digital signature** is selected and cannot be changed.

6. Optional. Under **Workflow Assignment**, select one or both of the following workflow options:
 - **Send to queue** - Select the destination queue option you want. The default option is None, in which case documents or projects are not sent to any queue. If you want to prompt the task creator for a workflow queue, select **Prompt**. All other options are the queues to which the current user has the **Add** privilege.
 - **Send the project to the workflow queue if the task location is a document in a project** – If the task location is a document in a project, select this option to send the project to workflow.

Note To enable the option of sending the project to the workflow queue if the task location is a document in a project option, in the **Send to queue** box, select a queue or **Prompt**.
3. Optional. Define a signature required task template action.
 1. In the left pane, click **Actions**.
 2. In the right pane, under **Scripting**, perform one or more of the following actions to apply an iScript to:
 - Assigned tasks, in the **Assigned** list, select a script.
 - Returned tasks, in the **Returned** list, select a script.
 - Pending review tasks, in the **Pending review** list, select a script.
 - Complete tasks, in the **Complete** list, select a script.
 - Canceled tasks, in the **Canceled** list, select a script.
 - Invalid tasks, in the **Invalid** list, select a script.
 3. To send an e-mail notification to task assignees when a task is created with this template, under **Notifications**, select the **Send e-mail notification when task is created** check box.

Note A task assignee must have an e-mail address configured in his or her user profile in order to receive an e-mail notification. For more information, refer to the “Configure task e-mail notifications” topic.
 4. To include a link in the e-mail notification, perform one or both of the following actions:
 - To include an ImageNow link, select the **Include ImageNow link** check box.
 - To include a WebNow URL link, select the **Include WebNow URL link** check box.
 5. Click **OK**.
4. Define the signature required task template assignment list.
 1. In the left pane, click **Assignment**.
 2. In the right pane, click **Add**.

3. In the **Select Users and Groups** dialog box, to add users or groups so they are available for task assignment, perform one of the following actions:
 - To add users to your assignment list, on the **Users** tab, perform one of the following:
 - In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - In the **Search for users** box, type all or part of a first name, last name, or user name of the user you want and then click **Search**. In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - To add groups to your assignment list, on the **Groups** tab, perform one of the following actions:
 - In the **Search results** list, select one or more groups and then click **Add**.
 - In the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.


Notes

- To sort the Search results list in ascending or descending order, click the **User Name**, **Last Name**, **First Name**, or **Groups** column headings.
 - The assignment list must contain at least one user or group.
4. Optional. Select the **Automatically assign the task to the task creator** check box.
 5. Define the signature required template reasons lists.
 1. In the left pane, click **Reasons**.
 2. Under **Action Reasons**, in the **Action** list, select the action list you want. The assignee must specify the reason why he or she is signing a document. The **Assignee must specify a reason during task completion** check box is unavailable and appears dimmed.
 3. Under **Return Reasons**, in the **Return** list, select a return list.

Note A return list is required.
 6. Define the signature required template due date method.
 1. In the left pane, click **Due Date**.
 2. In the right pane, under **Due Date Calculation**, in the **Method** list, select one of the following methods:
 - **No due date**
 - In the **Method** list, click **No due date**.
 - **Based on assignment date**
 1. In the **Method** list, click **Based on assignment date**.
 2. In the **Days** box, set the number of days you want.
 - **Based on start date**
 1. In the **Method** list, click **Based on start date**.
 2. In the **Days** box, set the number of days you want.
 - **Prompt task creator for date**
 - In the **Method** list, click **Prompt task creator for date**.

7. Define the signature required template security.
 1. In the left pane, click **Security**.
 2. In the right pane, under **Users and Groups**, click **Add**.
 3. In the **Select Users and Groups** dialog box, to add users or groups for privilege assignment, perform one of the following actions:
 - To add users, on the **Users** tab, perform one of the following actions:
 - In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - In the **Search for users** box, type all or part of a first name, last name, or user name of the user you want and then click **Search**. In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - To add groups, on the **Groups** tab, perform one of the following actions:
 - In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
 - In the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.

Note To sort the **Search results** list in ascending or descending order, click the **User Name**, **Last Name**, **First Name**, or **Group Name** column headings.

4. Under **Users and Groups**, select a user or group you want to assign privileges to.
5. To grant the user or group the following privileges, click the column in front of each privilege until  appears. You can grant or deny privileges to create, delete, modify, review, view, and manage returned tasks created with this template. Additionally, grant or deny the Manage privilege for the template itself.
 - **Create** - To allow the user or group to create tasks with this template, grant this privilege.
 - **Delete** - To allow the user or group to delete tasks created with this template, grant this privilege.
 - **Manage** - To allow the user or group to manage this template, grant this privilege.

Note In order for the user or group to access task templates in the Management Console, the user or group must have the Manage Task Templates privilege in the Global Privileges pane.
 - **Modify** - To allow the user or group to modify tasks created with this template, grant this privilege.
 - **Review** - To allow the user or group to review tasks created with this template, grant this privilege. Reviewers look at tasks after they are completed by a task assignee.

- **View** - To allow the user or group to view tasks created with this template, grant this privilege. The user or group with this privilege can view tasks but cannot process or modify them.

Note The View privilege is not required for task assignees. The user or group assigned to a task automatically has the ability to view that task. Additionally, by default, task creators and reviewers are automatically able to view tasks they created or for which they are reviewers. However, because tasks are associated with documents and projects, the user or group must have the necessary document or project privileges.

- **Manage Returned** - To allow the user or group to view and modify returned tasks created with this template, grant this privilege.

Note Alternatively, you can click **Allow All**, **Deny All**, or **Deselect All** to allow, deny, or deselect all privileges for the selected user or group.

6. Verify that the **Automatically grant task creators the Review privilege for the tasks they create** check box is selected. If you don't want task creators to review the tasks they create, clear this option.
5. Click **OK** and then click **Close**.

Create a document deficiency task template

Create this task template type to indicate when a document is missing or is incomplete.

1. In the **Management Console**, in the left pane, click **Tasks**.
2. In the right pane, on the **Templates** tab, in the **Select a task type** box, click **Document deficiency**.
3. Under **Templates**, click **New**.
4. In the **Document Deficiency Task** dialog box, perform the following substeps:
 1. Define the document deficiency task template properties.
 1. In the left pane, verify that **Properties** is selected.
 2. In the right pane, under **General**, in the **Name** box, type a name for your task template.
 3. In the **Description** box, type a template description.
 4. Under **Options**, verify that the **Is active** check box is selected. This makes the task template available to task creators assigning tasks from the **Tasks** toolbar.
 5. Optional. Select the **Delete completed task** check box to automatically and permanently delete a task and its related history after the task is completed.

Note If a task creator assigns a task series and the Delete completed task check box is selected, ImageNow does not delete the tasks in that series until the series is complete. After a series is complete, that entire series is removed. For more information about task series, refer to the "Task levels and series hierarchies" topic.

