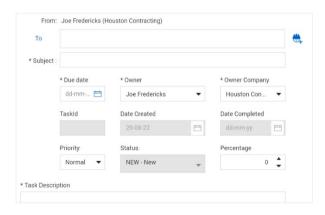## ACCESSING TASKS

1. Click [Document / Dashboard ▾] ▶ **Tasks.**

CREATING TASKS

1. Click [New ▾] [Document / Task / Inbox ▾] ▶ **Task**

2. At the New Task screen, enter the required details.

From:	Joe Fredericks (Houston Contracting)	
To		
* Subject :		

* Due date	* Owner	* Owner Company
dd-mm-...	Joe Fredericks ▾	Houston Con... ▾

TaskId	Date Created	Date Completed
	29-08-22	dd-mm-yy

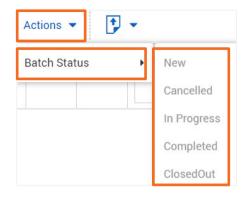| Priority:	Status:	Percentage
Normal ▾	NEW - New ▾	0

* Task Description

3. Go to the **Items** tab.

4. Select the module you want to link items to ▶ then click ⊕ icon.

5. Set the required search criteria and click **Search**.

6. Select the relevant items and click ➡ to add.

7. Click **Save** to complete linking the items.

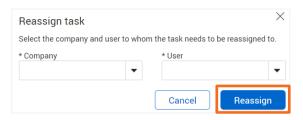8. An email notification will be sent to the user(s) allocated the task and will also appear in their Tasks Inbox.

UPDATE TASK STATUS IN BULK

1. Select the Tasks ▶ click **Actions** ▶ select **Batch Status**.

2. Choose the relevant option.

Actions ▾	📤 ▾

Batch Status ▶

New

Cancelled

In Progress

Completed

ClosedOut

RE-ASSIGN A TASK

1. From within the Task details window, click [Reassign]

2. Choose the Company and User to reassign the task to and click **Reassign**.

Reassign task ✕

Select the company and user to whom the task needs to be reassigned to.

* Company	* User
▾	▾

[Cancel] [Reassign]

3. A task notifications will be sent to both the person the task has been reassigned to and the Task Owner.

CLOSE OUT A TASK

1. Tasks for which all recipients have changed the action status to completed can either be Closed out by the Owner or if not completed as required, reopened by changing the status to an open status in which case the To recipients will be notified.

2. The closeout button is only accessible when the task status is set to completed.

CHANGE THE TASK OWNER

1. A Task Owner can change the ownership to another user in their company. Primary/Additional/Company Administrators can change the ownership of Tasks belonging to their company.

NEED SOME MORE HELP?

📖 Learn more in our Knowledge Library
learn.ineight.com

🖱 Take a course at InEight U
university.ineight.com