Chapter 4 Task Manager

Task Manager enables you to manage and keep track of all your office tasks, court matters, appointments and messages.

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4.1 Calendar

Legal Manager Calendar is fully integrated with task-to-do, court matter, and appointment features. You can filter the task by task-to-do, court matter, appointment or file no. Besides, you can view the calendar with the format day, week or timeline at the selection right hand side.

- To open Calendar, on the **SmartLeg@l** navigation, click **Task Manager** and go to **Calendar** then you may view your tasks with calendar.

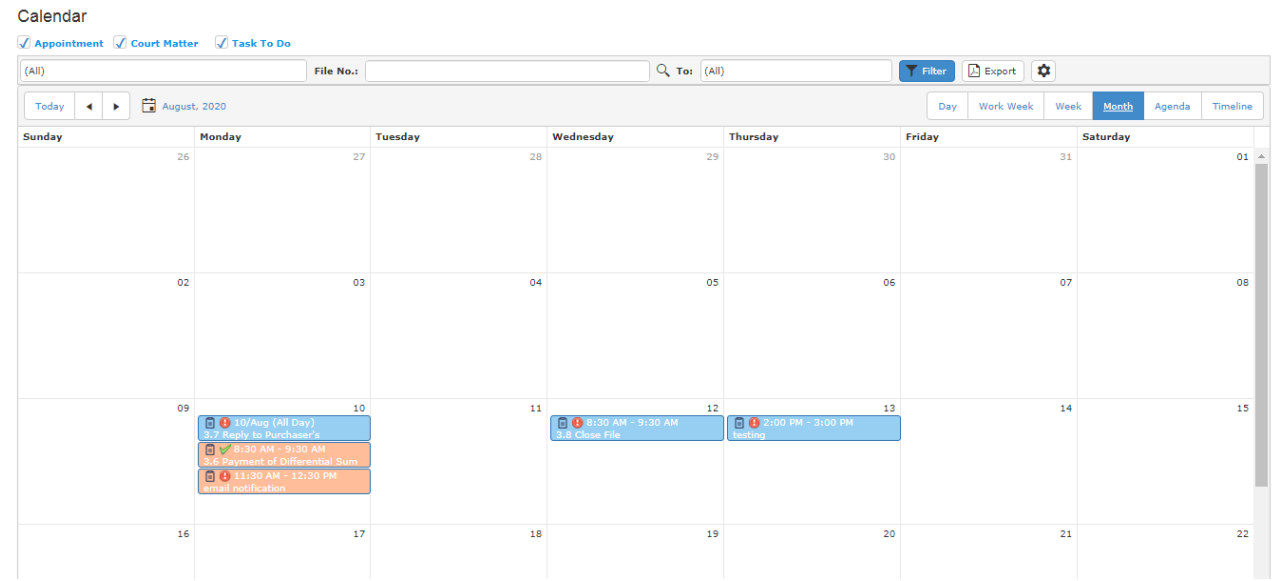


Figure: Calendar

- Right click function provides add, edit, delete, view and save as function.
- A helpful tool tip will show up as shown in 'figure: Calendar Tool Tip', when your mouse pint to a particular task.

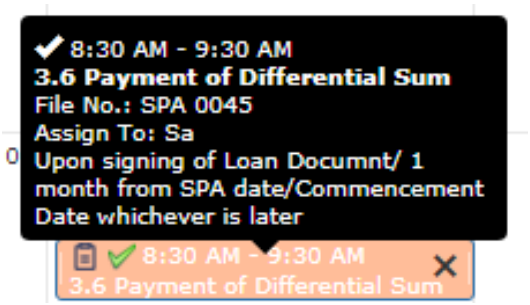


Figure: Calendar Tool Tip

4.2 New Task To-Do

Users and managers can create and assign task to-do, assign priority and reference them to file. Users can copy task to court matter. Retrieval of the task from the menu bar is easy.

- To open New Task To-Do, on the **SmartLeg@l** navigation, click **Task Manager** and go to **New Task To Do** then click the tab you want to type in information.

  - Task To-Do form will show up, as shown in 'Figure: New Task To Do'.
  - In the Task Name box, type a task name.
  - Complete all other information.
  - You can assign task to a user.

- You can CC task to more than one user.
- Due date is optional and must be greater than or equal to start date.
- Click '**Save**'.

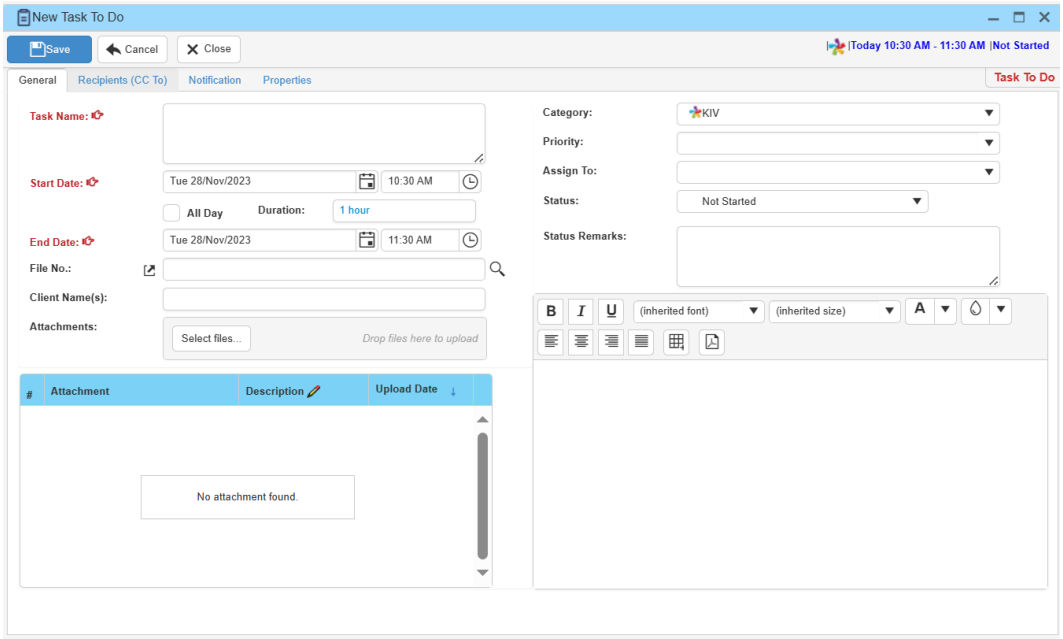


Figure: New Task To Do

- You can Add or Remove Recipient as Figure: New Task To Do – Recipient, Add Recipient
- You can also choose to allow recipient to view or modify