2. Define the document deficiency task template components.
 1. In the left pane, click **Components**.
 2. In the right pane, under **General**, in the **Task instructions** box, type the instructions you want your task assignees to see.
 3. Optional. Select the **Modifiable during task creation** check box to allow a task creator to modify the instructions in the **New Task** dialog box.

4. In the **Task location** section, select one or more of the following locations to determine where tasks created with this template can be assigned:
 - **Project** – Create a task for a project.
 - **Document** – Create a task for a document.
 - **Page without a visual representation** – Create a task for a page in a document with no visual representation.
 - **Page with a visual representation** – Create a task, along with a visual representation, for a page in a document.

Notes

- You must select at least one task location.
- When multiple location options are selected, the task creator has the ability to select the location option he or she wants.

5. In the **Completion method** box, select one of the following methods:
 - **Manual** – After task assignees complete a task, the task status is Complete.
 - **Complete pending review** – After task assignees complete a task, the task status is Complete Pending Review. Tasks with this status go to a reviewer.
 - Optional. Under **Workflow Assignment**, select one or both of the following workflow options:
 - **Send to queue** - Select the destination queue option you want. The default option is None, in which case documents or projects are not sent to any queue. If you want to prompt the task creator for a workflow queue, select **Prompt**. All other options are the queues to which the current user has the Add privilege.
 - **Send the project to the workflow queue if the task location is a document in a project** – If the task location is a document in a project, select this option to send the project to workflow.

Note To enable the option of sending the project to the workflow queue if the task location is a document in a project option, in the **Send to queue** box, select a queue or **Prompt**.

3. Optional. Define a document deficiency task template action.
 1. In the left pane, click **Actions**.
 2. In the right pane, under **Scripting**, perform one or more of the following actions to apply an iScript to:
 - Assigned tasks, in the **Assigned** list, select a script.
 - Returned tasks, in the **Returned** list, select a script.
 - Pending review tasks, in the **Pending review** list, select a script.
 - Complete tasks, in the **Complete** list, select a script.
 - Canceled tasks, in the **Canceled** list, select a script.
 - Invalid tasks, in the **Invalid** list, select a script.

3. To send an e-mail notification to task assignees when a task is created with this template, under **Notifications**, select the **Send e-mail notification when task is created** check box.

Note A task assignee must have an e-mail address configured in his or her user profile in order to receive an e-mail notification. For more information, refer to the “Configure task e-mail notifications” topic.

4. To include a link in the e-mail notification, perform one or both of the following actions:
 - To include an ImageNow link, select the **Include ImageNow link** check box.
 - To include a WebNow URL link, select the **Include WebNow URL link** check box.
5. Click **OK**.
4. Define the document deficiency task template assignment list.
 1. In the left pane, click **Assignment**.
 2. In the right pane, click **Add**.
 3. In the **Select Users and Groups** dialog box, to add users or groups so they are available for task assignment, select one of the following options:
 - To add users to your assignment list, on the **Users** tab, perform one of the following actions:
 - In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - In the **Search for users** box, type all or part of a first name, last name, or user name of the user you want, and then click **Search**. In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - To add groups to your assignment list, on the **Groups** tab, perform one of the following actions:
 - In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
 - In the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.


Notes

- To sort the **Search results** list in ascending or descending order, click the **User Name**, **Last Name**, **First Name**, or **Group Name** column headings.
 - The **Assignment list** must contain at least one user or group.
4. Optional. Select the **Automatically assign the task to the task creator** check box.
 5. Define the document deficiency template reasons lists.
 1. In the left pane, click **Reasons**.
 2. Optional. Under **Action Reasons**, in the **Action** list, select the action list you want.
 3. Optional. Select the **Assignee must specify a reason during task completion** check box to require task assignee to indicate why he or she is completing a task.
 4. Under **Return Reasons**, in the **Return** list, click a return list.

Note A return list is required.

6. Define the document deficiency template due date method.
 1. In the left pane, click **Due Date**.
 2. In the right pane, under **Due Date Calculation**, in the **Method** list, select one of the following methods:
 - **No due date**
 - In the **Method** list, click **No due date**.
 - **Based on assignment date**
 1. In the **Method** list, click **Based on assignment date**.
 2. In the **Days** box, set the number of days you want.
 - **Based on start date**
 1. In the **Method** list, click **Based on start date**.
 2. In the **Days** box, set the number of days you want.
 - **Prompt task creator for date**
 - In the **Method** list, click **Prompt task creator for date**.
7. Define the document deficiency template security.
 1. In the left pane, click **Security**.
 2. In the right pane, under **Users and Groups**, click **Add**.
 3. In the **Select Users and Groups** dialog box, to add users or groups for privilege assignment, perform one of the following actions:
 - To add users, on the **Users** tab, select one of the following options:
 - In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - In the **Search for users** box, type all or part of a first name, last name, or user name of the user you want and then click **Search**. In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - To add groups, on the **Groups** tab, select one of the following options:
 - In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
 - In the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.

Note To sort the **Search results** list in ascending or descending order, click the **User Name**, **Last Name**, **First Name** or **Group Name** column headings.

 4. Under **Users and Groups**, select a user or group.
 5. To grant the user or group the following privileges, click the column in front of each privilege until  appears. You can grant or deny privileges to create, delete, modify, review, view, and manage returned tasks created with this template. Additionally, grant or deny the manage privilege for the template itself.
 - **Create** - To allow the user or group to create tasks with this template, grant this privilege.
 - **Delete** - To allow the user or group to delete tasks created with this template, grant this privilege.

- **Manage** - To allow the user or group to manage this template, grant this privilege.
Note In order for the user or group to access task templates in the Management Console, the user or group must have the **Manage Task Templates** privilege in the **Global Privileges** pane.
- **Modify** - To allow the user or group to modify tasks created with this template, grant this privilege.
- **Review** - To allow the user or group to review tasks created with this template, grant this privilege. Reviewers look at tasks after they have been completed by a task assignee.
- **View** - To allow the user or group to view tasks created with the template, grant this privilege. The user or group with this privilege can view tasks but cannot process or modify them.
Note The View privilege is not required for task assignees. The user or group assigned to a task automatically has the ability to view that task. Additionally, by default, task creators and reviewers are automatically able to view tasks they created or for which they are reviewers. However, because tasks are associated with documents and projects, the user or group must have the necessary document or project privileges.
- **Manage Returned** - To allow the user or group to view and modify returned tasks created with this template, grant this privilege.

Note Alternatively, you can click **Allow All**, **Deny All**, or **Deselect All** to allow, deny, or deselect all privileges for the selected user or group.

6. Verify that the **Automatically grant task creators the Review privilege for the tasks they create** check box is selected. If you don't want task creators to review the tasks they create, clear this option.
5. Click **OK** and then click **Close**.

Create a pointer task template

Create this task type to draw attention to a specific document or project location for further action.

