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.

	ID	Title	Matter Name	Type	Related Contract/... Description	Assigned to	Due Date	Workflow Status
☐	T00000309	To do 12334	Legal Opinion on Service Agreement	To-Do		Alice Jones	2023-09-18	Working on it
☐	T00000308	Attach documents related to the matter	Legal Opinion on Service Agreement	Attach Docs on App4legal		Alice Jones	2023-09-28	1-Open
☐	T00000307	Follow up with the client	Risk Manag. Operational Readiness	Follow up		Alice Jones	2023-09-28	1-Open
☐	T00000306	Attach Doc	Risk Manag. Operational Readiness	Attach Docs on App4legal		Alice Jones	2023-09-23	1-Open
☐	T00000305	Review The contract		Contract Revision	Insurance contract Between SEHA and ABC	Aleen Peterson	2023-09-18	1-Open
☐	T00000304	test		Research		James Marven	2023-09-07	1-Open
☐	T00000303	Schedule a meeting for wednesday	Albert company Case	Expert Meeting		Carolina Robinson	2023-09-04	Done
☐	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.
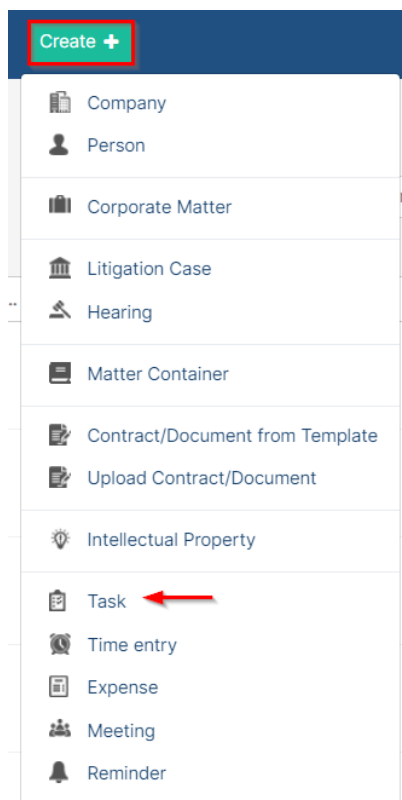
There are 6 mandatory fields to be filled, which are:

- 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*   + Task Type

Translation   ⌄

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.

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.

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!