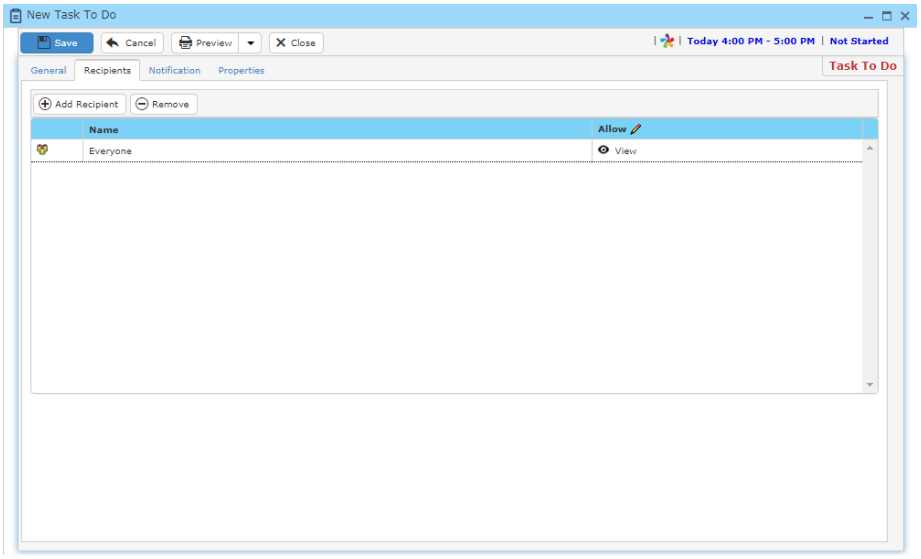


Figure: New Task To Do – Recipients

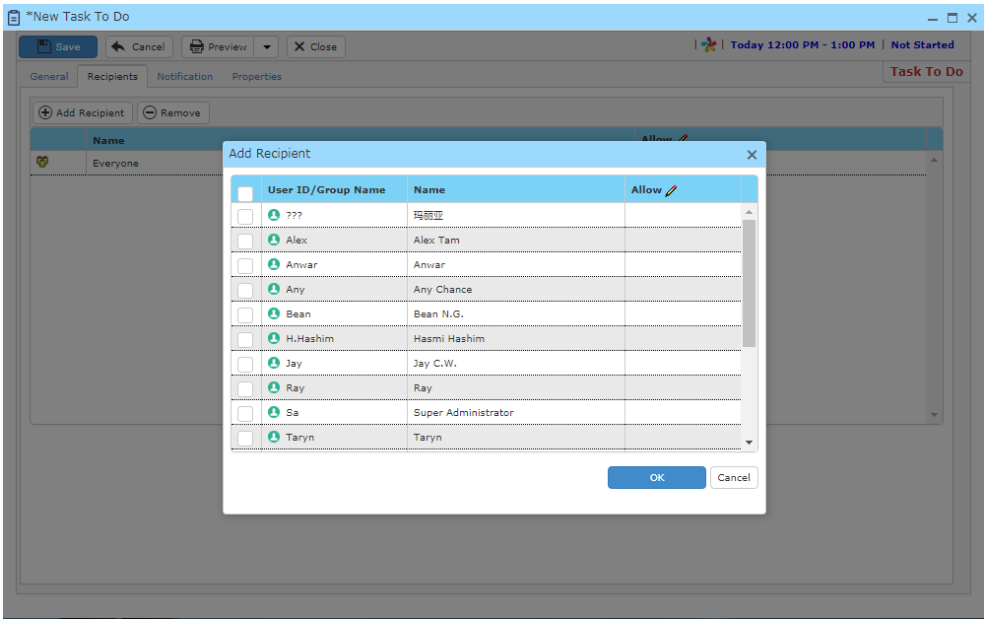


Figure: New Task To Do – Recipient, Add Recipient

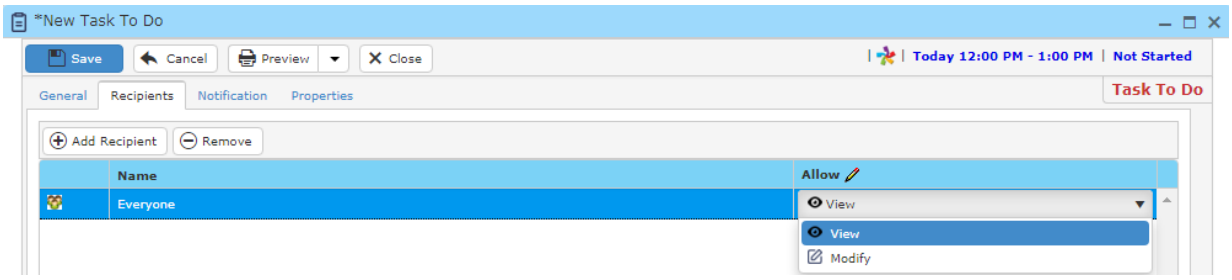


Figure: New Task To Do – Recipient, View/Modify

- You can Add, Add a Copy, Edit and Remove Notification of Task

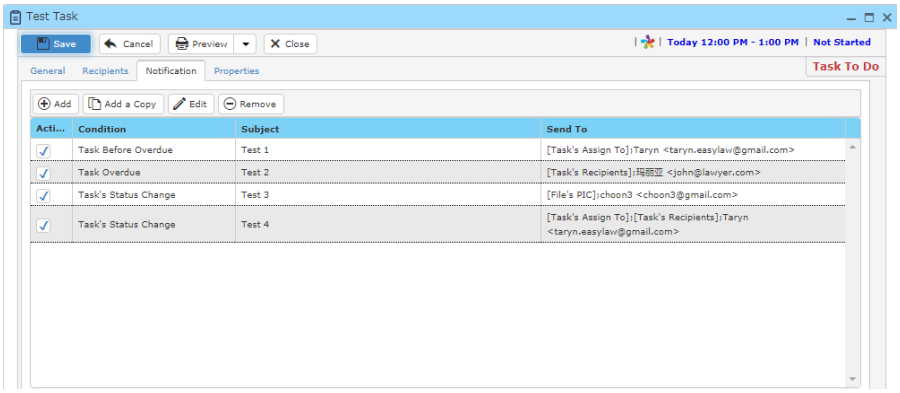
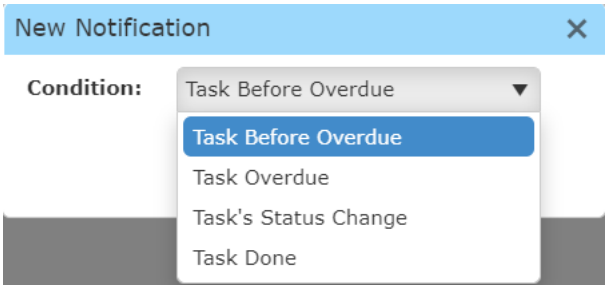


Figure: New Task To Do – Notification

- You have to select a condition before adding a new notification



There are few conditions for the notification as figure above shown:

1. Task Before Overdue -System will send mail to remind recipient before the task assigned overdue, the time to sent the mail before task overdue can set by user.

2. Task Overdue - As simple as the condition mention, the system will send mail to tell recipient that the task assigned already overdue

3. Task's Status Change – System will inform recipient once the task's status amended

4. Task Done – System will send mail to related recipient when the task completed

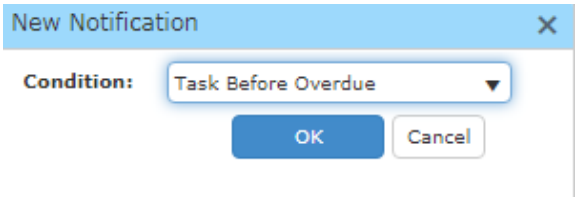


Figure: New Task To Do – Notification - Add Notification, Condition

- Fill in new notification details

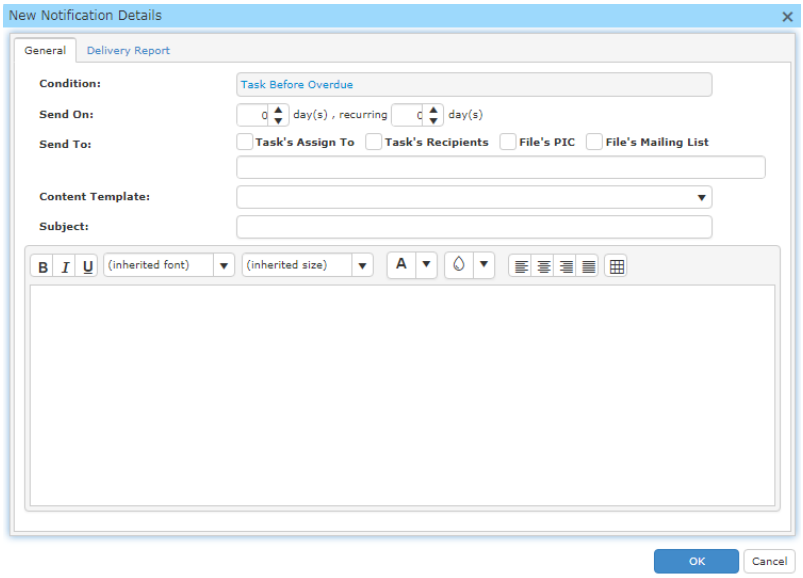


Figure: New Task To Do – Notification – Add Notification, New Notification Details

- You can view the information of the task once who modify the supplier then there will show the last modified and modified by who
- Once you finish all the instruction above, click 'Save' then you are done to create a new task.

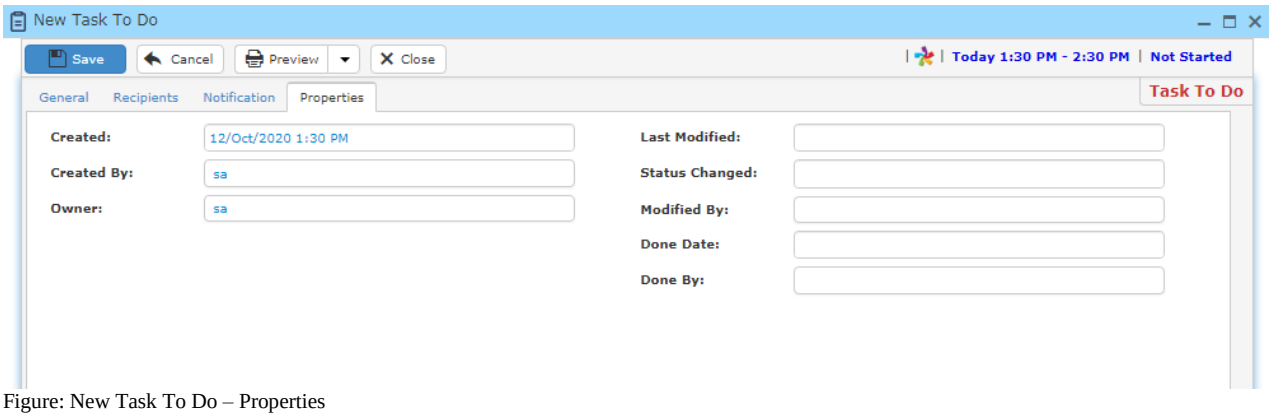


Figure: New Task To Do – Properties

4.3 Manage Task To-Do

This option enables you to add, edit, and delete a task. It also allows you to keep track of task details and all related information.