1. In the **Management Console**, in the left pane, click **Tasks**.
2. In the right pane, on the **Templates** tab, in the **Select a task type** box, click **Pointer**.
3. Under **Templates**, click **New**.
4. In the **Pointer Task** dialog box, perform the following steps:
 1. Define the pointer task template properties.
 1. In the left pane, verify that **Properties** is selected.
 2. In the right pane, under **General**, in the **Name** box, type a name for this task template.
 3. In the **Description** box, type a template description.
 4. Under **Options**, verify that the **Is active** check box is selected. This makes the task template available to task creators assigning tasks from the **Tasks** toolbar.
 5. Optional. Select the **Delete completed task** check box to automatically and permanently delete a task and its related history after the task is completed.

Note If a task creator assigns a task series and the Delete completed task check box is selected, ImageNow does not delete the tasks in that series until the series is complete. After a series is complete, that entire series is removed. For more information about task series, refer to the "Task levels and series hierarchies" topic.

2. Define the pointer task template components.
 1. In the left pane, click **Components**.
 2. In the right pane, under **General**, in the **Task instructions** box, type the instructions you want your task assignees to see.
 3. Optional. Select the **Modifiable during task creation** check box to allow a task creator to modify the instructions on the **Options** tab in the **New Task** dialog box.
 4. In the **Task location** section, select one or more of the following locations to determine where tasks created with this template can be assigned.
 - **Project** – Create a task for a project.
 - **Document** – Create a task for a document.
 - **Page without a visual representation** – Create a task for a page in a document with no visual representation.
 - **Page with a visual representation** – Create a task, along with a visual representation, for a page in a document.

Note You must select at least one task location.
 5. In the **Completion method** box, select one of the following methods:
 - **Manual** – After task assignees complete a task, the task status is Complete.
 - **Complete pending review** – After task assignees complete a task, the task status is Complete Pending Review. Tasks with this status go to a reviewer.
 6. Optional. Under **Workflow Assignment**, select one or both of the following workflow options:
 - **Send to queue** - Select the destination queue option you want. The default option is None, in which case documents or projects are not sent to any queue. If you want to prompt the task creator for a workflow queue, select **Prompt**. All other options are the queues to which the current user has the **Add** privilege.
 - **Send the project to the workflow queue if the task location is a document in a project** – If the task location is a document in a project, select this option to send the project to workflow.

Note To enable the option of sending the project to the workflow queue if the task location is a document in a project option, in the **Send to queue** box, select a queue or **Prompt**.
3. Optional. Define a pointer task template action.
 1. In the left pane, click **Actions**.
 2. In the right pane, under **Scripting**, perform one or more of the following actions to apply an iScript to:
 - Assigned tasks, in the **Assigned** list, select a script.
 - Returned tasks, in the **Returned** list, select a script.
 - Pending review tasks, in the **Pending review** list, select a script.
 - Complete tasks, in the **Complete** list, select a script.

- Canceled tasks, in the **Canceled** list, select a script.
 - Invalid tasks, in the **Invalid** list, select a script.
3. To send an e-mail notification to task assignees when a task is created with this template, under **Notifications**, select the **Send e-mail notification when task is created** check box.

Note A task assignee must have an e-mail address configured in his or her user profile in order to receive an e-mail notification. For more information, refer to the “Configure task e-mail notifications” topic.


4. To include a link in the e-mail notification, perform one or both of the following actions:
 - To include an ImageNow link, select the **Include ImageNow link** check box.
 - To include a WebNow URL link, select the **Include WebNow URL link** check box.
 5. Click **OK**.
4. Define the pointer task template assignment list.
 1. In the left pane, click **Assignment**.
 2. In the right pane, click **Add**.
 3. In the **Select Users and Groups** dialog box, to add users or groups so they are available for task assignment, perform one of the following actions:
 - To add users to your assignment list, on the **Users** tab, perform one of the following actions:
 - In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - In the **Search for users** box, type all or part of a first name, last name, or user name of the user you want and then click **Search**. In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - To add groups to your assignment list, on the **Groups** tab, perform one of the following actions:
 - In the **Search results** list, select one or more groups and then click **Add**.
 - In the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.

Notes

- To sort the **Search results** list in ascending or descending order, click the **User Name**, **Last Name**, **First Name**, or **Groups** column headings.
 - The assignment list must contain at least one user or group.
4. Optional. Select the **Automatically assign the task to the task creator** check box.
5. Define the pointer template reasons lists.
 1. In the left pane, click **Reasons**.
 2. Optional. Under **Action Reasons**, in the **Action** list, select the action list you want.
 3. Optional. Select the **Assignee must specify a reason during task completion** check box to require task assignees to select a reason after completing a task.
 4. Under **Return Reasons**, in the **Return** list, select a return list.

Note A return list is required.

6. Define the pointer template due date method.
 1. In the left pane, click **Due Date**.
 2. In the right pane, under **Due Date Calculation**, in the **Method** list, select one of the following methods:
 - **No due date**
 - In the **Method** list, click **No due date**.
 - **Based on assignment date**
 1. In the **Method** list, click **Based on assignment date**.
 2. In the **Days** box, set the number of days you want.
 - **Based on start date**
 1. In the **Method** list, click **Based on start date**.
 2. In the **Days** box, set the number of days you want.
 - **Prompt task creator for date**
 - In the **Method** list, click **Prompt task creator for date**.
7. Define the pointer template security.
 1. In the left pane, click **Security**.
 2. In the right pane, under **Users and Groups**, click **Add**.
 3. In the **Select Users and Groups** and dialog box, to add users or groups for privilege assignment, perform one of the following actions:
 - To add users, on the **Users** tab, select one of the following options:
 - In the **Search results** list, select one or more users, click **Add**, and then click **OK**.
 - In the **Search for users** box, type all or part of a first name, last name, or user name of the user you want and then click **Search**. In the **Search results** list, select one or more users, click **Add** and then click **OK**.
 - To add groups, on the **Groups** tab, select one of the following options:
 - In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.
 - In the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add**, and then click **OK**.

Note To sort the **Search results** list in ascending or descending order, click the **User Name**, **Last Name**, **First Name**, or **Group Name** column headings.
 4. Under **Users and Groups**, select a user or group you want to assign privileges to.
 5. To grant the user or group the following privileges, click the column in front of each privilege until  appears. You can grant or deny privileges to create, delete, modify, review, view, and manage returned tasks created with this template. Additionally, grant or deny the manage privilege for the template itself.
 - **Create** - To allow the user or group to create tasks with this template, grant this privilege.
 - **Delete** - To allow the user or group to delete tasks created with this template, grant this privilege.

