

How to Manage Tasks in LEXZUR

Objectives

- Insert a new Task
- Correct/Revise/Update data related to an existing Task
- Capture and manage a Task's details

Steps

In LEXZUR, you can easily and efficiently manage your Tasks. First, from the **Task module** in the main menu, you can access all the tasks or the tasks requested by you.

All Tasks

My TasksRequested by meContributed by Me

1 - 20 of 253 items

Search

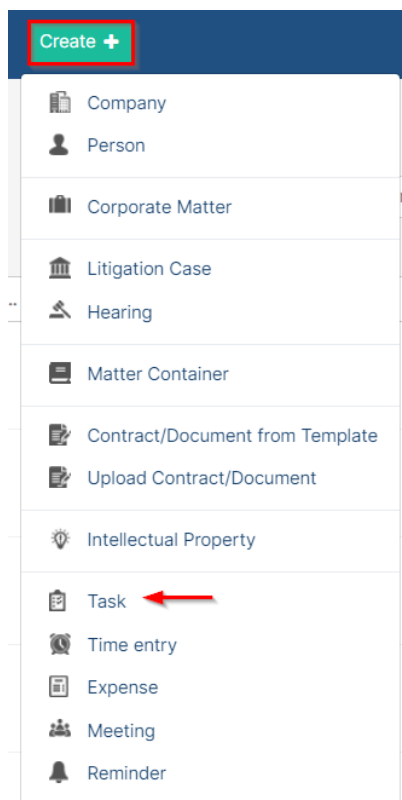
AdvancedWorkflow Status Filter

Columns

ExportTools

<input type="checkbox"/>	ID	Title	Matter Name	Type	Related Contract/...	Description	Assigned to	Due Date	Workflow Status
<input type="checkbox"/>	T00000309	To do 12334	Legal Opinion on Service Agreement	To-Do			Alice Jones	2023-09-18	Working on it
<input type="checkbox"/>	T00000308	Attach documents related to the matter	Legal Opinion on Service Agreement	Attach Docs on App4legal			Alice Jones	2023-09-28	1-Open
<input type="checkbox"/>	T00000307	Follow up with the client	Risk Manag. Operational Readiness	Follow up			Alice Jones	2023-09-28	1-Open
<input type="checkbox"/>	T00000306	Attach Doc	Risk Manag. Operational Readiness	Attach Docs on App4legal			Alice Jones	2023-09-23	1-Open
<input type="checkbox"/>	T00000305	Review The contract		Contract Revision	Insurance contract Between SEHA and ABC		Aleen Peterson	2023-09-18	1-Open
<input type="checkbox"/>	T00000304	test		Research			James Marven	2023-09-07	1-Open
<input type="checkbox"/>	T00000303	Schedule a meeting for wednesday	Albert company Case	Expert Meeting			Carolina Robinson	2023-09-04	Done
<input type="checkbox"/>	T00000302	Attach documents related to the matter	Legal opinion	Attach Docs on App4legal			Carolina Robinson	2023-09-10	1-Open

You can simply add a new Task from the **Create** button in the main menu.



There are 6 mandatory fields to be filled, which are:

- Title: What is needed to be done on this task.
- Task Type: A defined list that can be customized on the fly.
- Assigned to: The User who is going to work on the Task. There is an "Assign to Me" quick button that automatically adds the logged-in user to the field.
- Requested by: The requester of the task.
- Priority: A defined list. Priority serves the color coding on Task Boards.
- Due Date: The end date of the task.

Once you finish, press Save.

New Task

Task Title*

translating the documents

Task Type*

Translation

+ Task Type

Assigned to*

Carolina Robinson

Assign to me

Priority*

High

Due Date*

2023-10-24




Notify me before

Requested by*

Jimmy Peterson

Description

Paragraph

B *I* U   

☒ Send Notification by email

Save

Save and create another

Cancel

Now that you have added your task, you can now manage all the related information. You can start by using advanced filters to help you search for tasks based on your chosen criteria. For example, you can search for tasks that are assigned to a specific user.

Task ID

contains

Matter ID

contains

Task Title

contains

Task Description

contains

Estimated Effort

Equal

Priority

Equal

Select

Task Status

Equal

Select

Related Matter

Look Up

M20, Matter Name or Client Name

Related Contract/Document

Look Up

Start typing

Assigned to

Equal

Alice Jones

Requested By

contains

Start typing

Task Type

Equal

Select

More Filters Criteria

Reset

Submit

[Hide]

All Tasks

My Tasks

Requested by me

Contributed by Me

Export

Tools

1 - 20 of 86 items

Search

Advanced

Workflow Status Filter

Columns

You can click on the Task ID or the Title to open, edit, or capture more information related to the task.

On this page, you can change the workflow status of the task, and edit information related to general information, people, dates, and so on.

T00000308: Attach documents related to the matter

Edit

Comment

Done

Pending Internally

Working on it

General Info

Type: Attach Docs on App4legal

Title: Attach documents related to the matter

Priority: Medium

Related Matter: M00000295 - Legal Opinion on Serv...

Related Contract/Document: None

Requirements: None

Description

Attachments

Drop files to attach or browse.

Checklist

0%

Add

Matter Attachments

Drop files to attach or browse.

Activity

People

Assigned to: Alice Jones

Requested By: James Marven

Contributors: None

Shared With: Public

Created By: James Marven

Modified By: James Marven

Alternative user: None

Company: None

Dates

Due Date: 2023-09-28

Created On: 2023-09-18

Modified On: 2023-09-18

Time Entries

Estimated: Not specified

Remaining: Not specified

Logged: Not specified

You can also add attachments and comments to the task.



Comments are used by the users to collaborate with each other on the task.

Last but not least, you can add checklists to your assigned task. This adds the ability to track progress and the percentage of completion for a given task.

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!