- To open Manage Task To-Do, on the **SmartLeg@l** navigation, click **Task Manager** and go to **Manage Task To-Do** then search the task you wish to modify.

Manage Task To-Do

- Search the task you wish to manage through type the search criteria or search by advanced.
- To start a new search or to clear the search results, click '**Clear**'.

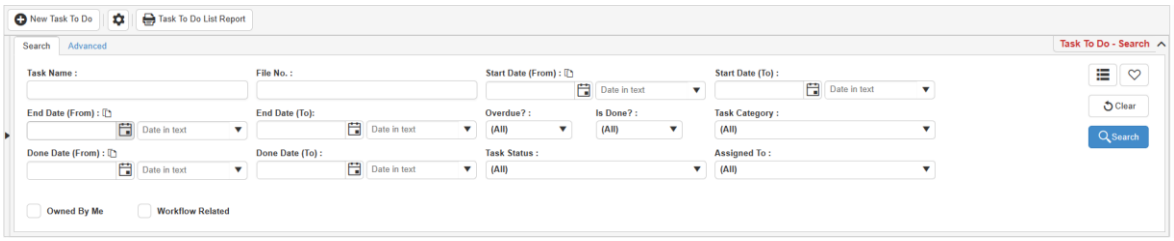


Figure: Manage Task To Do – Search

Advanced Search

- This function can be used to find a task by searching other information that is not captured in the 'General' section.

- Define search criteria:
  - **Field** - Choose the field you want to search.
  - **Condition** - Search condition
  - **Value** - Type in the detail you want to find.

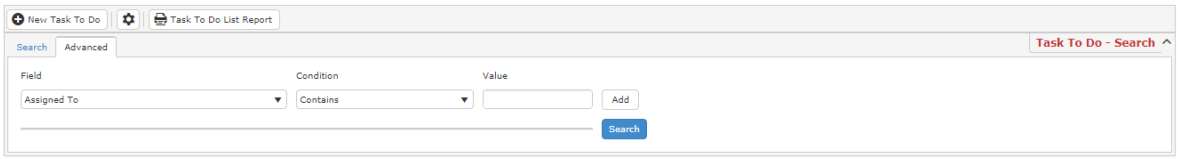


Figure: Manage Task To Do – Advanced Search

Searched Result

- Click '**Search**' once, to show all Tasks
- The Searched result will appeal at below, otherwise it will shown no record availble if the file you searched do not exist.

Click '**Export**' to print the desired search results in txt, excel or html format.

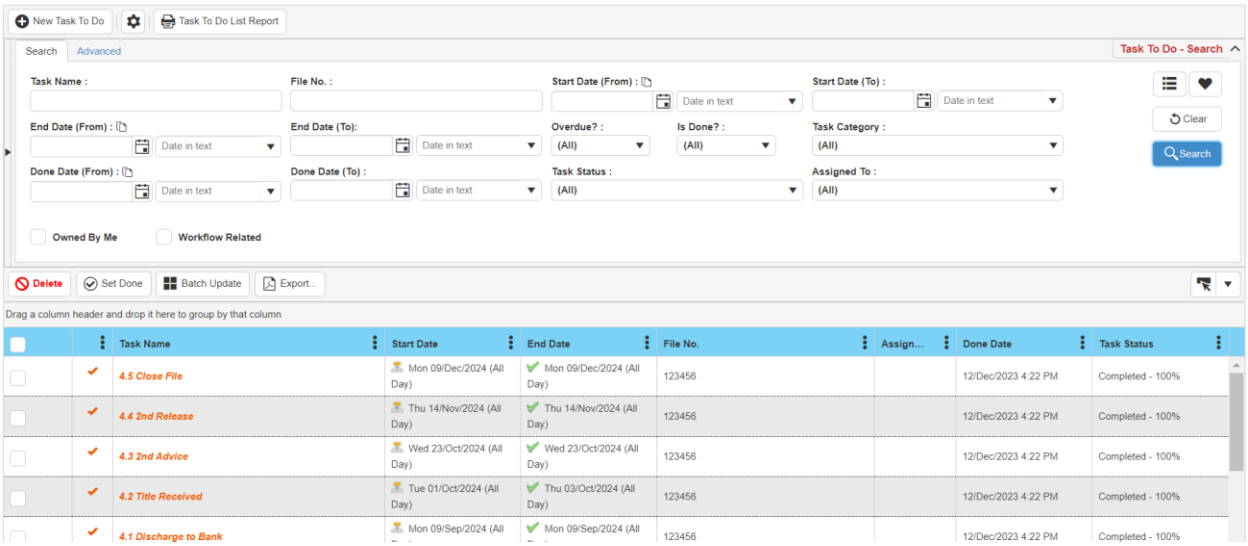


Figure: Manage Task To Do – Search All Tasks

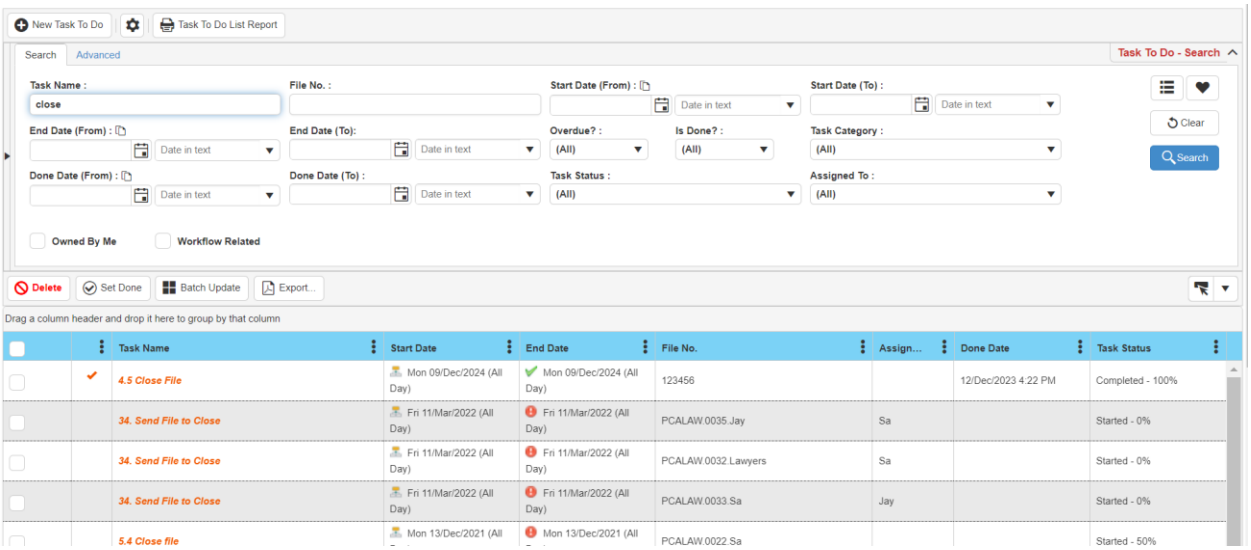


Figure: Manage Task To Do – Search Result

- After the task your search result appears, you can choose to view and manage to edit those details by double-clicking the record.