- **Manage** - To allow the user or group to manage this template, grant this privilege.
Note In order for the user or group to access task templates in the Management Console, the user or group must have the **Manage Task Templates** privilege in the **Global Privileges** pane.
- **Modify** - To allow the user or group to modify tasks created with this template, grant this privilege.
- **Review** - To allow the user or group to review tasks created with this template, grant this privilege. Reviewers look at tasks after they have been completed by a task assignee.
- **View** - To allow the user or group to view tasks created with this template, grant this privilege. The user or group with this privilege can view tasks but cannot process or modify them.
Note The View privilege is not required for task assignees. The user or group assigned to a task automatically has the ability to view that task. Additionally, by default, task creators and reviewers are automatically able to view tasks they created or for which they are reviewers for. However, because tasks are associated with documents and projects, the user or group must have the necessary document or project privileges.
- **Manage Returned** - To allow the user or group to view and modify returned tasks created with this template, grant this privilege.

Note Alternatively, you can click **Allow All**, **Deny All**, or **Deselect All** to allow, deny or deselect all privileges for the selected user or group.

6. Verify that the **Automatically grant task creators the Review privilege for the tasks they create** check box is selected. If you don't want task creators to review the tasks they create, clear this option.
5. Click **OK** and then click **Close**.

Configure task e-mail notifications

You can configure a task template so that task assignees receive an e-mail notification when a task is created using that template. All task templates use the same ImageNow and WebNow link settings.

- To configure the options required for task creation e-mail notifications, perform the following steps:
 1. **Enter the user e-mail addresses**
 1. To add e-mail addresses so that users can receive task creation notifications, perform the following substeps:
 1. In **ImageNow Management Console**, in the left pane, select **Users**.
 2. In the right pane, under **Select a user**, select the user for whom you want to add an e-mail address and then click **Modify**.
 3. In the **Modify User Profile** dialog box, perform the following substeps:
 1. In the left pane, select **Contact Information**.
 2. In the right pane, in the **Email** box, type the user's e-mail address.
 3. Click **OK**.
 2. Repeat the previous substeps to add e-mail addresses for additional users.

2. Optional. Configure ImageNow links

- To include ImageNow links in task creation e-mail notifications, perform the following steps:
 1. On the **ImageNow Server**, navigate to the `[drive:]\inserver6\etc` folder.
 2. Open the **inserverNotification.ini** file in a text editor, and in the [**Email**] section, perform the following substeps:
 1. Configure the **smtp.server** setting, as shown:

```
smtp.server=< SMTP server name or IP address>
```
 2. Configure the **smtp.server.port** as shown. By default, the port number is 25.

```
smtp.server.port=<Port number>
```
 3. Configure the **smtp.from** address, as shown:

```
smtp.from=<From address for e-mail notifications>
```
 3. Save and close the **inserverNotification.ini** file.

3. Optional. Configure WebNow links

1. Optional. To include WebNow URL links in task creation e-mail notifications, perform the following substeps. If you have already configured the SMTP server, go to Step 2.
 1. On the **ImageNow Server**, navigate to the `[drive:]\inserver6\etc` folder.
 2. Open the **inserverNotification.ini** file in a text editor, and in the [**Email**] section, perform the following substeps:
 1. Configure the **smtp.server** setting, as shown:

```
smtp.server=< SMTP server name or IP address>
```
 2. Configure the **smtp.server.port** as shown. By default, the port number is 25.

```
smtp.server.port=<Port number>
```
 3. Configure the **smtp.from** address, as shown:

```
smtp.from=<From address for e-mail notifications>
```
 3. Save and close the **inserverNotification.ini** file.
2. On the **ImageNow Server**, navigate to the `[drive:]\inserver6\etc` folder and then perform the following substeps:
 1. Open the **inow.ini** file in a text editor and in the [**WebNow**] section, configure the **webnow.url** setting as shown:

```
webnow.url=http://<host name>/webnow/
```
 2. Save and close the **inow.ini** file.


Create tasks

To create a task, you must first select a task template. After you select the template, you assign the task to users or to a group. Based on the configuration of the task template you select, you can also set the task location as well as the task start and due dates. Additionally, you can type instructions and comments for your task assignees, and you can select the workflow queue where you want to send a document or project after you create and assign a task. You can use task levels to assign a series of tasks, and you can set up a task series as a hierarchy to accelerate the task completion process. To review these features, refer to the “Task levels and series hierarchies” section in the introduction.

Select a signature required task template

In ImageNow and WebNow, when you want users or a group member to digitally sign a document, create and assign a signing task. To perform this procedure, you must be a user with the Create privilege for a task template, a manager, or the owner. For more information regarding the Create privilege, refer to the “Grant task creator privileges” topic.

The New Task dialog box contains two tabs: Assignment and Options. When you create a task, the configuration of the task template determines the options available on these tabs.

1. In the viewer, open a document or project.
2. Verify that the **Tasks** pane is open.
 - **How?**
 - To display the Tasks pane, in **ImageNow Viewer**, on the **View** menu, click **Tasks**.
 - In **ImageNow Project Viewer**, to display the Tasks pane, click the **Tasks** tab.
3. On the **Tasks** toolbar, right-click the **New signing task**  button and then click the signing task template you want.

Note To display the Tasks toolbar, on the **View** menu, point to **Toolbars** and then click **Tasks**.
4. In the **New Task** dialog box, on the **Assignment** tab, assign the task to a user or group, as described in the following procedures.

Assign a signature required task to a user

1. Click **Add Users**.
2. In the **Select Users** dialog box, perform one of the following options:
 - In the **Search results** list, select one or more users and then click **Add**.
 - In the **Search for users** box, type all or part of a user name, first name, or last name, and then click **Search**. In the **Search results** list, select one or more users and then click **Add**.

Note To sort the Search results and Selected users lists in ascending or descending order, click the **User Name**, **Last Name**, or **First Name** column headers.
3. In the **Selected users** list, verify that the users you want to assign the task to appear and then click **OK**.
4. Optional. To assign additional task levels, on the **Assignment** tab, click the **PLUS SIGN (+)** and then repeat the previous steps.

Note To add an additional level, clear the individual task check box if it is selected. When you add an additional level, ImageNow creates a single task for all task assignees on that level.

5. Optional. To create a task that is created and assigned to each user or group member, select the **Create an individual task for each user or group member** check box. When you do not select this option, a single task is created and assigned to all users.

Note When you create a task for the All Users group, this option is ignored and only a single task is created.

6. Optional. To create a task series based on a hierarchy, perform the following substeps:
 1. Select the **Set series as a hierarchy** check box. When you set the task series to a hierarchy, a single task is created for all task assignees on that level.
 2. To assign the first level in the hierarchy, click **Add Users**.
 3. In the **Search results** list, select one or more users and then click **Add**.
 4. In the **Selected users** list, verify that the users you want to assign the task to appear and then click **OK**.
 5. To assign the second level in the hierarchy, click the **PLUS SIGN (+)** and then click **Add Users** to assign users to this level. As you add levels, the tab name displays as Level <x>, where <x> is a placeholder for the level number.

Note A task series hierarchy must contain at least two levels.

