

**A user has called in sick and I need to know what current tasks they have which might be urgent or require completion. How can I find this information?**

From the Admin Menu, select **Reports → Tasks: User Reports**. In the Tasks by User window, select the user from the drop-down menu. Any Tasks that are Overdue, Due in the next 7 days, or Scheduled will be listed. You can then click on the Print icon or Export to Excel.

**How do I create a Task Set?**

From the Admin Menu, select **Configuration → Configure Task Sets**. In the Task Sets window, select “**Add Task Set**” and add the Name of the set. Add the various required tasks by clicking on the green + sign. Multiple tasks can be added to the Task Set – ensure that you give each separate task a name, Due Date, and assigned ACL user(s).

**One of our staff is leaving and we need to re-assign all their tasks to other ACL users. Is there an easy way to do this?**

Yes. From the Admin Menu, select **Tools → Reassign Tasks**. In the Reassign Tasks window, complete the required criteria for removing the old ACL user to the new user.

**Is there a report I can create that will show a list of all tasks for every user?**

Yes. From the Admin Menu, select **Reports → Tasks: User Reports**. You can select a **Start Date**, specific **Users**, and categorization (**Group by**) for the report. The report can then be printed or exported to Excel.

**I'd like to change the number of days to show for upcoming Tasks from 7 days to 9. How can I change this?**

From the Admin menu, select **Settings → System Settings**. Scroll down to the section **Task Manager** and locate the option **Number of days to show upcoming tasks for**. Highlight the option and then edit the number which is displayed toward the bottom of the window. Click **Save**.

**Is there a way to change the time of day that we receive our Outlook reminders?**

Yes. The time for Outlook reminders can be configured in the Admin Menu by selecting **System Settings** and then scrolling down to the section **Task Manager**. Locate and highlight the option **Default time for Outlook Reminders** and then edit the time and save the changes. The Task Reminders Report will be received in Outlook via email.

**The lawyers would like to be automatically assigned to any new tasks that are created by other users. Is this possible?**

Yes. In the Admin Menu select **System Settings** and scroll down to the section **Task Manager**. Locate and highlight the option **Automatically assign the Primary Lawyer of a file to new tasks**. Once the option is highlighted, select **Yes** from the options at the bottom of the window. Click **Save**.

**Can Tasks be locked down so that they can't be edited?**

Currently, there is a setting which, when activated, will lock-down **ALL** tasks from being edited – such tasks will be editable only by the user who creates them, or by the ACL Administrator. From the **Admin menu**, select **Settings** → **System Settings**. Scroll down to the section **Task Manager** and locate the option **Enable Task Security**. Highlight the option and then select **Yes** from the options at the bottom of the window. Click **Save**.