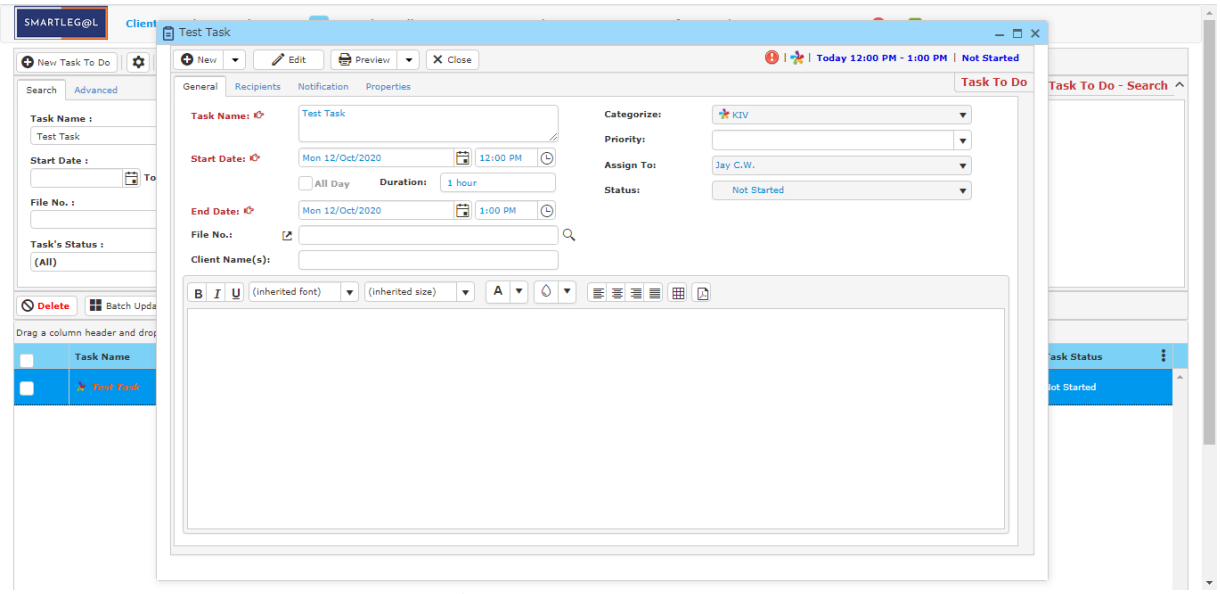
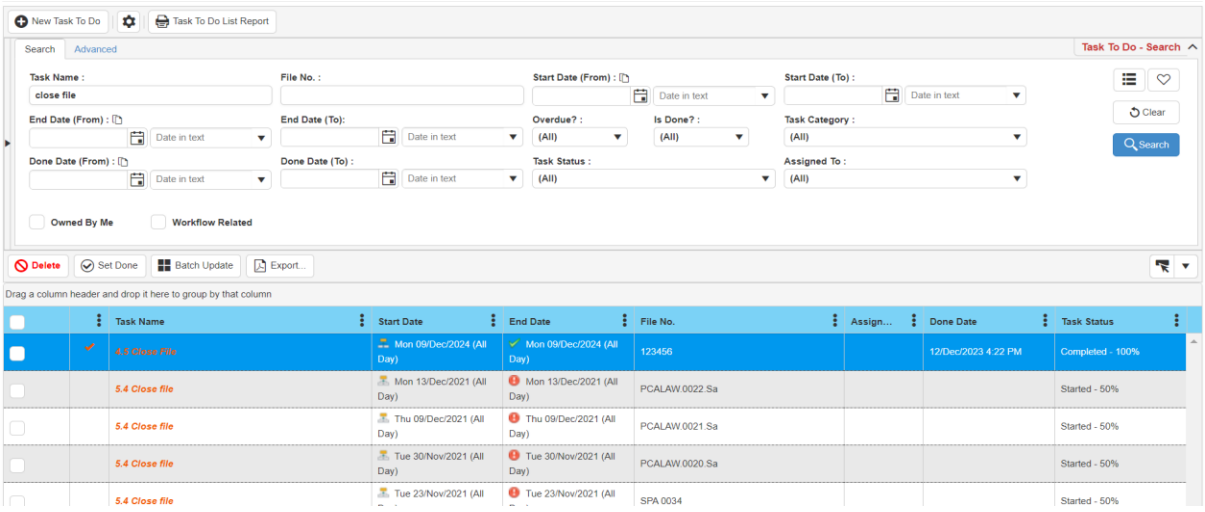


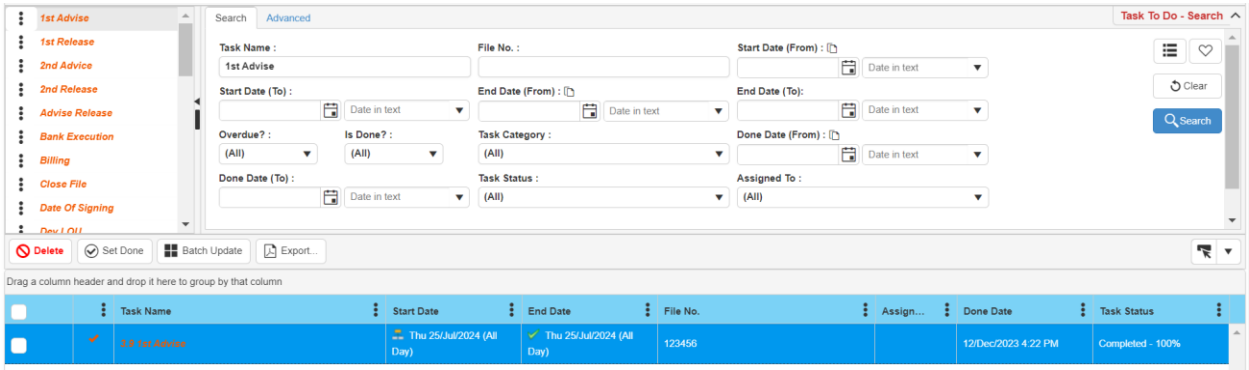
Figure: Manage Task To Do – Search Result, Task Info

Task Shortcut

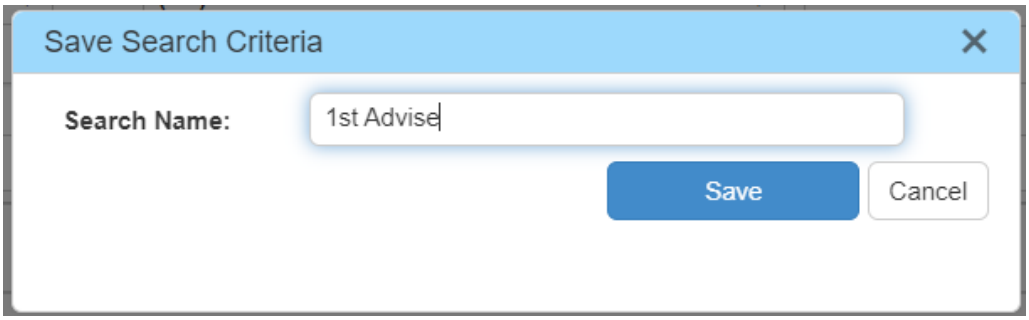
The task shortcut is different for every user based on their favorite tag.



- Fill in the task name and click on the **"Search"** button.

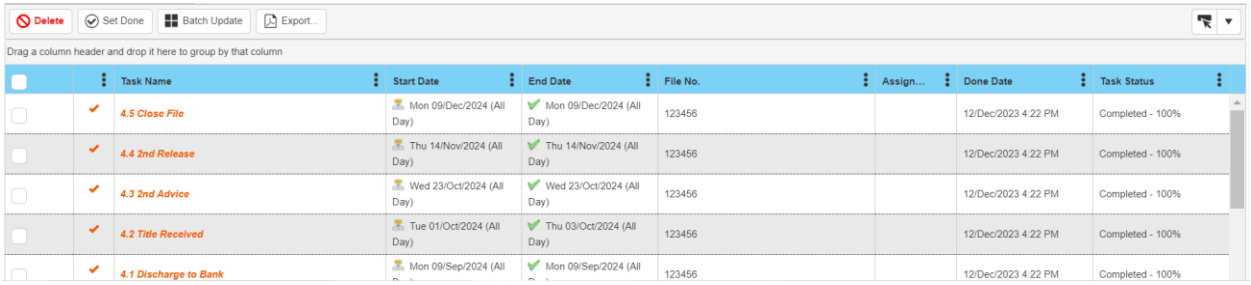


- Then, press the **"Save/Update Search Criteria(s)"** button and it will be listed on the **"Saved Criteria List"**.

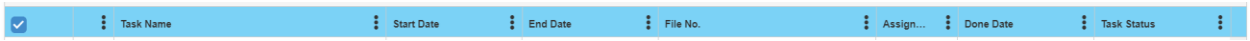


- The **"Save Search Criteria"** will pop up. Users can key in the search name and save.