6. Repeat the previous substep to create additional levels. You can create a maximum of ten levels.

Notes

- If only a single user is on the task template Assignment List, that user appears on the Level 1 tab by default.
 - When the **Automatically assign the task to the task creator** check box is selected for the task template, the task creator's name displays on the Level 1 tab, along with all additional tabs, by default.
 - In the **Select Users** dialog box, to view the names of users you recently selected, in the **Search for Users** box, type a name. The list of users changes as you type. By default, the **Search for Users** list stores a maximum of 50 users.
 - The Search results list is limited to the users and group members on the Assignment List in a task template.
 - Group members appear in the Search results list on the Users tab to allow you to assign a task to members of a group. To assign a task to the entire group, click **Add Group**.
7. In the **Details** section, under **Location**, select one the following locations:
 - **Document** - Create a task for a document.
 - **Page with a visual representation** - Create a task, along with a visual representation, for a page in a document.

Notes

- When an image is a non-raster image, such as a Word document, then **Document** is the only available **Location** option.
 - The **Project** and **Page without a visual representation** locations are unavailable and appear dimmed when you create a signing task.
8. In the **Start date** box, set the start date for the task.
 9. In the **Due date** box, set the due date.

10. On the **Options** tab, perform the following substeps:
 1. Optional. Under **General**, select the **Expedite this task** check box. This presents the task to the assignee first when starting automatic task processing.
 2. Optional. In the **Instructions** box, type the instructions you want task assignees to see.
 3. Optional. In the **Comments** box, type your comments as they relate to this task. Comments appear in the **History** box of a task and are not modifiable.
 4. Optional. Under **Workflow**, in the **Send to queue** list, click the queue where you want to send documents or projects after tasks are assigned to the associated documents or projects. The queues available in the **Send to queue** list are those queues for which you have the Add privilege.
 5. Optional. Select the **Send project instead of document** check box to send projects to a workflow queue after you assign a task to a document in the associated projects.
11. Click **OK**.
12. Optional. In the confirmation dialog box, click **OK** and then drag the visual representation to the location you want on the document. The dialog box appears when you click **Page with a visual representation** under **Location**.

Assign a signature required task to a group

1. Click **Add Group**.
2. To select a group, perform one of the following actions:
 - In the **Search for group** box, type the name of the group to which you want to assign a task. In the **Search results** list, select the group and then click **OK**.
 - In the **Select Group** dialog box, in the **Search results** list, select the group you want to assign a task to and then click **OK**.
3. Optional. To assign additional task levels, on the **Assignment** tab, click the **Add Level** tab and then repeat the previous steps.
4. Optional. To create a task that is created and assigned to each user or group member, select the **Create an individual task for each user or group member** check box. When you do not select this option, a single task is created and assigned to all users.

Note When you create a task for the All Users group, this option is ignored and only a single task is created.

Notes

- To sort the Search results list in ascending or descending order, click the **Groups** column header.
 - The Search results list is limited to groups on the Assignment List in a task template.
 - You cannot assign multiple groups to a task.
 - To assign a task to members of a group but not to the entire group, click **Add Users**. User names for the members of a group appear in the Search results list on the Users tab.
5. In the **Details** section, under **Location**, select one the following locations:
 - **Document** - Create a task for a document.
 - **Page with a visual representation** - Create a task, along with a visual representation, for a page in a document.


Notes

- When an image is a non-raster image, such as a Word document, then **Document** is the only available **Location** option.
 - The **Project** and **Page without a visual representation** locations are unavailable and appear dimmed when you create a signing task.
6. In the **Start date** box, set the start date for the task.
 7. In the **Due date** box, set the due date.
 8. On the **Options** tab, perform the following substeps:
 1. Optional. Under **General**, select the **Expedite this task** check box. This presents the task to the assignee first when starting automatic task processing.
 2. Optional. In the **Instructions** box, type the instructions you want task assignees to see.
 3. Optional. In the **Comments** box, type your comments as they relate to this task. Comments appear in the **History** box of a task and are not modifiable.
 4. Optional. Under **Workflow**, in the **Send to queue** list, click the queue where you want to send documents or projects after tasks are assigned to the associated documents or projects. The queues available in the **Send to queue** list are those queues for which you have the Add privilege.
 5. Optional. Select the **Send project instead of document** check box to send projects to a workflow queue after you assign a task to a document in the associated projects.
 9. Click **OK**.
 10. Optional. In the confirmation dialog box, click **OK** and then drag the visual representation to the location you want on the document. The dialog box appears when you click **Page with a visual representation** under **Location**.

Create a document deficiency task

In ImageNow and WebNow, when a document is missing or is incomplete, you can assign a document deficiency task. To perform this procedure, you must be a user with the Create privilege for a task template, a manager, or the owner. For more information regarding the Create privilege, refer to the “Grant task creator privileges” topic.

The New Task dialog box contains two tabs: Assignment and Options. When you create a task, the configuration of the task template determines the options available on these tabs.

1. In the viewer, open a document or project.
2. Verify that the **Tasks** pane is open.
 - **How?**
 - To display the Tasks pane, in **ImageNow Viewer**, on the **View** menu, click **Tasks**.
 - In **ImageNow Project Viewer**, to display the Tasks pane, click the **Tasks** tab.
3. On the **Tasks** toolbar, right-click the **New document deficiency task**  button and click the document deficiency task template you want.

Note To display the Tasks toolbar, on the **View** menu, point to **Toolbars** and then click **Tasks**.
4. In the **New Task** dialog box, on the **Assignment** tab, assign the task to a user or group, as described in the following procedures.

Assign a document deficiency task to a user

1. Click **Add Users**.
2. In the **Select Users** dialog box, perform one of the following options:
 - In the **Search results** list, select one or more users and then click **Add**.
 - In the **Search for users** box, type all or part of a user name, first name, or last name, and then click **Search**. In the **Search results** list, select one or more users and then click **Add**.

Note To sort the Search results and Selected users lists in ascending or descending order, click the **User Name**, **Last Name**, or **First Name** column headers.
3. In the **Selected users** list, verify that the users you want to assign the task to appear and then click **OK**.
4. Optional. To assign additional task levels, on the **Assignment** tab, click the **PLUS SIGN (+)** and then repeat the previous substeps.

Note To add an additional level, clear the individual task check box if it is selected. When you add an additional level, ImageNow creates a single task for all task assignees on that level.
5. Optional. To create a task that is created and assigned to each user or group member, select the **Create an individual task for each user or group member** check box. When you do not select this option, a single task is created and assigned to all users.

Note When you create a task for the All Users group, this option is ignored and only a single task is created.
6. Optional. To create a task series based on a hierarchy, perform the following substeps:
 1. Select the **Set series as a hierarchy** check box. When you set the task series to a hierarchy, a single task is created for all task assignees on that level.
 2. To assign the first level in the hierarchy, click **Add Users**.
 3. In the **Search results** list, select one or more users and then click **Add**.
 4. In the **Selected users** list, verify that the users you want to assign the task to appear and then click **OK**.
 5. To assign the second level in the hierarchy, click the **PLUS SIGN (+)** and then click **Add Users** to assign users to this level. As you add levels, the tab name displays as Level <x>, where <x> is a placeholder for the level number.

