

### How do I create a task?

Select the file for which the Task is being created (highlight the file in the Files list, or have the file open for editing). From the Task Manager pane on the right, click on the plus sign towards the top of the window  – this will open the “Add Task” window where required task details can be completed.

### I want to remove myself from a Task and assign it to other ACL users. Is this possible?

Yes. When inside the “**Add Task**” or “**Edit Task**” window, locate the section “**Assigned to**”. Click on the link “**Assign to**” to open the list of available ACL users. Your name will appear on the right side under “**Selected Users**” – select your name and then select “**Remove**”. Other ACL users can be assigned to the task by selecting their names from the list on the left side and clicking “**Add**”. Continue to select the required users (multiple users can be assigned) and then click **OK** to save.

### How do I mark a task as being completed?

Locate the Task in the Task Manager pane on the right. Right-click on the Task and select “**Mark as Complete**”. Select the date that the Task was completed then click **OK** to save.

### Is there a way to attach a document to a task?

Yes. In the “**Add Task**” or “**Edit Task**” window, locate the paper clip on the right side of the Notes section – this is the “**Add attachment**” link. Click the link to open the File Explorer window, search for the location of the document, select it and then click “**Open**”.

**NOTE:** Documents stored in a document management system cannot be attached to a task. The document must exist on the local machine, such as on the desktop.

### I want my task to show as an appointment in my Outlook and not as a Task. How do I change this?

In the “**Add Task**” or “**Edit Task**” window, beneath the Due Date is the option to “**Synchronize as**” **Outlook Task** or **Calendar Appointment**. Select **Calendar Appointment** and then click **OK** to save.

**NOTE:** This feature is available in ACL version 5.0.165.0 or newer. Outlook integration settings in ACL then need to be configured.

### In the Task Manager pane, I want to see all Tasks that are assigned to me – how do I do this?

In the Task Manager pane, at the top of the window, it should read either “**My Tasks**” or “**File Tasks**” – if it reads “**File Tasks**”, click on it to select “**My Tasks**”. If you prefer to keep the main filter set to “**File Tasks**”, then you can see just your tasks in a particular file by selecting “**Show only my tasks**” in the secondary filter located further down the window.

### Is there a document I can create that will show a list of all tasks on a specific file?

Yes. Highlight the file for which you’d like to see the tasks report. Ensure that the filter on the Task Manager Pane is set to “**File Tasks**” and then select the “**Generate Report**” icon



from the menu directly beneath the filter.

### I have a group of tasks that I need to add to my file. Is there an easy way to accomplish this?

Yes. This can be accomplished by using a **Task Set**. Firstly, your ACL Administrator will need to create the required Task Set in the **Configuration Settings** in ACL. Once that is completed, you can click on the “**Add Task Set**” icon  from the Task Manager pane.

In the “**Add Task Set**” window, select the required Task Set from the drop-down menu (the second field), then complete the dates for the various tasks in the set. Click **OK** to save.