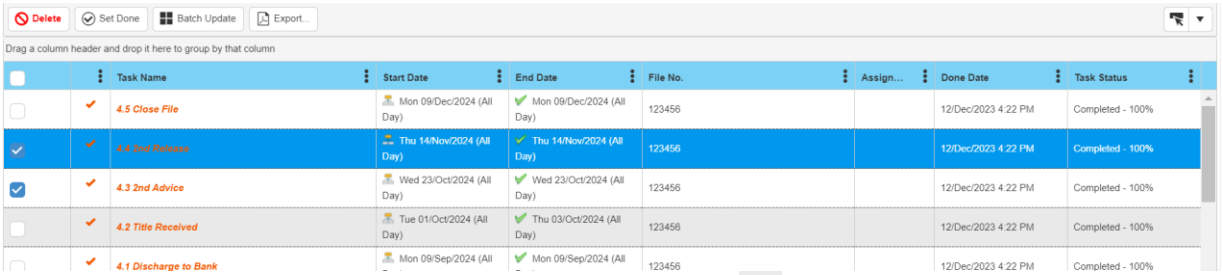
Set Done



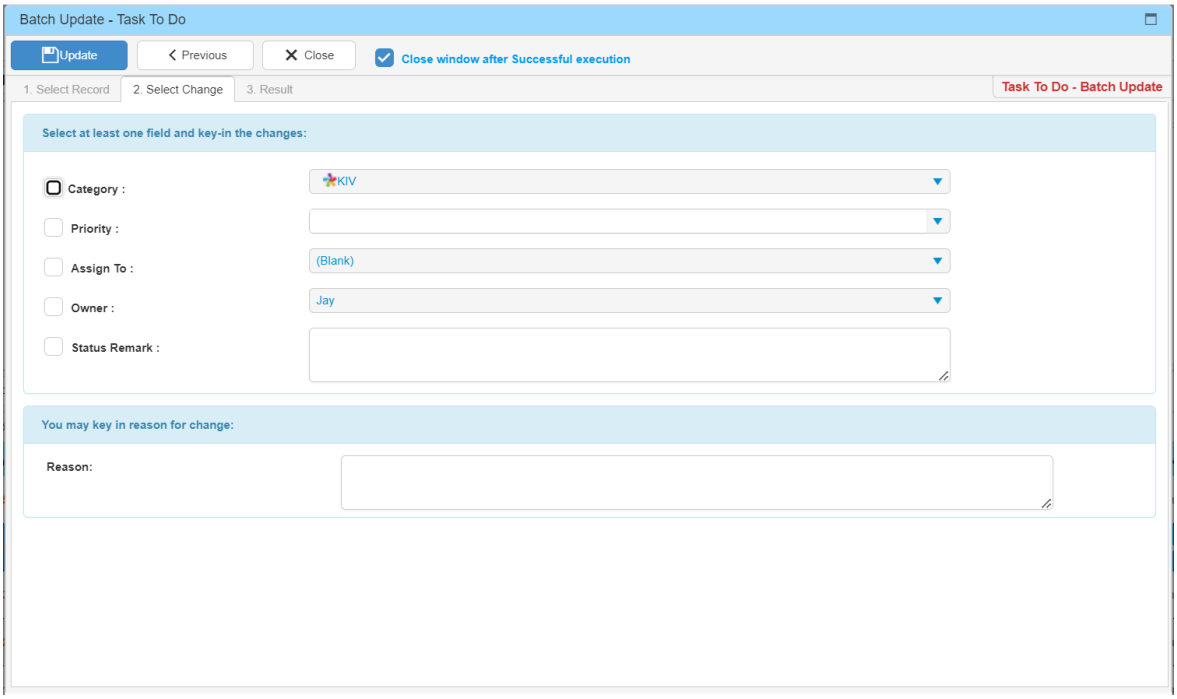
- To set the task done, user may click on the checkbox on the leftmost column. If the user wants to set all the related tasks done they can click on the checkbox on the topmost blue row as below.



Batch Update



- Select the task(s) that you want to edit, and click on the checkbox. Then click **"Batch Update"**.

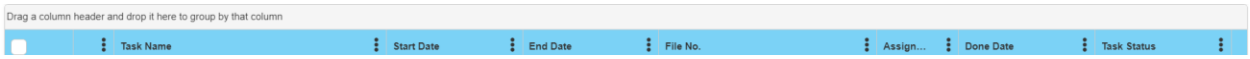


- Select/tick the checkbox and make changes on the particular field(s).
- After filling up all details with specific fields, press on **"Update"**

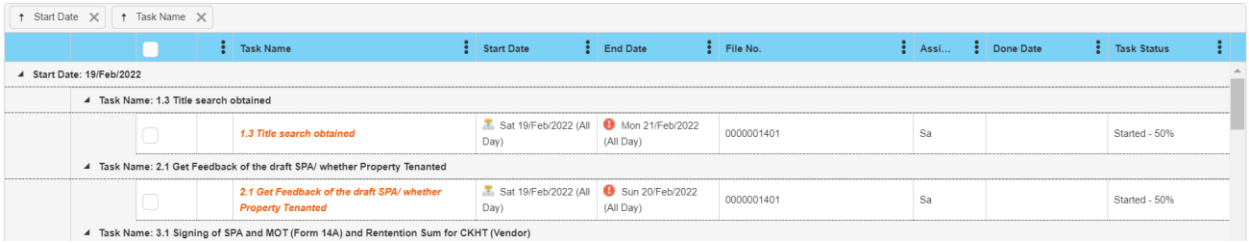
button.

Schedule

- Drag the column headers to the row above the column header accordingly.



Result:



4.4 New Court Matter

You can create court matter and reference them to file. You can also copy court matter to task. Retrieval of the court matter from the menu bar is easy.

- To open New Court Matter, on the **SmartLeg@l** navigation, click **Task Manager** and go to **New Court Matter** then click the tab you want to type in information.

  - You can open court matter input form by clicking.
  - Court Matter form will show up as shown in '*Figure: New Court Matter General Input* 'below.
  - In the Task Name box, type a task name.
  - Complete any other necessary information.
  - Click '**Save**'.