Note A task series hierarchy must contain at least two levels.
 6. Repeat the previous substep to create additional levels. You can create a maximum of ten levels.

Notes

- If only a single user is on the task template Assignment List, that user appears on the Level 1 tab by default.
- When the **Automatically assign the task to the task creator** check box is selected for the task template, the task creator's name displays on the Level 1 tab, along with all additional tabs, by default.
- In the **Select Users** dialog box, to view the names of users you recently selected, in the **Search for Users** box, type a name. The list of users changes as you type. By default, the **Search for Users** list stores a maximum of 50 users.

- The Search results list is limited to the users and group members on the Assignment List in a task template.
 - Group members appear in the Search results list on the **Users** tab to allow you to assign a task to members of a group. To assign a task to the entire group, click **Add Group**.
7. In the **Details** section, under **Location**, select one the following locations:
 - In the **Details** section, under **Location**, click one of the following locations:
 - **Project** - Create a task for a project.
 - **Document** - Create a task for a document.
 - **Page without a visual representation** - Create a task for a page in a document with no visual representation.
 - **Page with a visual representation** - Create a task, along with a visual representation, for a page in a document.
- Note** The options selected in the task template and your current location determine what location options are available.
8. In the **Start date** box, set the start date for the task.
 9. In the **Due date** box, set the due date.
 10. On the **Options** tab, perform the following substeps:
 1. Optional. Under **General**, select the **Expedite this task** check box to present the task to the assignee first when starting automatic task processing.
 2. Optional. In the **Instructions** box, type the instructions you want task assignees to see.
 3. Optional. In the **Comments** box, type your comments as they relate to this task. Comments appear in the **History** box of a task and are not modifiable.
 4. Optional. Under **Workflow**, in the **Send to queue** box, click the queue where you want to send documents or projects after tasks are assigned to the associated documents or projects.
 5. Optional. Select the **Send project** check box to send projects to a workflow queue after you assign a task to a document in the associated projects.
 11. Click **OK**.
 12. Optional. In the confirmation dialog box, click **OK** and then drag the visual representation to the location you want on the document. The dialog box appears when you click **Page with a visual representation** under **Location**.

Assign a document deficiency task to a group

1. Click **Add Group**.
2. To select a group, perform one of the following actions:
 - In the **Search for group** box, type the name of the group to which you want to assign a task. In the **Search results** list, select the group and then click **OK**.
 - In the **Select Group** dialog box, in the **Search results** list, select the group you want to assign a task to and then click **OK**.
3. Optional. To assign additional task levels, on the **Assignment** tab, click the **Add Level** tab and then repeat the previous steps.

Note To add an additional level, clear the individual task check box if it is selected. When you add an additional level, ImageNow creates a single task for all task assignees on that level.

- Optional. To create a task that is created and assigned to each user or group member, select the **Create an individual task for each user or group member** check box. When you do not select this option, a single task is created and assigned to all users.

Note When you create a task for the All Users group, ImageNow ignores this option and creates only a single task.

Notes


- To sort the Search results list in ascending or descending order, click the **Groups** column header.
 - The Search results list is limited to groups on the Assignment List in a task template.
 - You cannot assign multiple groups to a task.
 - To assign a task to members of a group but not to the entire group, click **Add Users**. User names for the members of a group appear in the Search results list on the Users tab.
- In the **Details** section, under **Location**, select one the following locations:
 - Project** - Create a task for a project.
 - Document** - Create a task for a document.
 - Page without a visual representation** - Create a task for a page in a document with no visual representation.
 - Page with a visual representation** - Create a task, along with a visual representation, for a page in a document.

Note The options selected in the task template and your current location determine what location options are available.
 - In the **Start date** box, set the start date for the task.
 - In the **Due date** box, set the due date.
 - On the **Options** tab, perform the following substeps:
 - Optional. Under **General**, select the **Expedite this task** check box to present the task to the assignee first when starting automatic task processing.
 - Optional. In the **Instructions** box, type the instructions you want task assignees to see.
 - Optional. In the **Comments** box, type your comments as they relate to this task. Comments appear in the **History** box of a task and are not modifiable.
 - Optional. Under **Workflow**, in the **Send to queue** list, click the queue where you want to send documents or projects after tasks are assigned to the associated documents or projects. The queues available in the **Send to queue** list are those queues for which you have the **Add** privilege.
 - Optional. Select the **Send project** check box to send projects to a workflow queue after you assign a task to a document in the associated projects.
 - Click **OK**.
 - Optional. In the confirmation dialog box, click **OK** and then drag the visual representation to the location you want on the document. The dialog box appears when you click **Page with a visual representation** under **Location**.

Create a pointer task

You can create a pointer task when a user or group needs to take further action on a document or project in ImageNow and WebNow. To perform this procedure, you must be a user with the Create privilege for a task template, a manager, or the owner. For more information regarding the Create privilege, refer to the “Grant task creator privileges” topic.

The New Task dialog box contains two tabs: Assignment and Options. When you create a task, the configuration of the task template determines the options available on these tabs.

1. In the viewer, open a document or project.
2. Verify that the **Tasks** pane is open.
 - **How?**
 - To display the Tasks pane, in **ImageNow Viewer**, on the **View** menu, click **Tasks**.
 - In **ImageNow Project Viewer**, to display the Tasks pane, click the **Tasks** tab.
3. On the **Tasks** toolbar, right-click the **New pointer task**  button and then click a pointer task template.

Note To display the Tasks toolbar, on the **View** menu, point to **Toolbars** and then click **Tasks**.
4. In the **New Task** dialog box, on the **Assignment** tab, assign the task to a user or group, as described in the following procedures.

Assign a pointer task to a user

1. Click **Add Users**.
2. In the **Select Users** dialog box, perform one of the following options:
 - In the **Search results** list, select one or more users and then click **Add**.
 - In the **Search for users** box, type all or part of a user name, first name, or last name, and then click **Search**. In the **Search results** list, select one or more users and then click **Add**.

Note To sort the Search results and Selected users lists in ascending or descending order, click the **User Name**, **Last Name**, or **First Name** column headers.
3. In the **Selected users** list, verify that the users you want to assign the task to appear and then click **OK**.
4. Optional. To assign additional task levels, on the **Assignment** tab, click the **PLUS SIGN (+)** and then repeat the previous substeps.

Note To add an additional level, clear the individual task check box if it is selected. When you add an additional level, ImageNow creates a single task for all task assignees on that level.
5. Optional. To create a task that is created and assigned to each user or group member, select the **Create an individual task for each user or group member** check box. When you do not select this option, a single task is created and assigned to all users.

Note When you create a task for the All Users group, ImageNow ignores this option and creates only a single task.

