Create Workflow Task Definition

To create a new workflow task definition, click on the Actions menu icon on the [Workflow Definitions List Page] and select "Create Workflow Task Definition". Or to edit an existing workflow task definition, click on the Actions menu icon for a Workflow Task Definition that is in *Draft* status and select "Edit Metadata." If the workflow task definition is *Effective*, return it to Draft status by first selecting "Revise" from the Actions menu.

Steps for Creating a New Workflow Task Definition

1. Enter a **Name** for your workflow task definition.
2. (Optional): Add a description for your workflow task definition. The description will be displayed to users responsible for assigning this task during workflow initiation.
3. Choose a process type by selecting the drop-down arrow next to the **Process Type** field. The two options for this field are "Review" and "Approval".
4. If you chose "Approval" in the previous step, specify an approval type by selecting the drop-down arrow next to the **Approval Type** field. If the approval type is "eSignature", the user who completes the task will be required to enter their eTMF login credentials as their electronic signature (equivalent of a handwritten signature), and the signature will be viewable on a signature page/certificate. If the approval type is "eApproval," an electronic signature will not be required upon approval. If the approval type is "N/A – QC Review", the task will be the first stage review task in a combined review/approval workflow. The task will be

assigned to the TMF QC Role group, allowing any member of that group to acquire.

5. Click in the **Meanings** field and choose one or more meanings for the task from the drop-down list. To see more options, scroll down in the list. Multiple meanings can be added. A task may need multiple meanings if it can be assigned to multiple groups of users. Available meanings are maintained in the Meanings dictionary. To remove a selected meaning, click the X next to it.
6. Enter a minimum and maximum number of recipients. The default minimum is one recipient and the default maximum is 10 recipients. Note that these fields are available only if the task is not a QC Review task.
7. Click in the Performer Group IDs field and select one or more user groups containing the users who can be assigned to this task. To see more options, scroll down in the list. To remove a selected Performer Group ID, click the X next to that Performer Group ID. If no groups are selected, the task can be assigned to any user. If the task is being configured as a QC Review task, this field is automatically populated with the TMF QC Role and is disabled.
8. Click **Create** (if you are adding a new workflow task definition) or **Save** (if you are editing an existing definition).