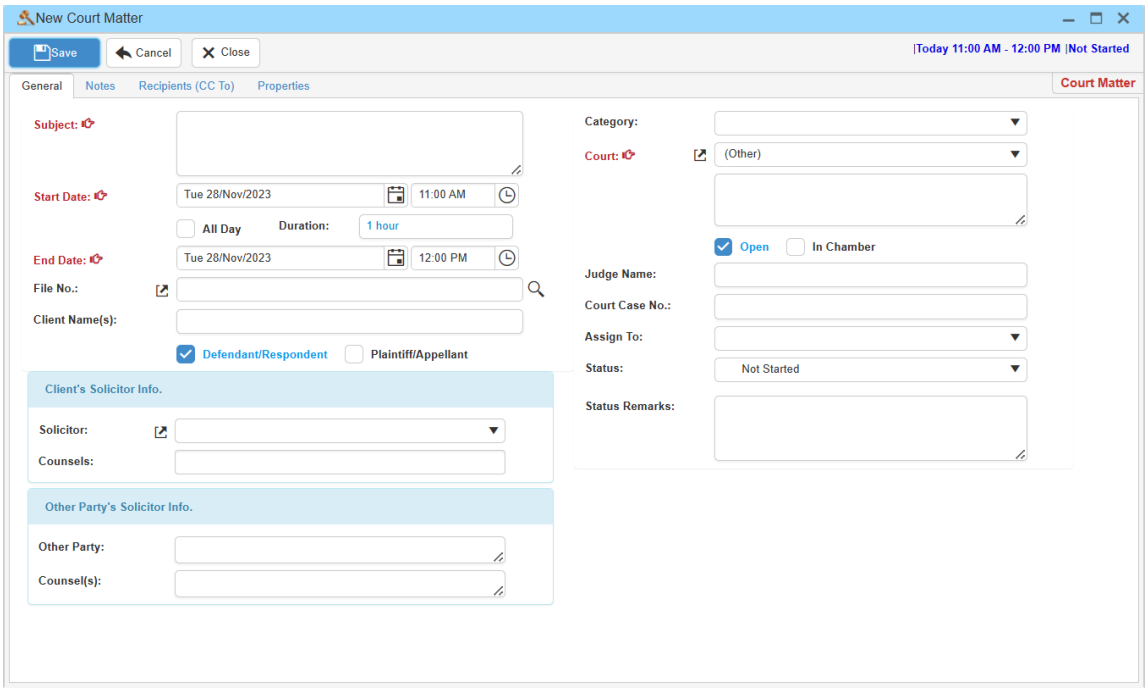


Figure: New Court Matter General Input

- You can add some note in this court matter as a reminder

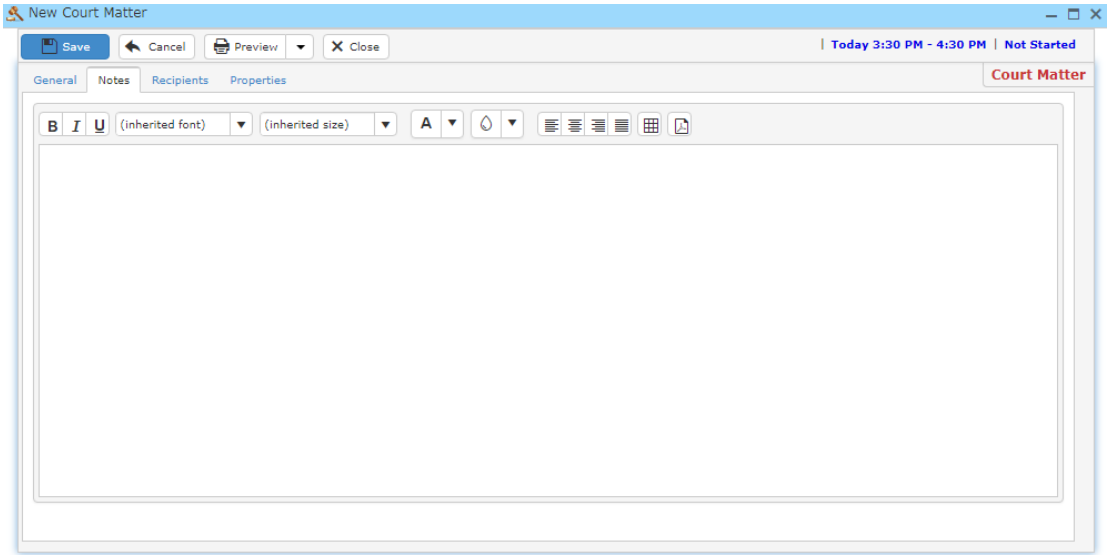


Figure: New Court Matter - Note

Note: Function of Recipients and Properties in New Court Matter is exactly same in **4.2 New Task To Do**.

4.5 Manage Court Matter

This option enables you to add, edit, and delete a court matter. It also allows you to keep track of court matter details and all related information.

- To open Manage Court Matter, on the **SmartLeg@l** navigation, click **Task Manager** and go to **Manage Court Matter** then search the court matter you wish to modify.

Manage Court Matter

- Search the court matter you wish to manage through type the search criteria.
- To start a new search or to clear the search results, click '**Clear**'.

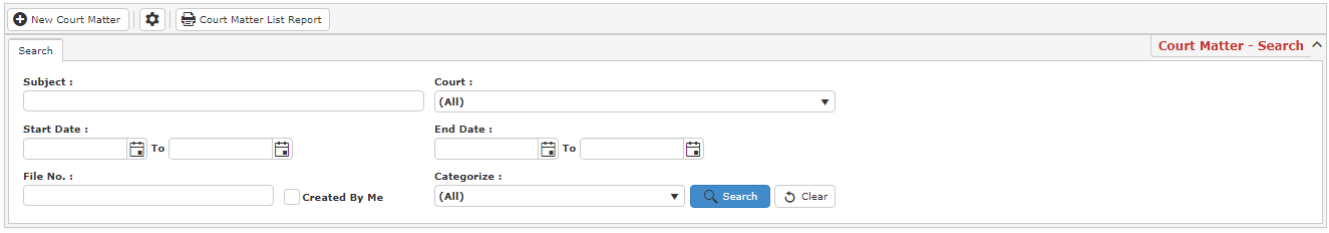


Figure: Manage Court Matter – Search

Searched Result

- Click '**Search**' once, to show all Court Matters

- The Searched result will appeal at below, otherwise it will shown no record availble if the client you searched do not exist.
- Click '**Delete**' to delete the selected record.

- Click '**Export**' to print the desired search results in txt, excel or html format.
- Click '**Download(Zip)**' to download the zipped document.

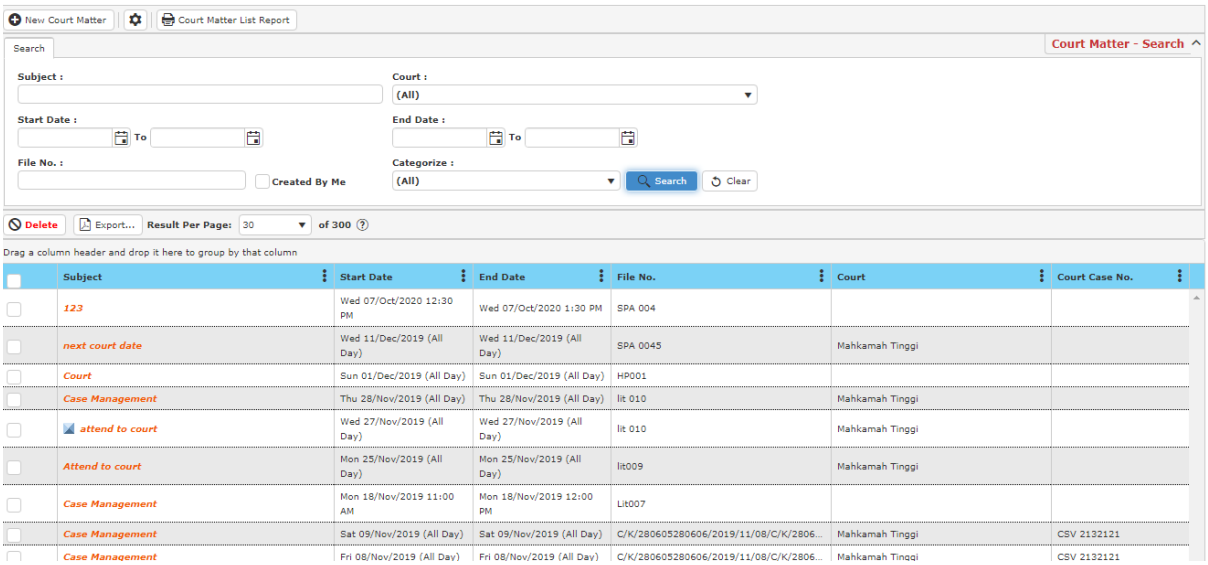


Figure: Manage Court Matter – Search All Court Matters

- After the court matter you searched appeal, you can choose to edit or preview the court matter.

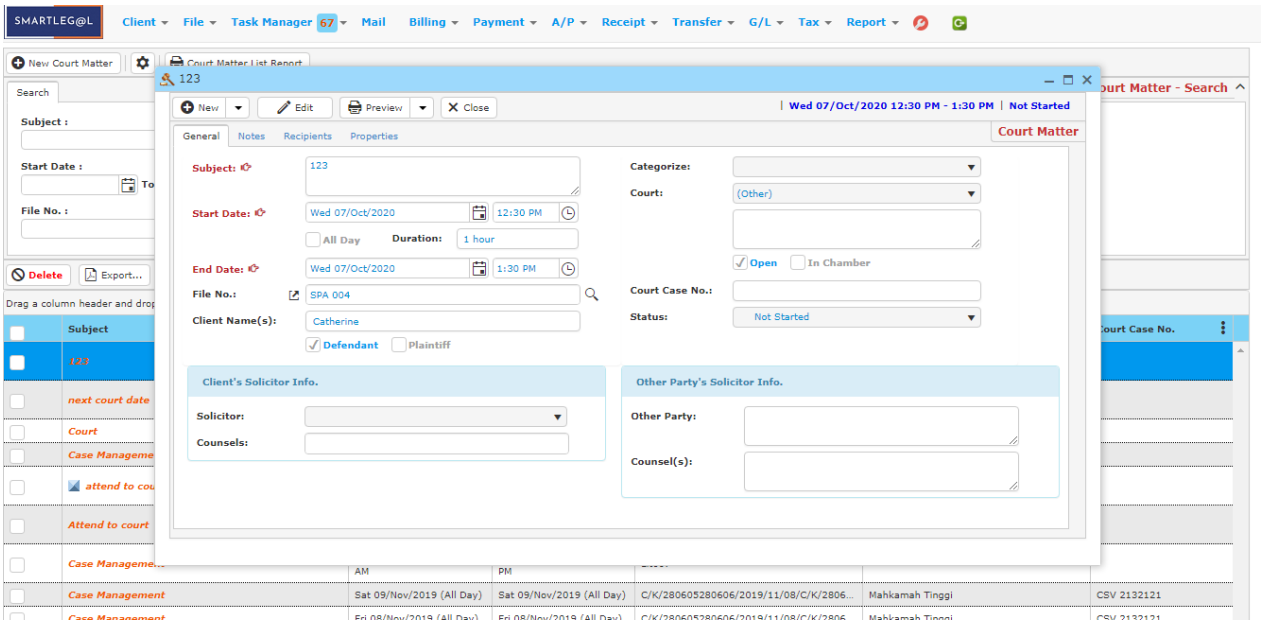


Figure: Manage Court Matter – Search Result, Court Matter Info

4.6 New Appointment

Users can create appointment and reference them to file and give permission to schedule or make changes to appointments in their calendars.