6. Optional. To create a task series based on a hierarchy, perform the following substeps:
 1. Select the **Set series as a hierarchy** check box. When you set the task series to a hierarchy, a single task is created for all task assignees on that level.
 2. To assign the first level in the hierarchy, click **Add Users**.
 3. In the **Search results** list, select one or more users and then click **Add**.
 4. In the **Selected users** list, verify that the users you want to assign the task to appear and then click **OK**.
 5. To assign the second level in the hierarchy, click the **PLUS SIGN (+)** and then click **Add Users** to assign users to this level. As you add levels, the tab name displays as Level <x>, where <x> is a placeholder for the level number.

Note A task series hierarchy must contain at least two levels.

6. Repeat the previous substep to create additional levels. You can create a maximum of ten levels.

Notes

- If only a single user is on the task template Assignment List, that user displays on the Level 1 tab by default.
 - When the Automatically assign the task to the task creator check box is selected for the task template, the task creator's name displays on the Level 1 tab, and all additional tabs, by default.
 - In the **Select Users** dialog box, to view the names of users you recently selected, in the **Search for Users** box, type a name. The list of users filters as you type. By default, the Search for Users list stores a maximum of 50 users.
 - The Search results list is limited to the users and group members on the Assignment List in a task template.
 - Group members appear in the Search results list on the Users tab to allow you to assign a task to members of a group. To assign a task to the entire group, click **Add Group**.
7. In the **Details** section, under **Location**, select one the following locations:
 - **Project** - Create a task for a project.
 - **Document** - Create a task for a document.
 - **Page without a visual representation** - Create a task for a page in a document with no visual representation.
 - **Page with a visual representation** - Create a task, along with a visual representation, for a page in a document.

Note The options selected in the task template and your current location determine what location options are available.

8. In the **Start date** box, set the start date for the task.
9. In the **Due date** box, set the due date.
10. On the **Options** tab, perform the following substeps:
 1. Optional. Under **General**, select the **Expedite this task** check box to present the task to the assignee first when starting automatic task processing.
 2. Optional. In the **Instructions** box, type the instructions you want task assignees to see.
 3. Optional. In the **Comments** box, type your comments as they relate to this task. Comments appear in the **History** box of a task and are not modifiable.

4. Optional. Under **Workflow**, in the **Send to queue** box, click the queue where you want to send documents or projects after tasks are assigned to the associated documents or projects.
 5. Optional. Select the **Send project** check box to send projects to a workflow queue after you assign a task to a document in the associated projects.
11. Click **OK**.
 12. In the confirmation dialog box, click **OK** and then drag the visual representation to the location you want on the document. The dialog box appears when you click **Page with a visual representation** under **Location**.

Assign a signing task to a group

1. Click **Add Group**.
 2. To select a group, perform one of the following actions:
 - In the **Search for group** box, type the name of the group to which you want to assign a task. In the **Search results** list, select the group and then click **OK**.
 - In the **Select Group** dialog box, in the **Search results** list, select the group you want to assign a task to and then click **OK**.
 3. Optional. To assign additional task levels, on the **Assignment** tab, click the **Add Level** tab and then repeat the previous substeps.
- Note** To add an additional level, clear the individual task check box if it is selected. When you add an additional level, ImageNow creates a single task for all task assignees on that level.
4. Optional. To create a task that is created and assigned to each user or group member, select the **Create an individual task for each user or group member** check box. When you do not select this option, a single task is created and assigned to all users.

Note When you create a task for the All Users group, this option is ignored and only a single task is created.

Notes

- To sort the Search results list in ascending or descending order, click the **Groups** column header.
 - The Search results list is limited to groups on the Assignment List in a task template.
 - You cannot assign multiple groups to a task.
 - To assign a task to members of a group and not the entire group, click **Add Users**. User names for the members of a group appear in the Search results list on the Users tab.
5. In the **Details** section, under **Location**, click one of the following locations:
 - **Project** - Create a task for a project.
 - **Document** - Create a task for a document.
 - **Page without a visual representation** - Create a task for a page in a document with no visual representation.
 - **Page with a visual representation** - Create a task, along with a visual representation, for a page in a document.
- Note** The options selected in the task template and your current location determine what location options are available.
6. In the **Start date** box, set the start date for the task.
 7. In the **Due date** box, set the due date.

8. On the **Options** tab, perform the following substeps:
 1. Optional. Under **General**, select the **Expedite this task** check box to present the task to the assignee first when starting automatic task processing.
 2. Optional. In the **Instructions** box, type the instructions you want task assignees to see.
 3. Optional. In the **Comments** box, type your comments as they relate to this task. Comments appear in the **History** box of a task and are not modifiable.
 4. Optional. Under **Workflow**, in the **Send to queue** box, click the queue where you want to send documents or projects after tasks are assigned to the associated documents or projects.
 5. Optional. Select the **Send project** check box to send projects to a workflow queue after you assign a task to a document in the associated projects.
9. Click **OK**.
10. In the confirmation dialog box, click **OK** and then drag the visual representation to the location you want on the document. The dialog box appears when you click **Page with a visual representation** under **Location**.

Process tasks

After you create tasks, assignees can select the My Assigned view to access their assigned tasks. In this view, a task assignee can open and then digitally sign a document or complete a document deficiency or pointer task. In addition to completing or signing tasks, task assignees can also skip or return them.

My Assigned view task options

When you work with tasks in the My Assigned view, you set the startup and processing options. The startup action options determine what task opens when you select the My Assigned view from the Tasks button on the ImageNow toolbar.

1. On the **ImageNow** toolbar, click the **Settings** menu and then click **Options**.
2. In the **ImageNow Options** dialog box, in the left pane, click **Tasks**.
3. In the right pane, under **Task Startup**, in the **Start action** list, select one of the following options to specify which tasks appear when you launch the **My Assigned** view:
 - To display a list of all tasks that have been assigned to you, select **Show list**.
 - To open a task that is next due, select **Get next task due**.
 - To open a selected type of task that is next due, select **Get next task due of selected type** and then in the **Task type** list, select a task type.
 - To open the oldest task, select **Get oldest task**.
 - To open a selected type of task that is the oldest task, select **Get oldest task of selected type** and then, in the **Task type** list, select a task type you want.
4. To set the next action processing options in the **My Assigned** view, under **Task Processing**, perform one or more of the following actions:
 - Select the **Automatically launch next task upon task completion** check box to automatically open a task or clear the check box to turn off the automatic launch. When you select this option, in the **Next** action list, select one of the following options:
 - To open a task that is next due, select **Get next task due**.
 - To open a selected type of task that is next due, select **Get next task due of selected type** and then, in the **Task type** list, select a task type.
 - If you set the **Start action** box to **Show list**, to open a task from the top of the task list, select **Get next task from top of task list**.
 - If you set the **Start action** box to **Show list**, to open the next task in the task list, select **Get next task in task list**.
 - To open the oldest task, select **Get oldest task**.
 - To open a selected type of task that is the oldest, select **Get oldest task of selected type** and then, in the **Task type** list, select a task type.
 - Select the **Process all the tasks for the current project or document** check box if you want to process all the tasks associated with a project or document before moving on to the next document or project where a task is assigned. Clear the check box to move to the next task in the task list without first completing all the tasks associated with the current project or document.
 - To revisit tasks you skip after all other tasks are complete, under **Skipped Tasks**, select the **Revisit skipped tasks after all other tasks have been completed** check box.
5. Click **OK**.

Open a task

Select the My Assigned view in ImageNow and WebNow to access the tasks that have been assigned to you. To access this view, you must be a user with the Access privilege. For more information, refer to the “Verify task assignee view privileges” topic.

1. On the **ImageNow** toolbar, click the **Tasks** down arrow and then click **My Assigned**. This view automatically returns a list of tasks that have been assigned to you.
2. In **ImageNow Explorer**, double-click a task to open it.

Sign a task

To digitally sign documents in ImageNow and WebNow, you must be a user with the Documents Sign and the Document Management Use Library Services privileges. For more information, refer to the “Task privilege definitions” table in the reference topic of this document.

1. In the viewer, in the **Tasks** pane, in the **Reason** list, select a signing reason to indicate why you are signing a document.
2. In the **Tasks** pane, click **Sign**.
3. If you have a Digital ID, go to step 4. Otherwise perform the following substeps:
 1. In the **Digital Signature Authentication** dialog box, under **Digital Signature Password**, perform the following steps:
 1. In the **Password** box, type a Digital ID password.
 2. In the **Confirm password** box, retype the password.
 3. Optional. In the **Password hint** box, type a hint to help you remember your Digital ID password.
 2. Optional. Under **Name Confirmation**, perform the following substeps:
 1. Optional. In the **Prefix** box, type or select a prefix for your Digital ID.
 2. In the **First name** box, type your first name.
 3. In the **Last name** box, type your last name.
 4. Optional. In the **Suffix** box, type or select a suffix for your Digital ID.
 3. Click **OK**.
4. In the **Digital Signature Authentication** dialog box, in the **Password** box, type your password and then click **OK**.

Note Depending on the option selected in the **Prompt user to enter signing password** box in the Digital Signatures area of Management Console, you either enter your password for each document you sign, or enter your password based on the frequency determined by the administrator.

Complete a task

Whether you are working in ImageNow and WebNow, you can complete the document deficiency and pointer tasks that have been assigned to you.

1. In the viewer, in the **Tasks** pane, in the **Reason** list, select an action reason.

Note In the Reason list, **None** appears if an action reason is marked as not required in the task template.

2. In the **Tasks** pane, click **Complete**.

Note A Complete button is available for pointer and document deficiency tasks. A Sign button is available for signature required tasks.

Return a task

When you work with tasks in ImageNow and WebNow, you can return a task to the task creator. Before you can return a task, you must select a return reason.

1. In the viewer, in the **Tasks** pane, click **Return** to return the task to the task creator.
2. In the **Return Task** dialog box, perform the following substeps:

1. In the **Reason** list, select the reason you are returning the task.

Note A return reason is required for all task types.

2. Optional. In the **Comments** box, type any comments you want the task creator to see.
3. Click **OK**.

Skip a task

As you process tasks in ImageNow and WebNow, you can skip tasks so that you can work them at a later time.

- In the viewer, in the **Tasks** pane, to process a task at a later time, click **Skip**. The options you have set for task processing determine what tasks if, any, appear automatically. For more information, refer to the “My Assigned view task options” topic.

Process Complete Pending Review tasks

After a task assignee completes a task, a task reviewer may be required to review the task. A review is required when the completion method is set to "Complete pending review" in the task template. You assign users or groups the Review privilege in the Security area of the task template. For more information, refer to the "Grant task reviewer privileges" topic.

View and process complete pending review tasks

In ImageNow and WebNow, you can access the To Review view to get to the tasks you need to review.

1. On the **ImageNow** toolbar, click the **Tasks** down arrow and then click **To Review**. The view automatically returns a list of tasks that require your review.
2. In **ImageNow Explorer**, double-click a task to open it.
3. In the **Tasks** pane, click **Complete**. The task status changes from **Complete Pending Review** to **Complete**.

Reference

Task toolbars

Task toolbar



Tool	Name	Description
	New Signing Task	Create a new signing task.
	New Pointer Task	Create a new pointer task.
	New Document Deficiency Task	Create a new document deficiency task.

Task pane toolbar



Tool	Name	Description
	Open	Display the selected task.
	Modify	Display the Modify Task dialog box, in which you can change the selected task.
	Reassign	Assign the selected task to a different user or group.
	Properties	Display the Task Properties dialog box for the selected task.
	Delete	Delete the selected task.
	Refresh	Refresh the task grid in the Tasks pane view.

Task privileges definitions

The following table lists all of the task privileges by type: View Access privileges, Manage privileges, and Task privileges. The table also lists the privilege definition, dependency information, and the privilege location.

Task Privileges			
Type	Definition	Dependency	Location
View Access			
Tasks	The Tasks button is available on a user's ImageNow toolbar and in ImageNow Explorer. In the Tasks node, the user has the following task-enabled views: All Tasks, My Assigned, To Review, Returned to Me, Complete Pending Review, Returned by Me, Complete, Canceled, and Invalid. A user with this privilege is able to access the Tasks pane in the viewers.	This privilege has no dependencies.	To edit this privilege, open Management Console, in the left pane, click Views, and then click the Task tab. After you select the task view you want to edit, click Modify. This privilege is located on the Security tab, in the View Properties dialog box.
Manage Privileges			
Task Templates	The user can rename, copy, modify, or delete the task templates where he or she is the task template creator. The user has the ability to create new task templates in Management Console. To manage another user's template, refer to the Manage privilege in this table.	This privilege has no dependencies.	This privilege is located on the Users or Groups pane, on the Security tab, in the Security Settings dialog box, in the Global Privileges pane.
Task Views	The user can access the Task tab in the Views area, in Management Console. To manage a view, the user must have the Manage privilege for that view.	This privilege has no dependencies.	This privilege is located on the Users or Groups pane, on the Security tab, in the Security Settings dialog box, in the Global Privileges pane.

Type	Definition	Dependency	Location
Digital Signatures	The user has access to the Digital Signatures area of Management Console and has the ability to manage Action reasons and reason lists. You must assign Action reasons for Signature required task templates. It is important to note that a user with this privilege can set Digital ID Expiration, Signing Password, and Digital Signature Report options for your ImageNow system.	This privilege has no dependencies.	This privilege is located on the Users or Groups pane, on the Security tab, in the Security Settings dialog box, in the Global Privileges pane.
Manage	Grant this privilege to a user to allow him or her to manage this task template. The user can rename, copy, modify or delete this task template.	You must grant the user the Task Templates privilege.	This privilege is located in the Security area of a task template.

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