- To open New Appointment, on the **SmartLeg@l** navigation, click **Task Manager** and go to **New Appointment** then click the tab you want to type in information.

  - You can open court matter input form by clicking.
  - Court Matter form will show up as shown in '*Figure: New Appointment General Input'* below.
  - In the Task Name box, type a task name.
  - Complete any other necessary information.
  - Click '**Save**'.

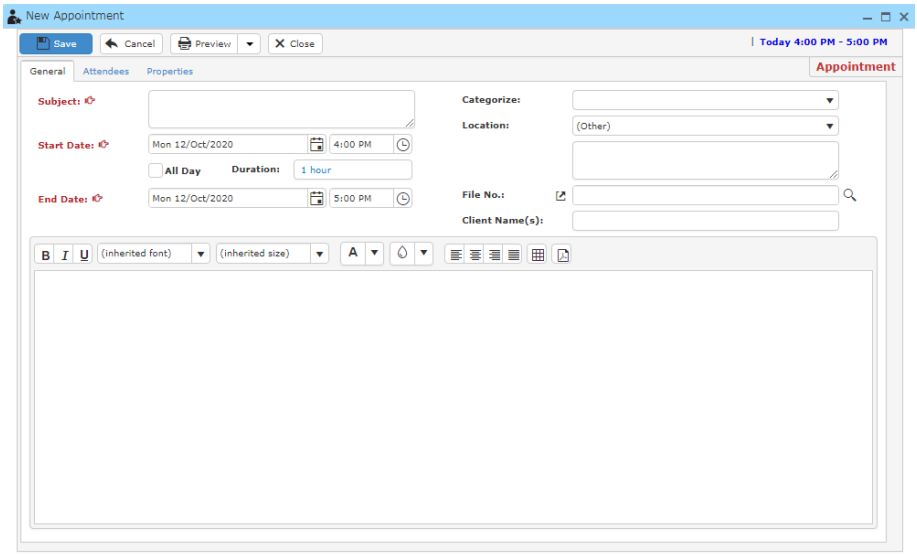


Figure: New Appointment General Input

- You can Add or Remove Attendees as 'Figure: New Appointment – Attendee, Add Attendees'
- You can also choose to allow attendees to view, invite or modify

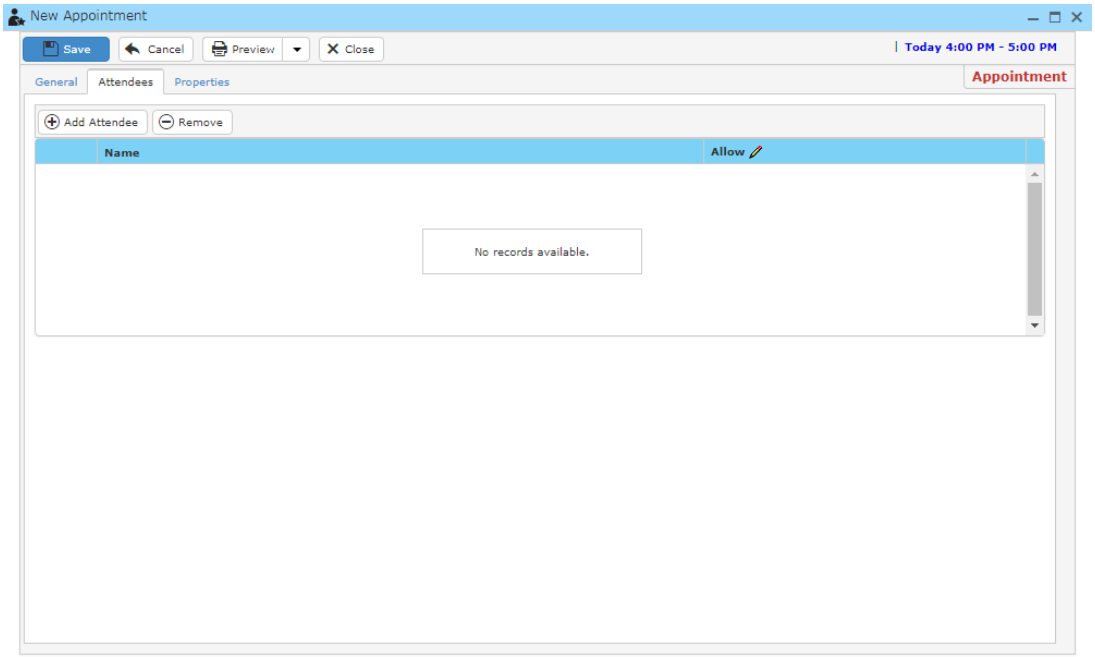


Figure: New Appointment –Attendees

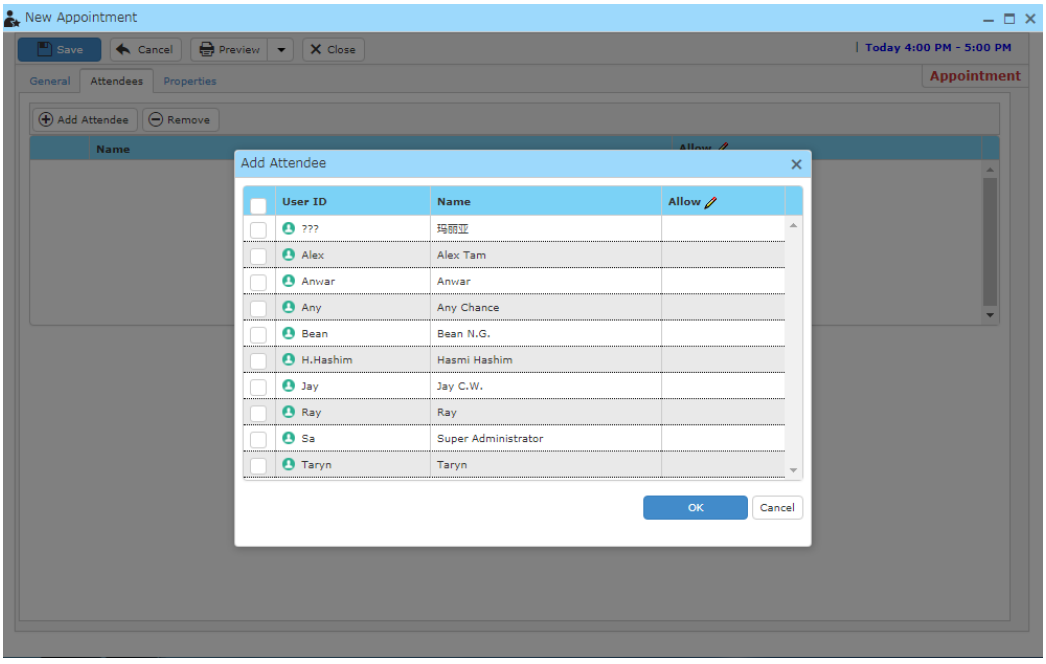


Figure: New Appointment – Attendees, Add Attendees

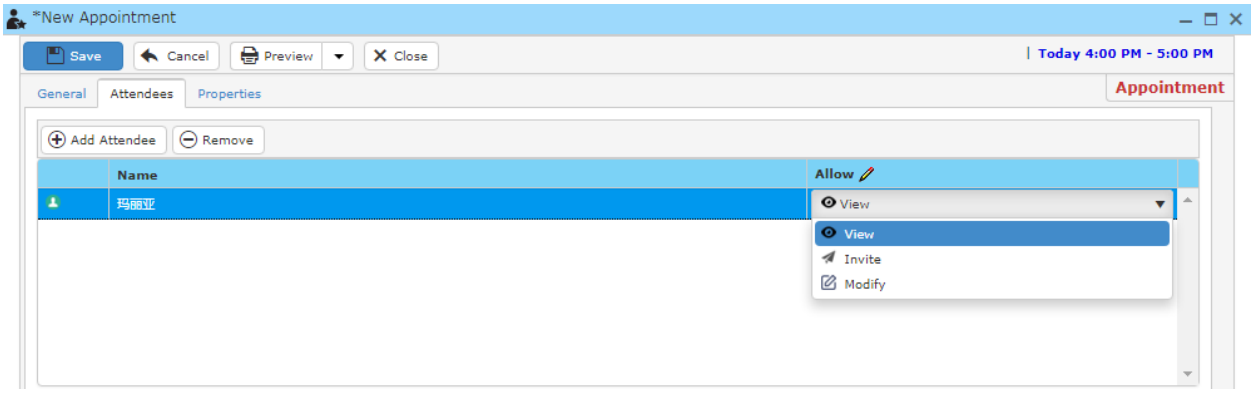


Figure: New Appointment –Attendees, View/Invite/Modify

- You can choose to allow attendees to view, invite or modify by selecting from the combo box

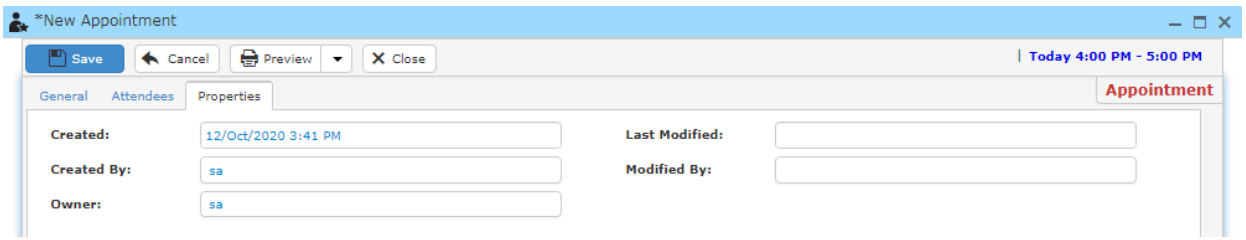


Figure: New Appointment – Properties

4.7 Manage Appointment

This option enables you to add, edit, and delete appointment. It also allows you to keep track of appointment details and all related information.

- To open Manage Appointment, on the **SmartLeg@l** navigation, click **Task Manager** and go to **Manage Appointment** then search the court matter you wish to modify.

Manage Appointment

- Search the appointment you wish to manage through type the search criteria.
- To start a new search or to clear the search results, click '**Clear**'.

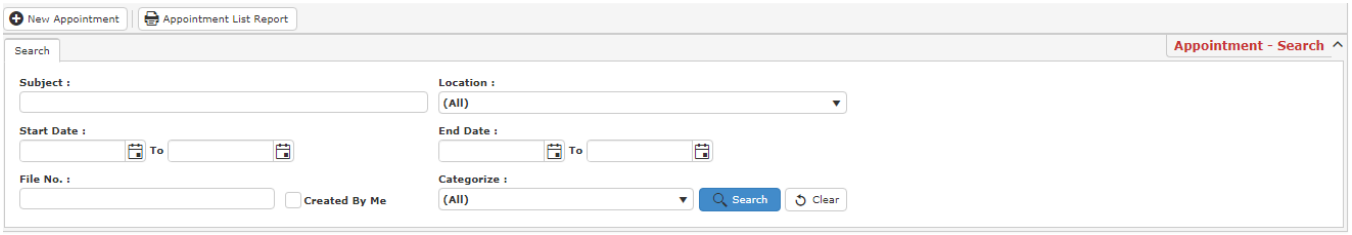


Figure: Manage Appointment – Search

Searched Result

- Click '**Search**' once, to show all appointment
- The Searched result will appeal at below, otherwise it will shown no record availble if the client you searched do not exist.
- Click '**Delete**' to delete the selected record.

- Click '**Export**' to print the desired search results in txt, excel or html format.
- Click '**Download(Zip)**' to download the zipped document.

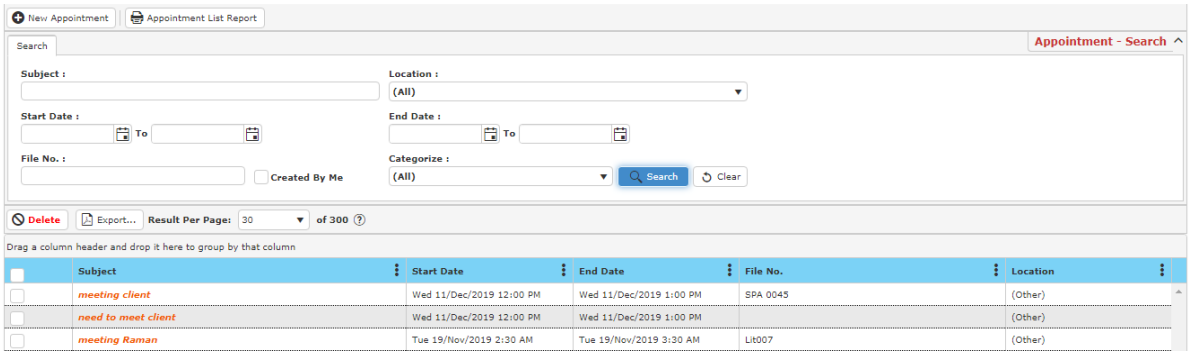


Figure: Manage Appointment – Search All Appointment

- After the appointment you searched appeal, you can choose to edit or preview the appointment.

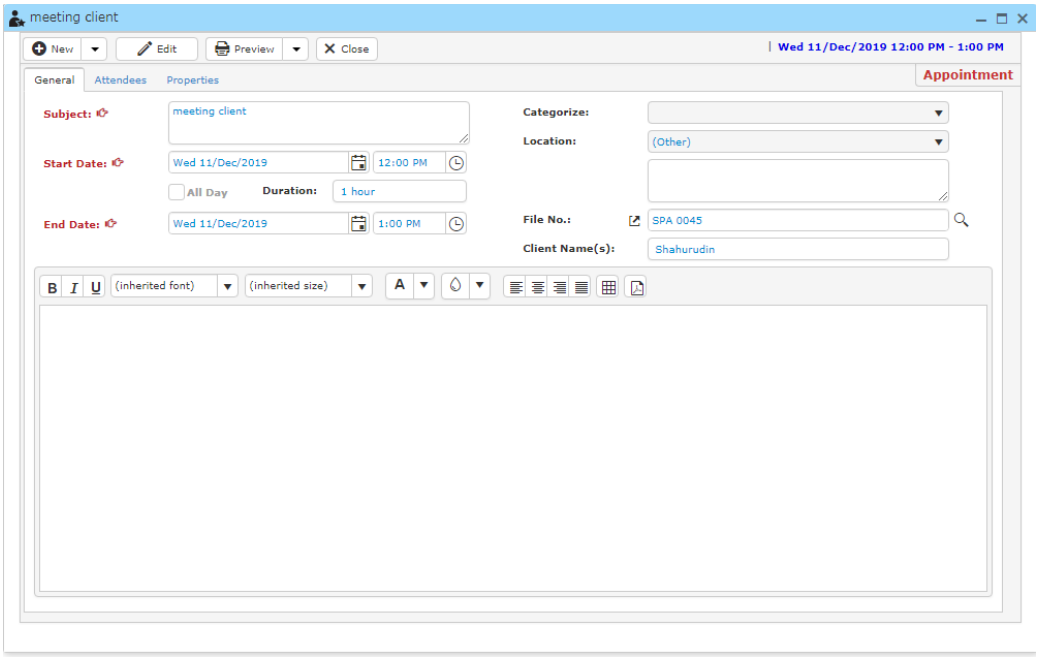


Figure: Manage Appointment – Search Result, Appointment Info

4.8 Reminder List

This option reminding you to view tasks.

- To open Reminder List, on the **SmartLeg@l** navigation, click **Task Manager** and go to **Reminder Lis**.
- You can view selected task by double clicking on the reminder list.

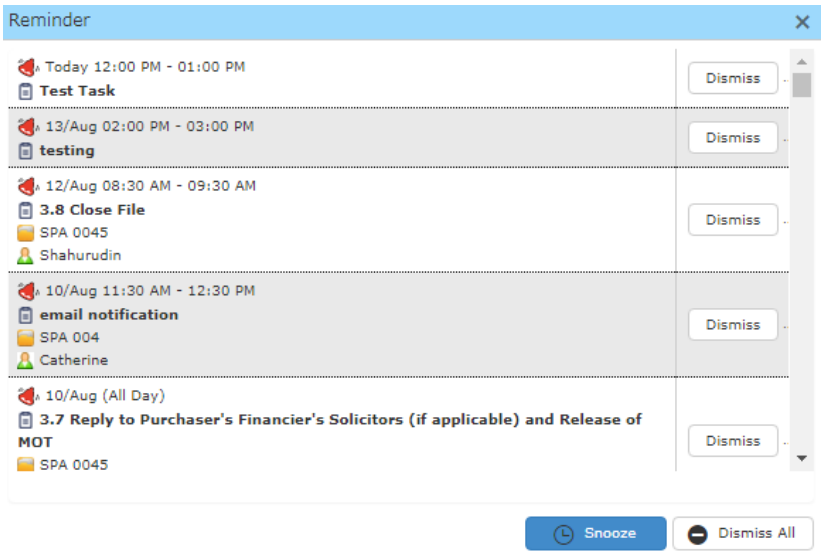


Figure: Reminder List