

How to Delegate Your Work to Other Team Member

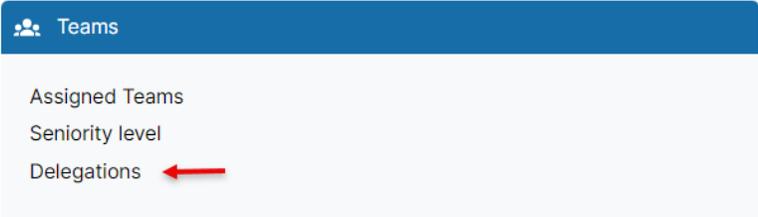
Objectives

- Migrate Matters, tasks, contracts, hearings, etc... to alternative users while the original user is out of the office.

Steps

Delegation allows users to transfer existing matters cases tasks contracts reminders, or future work to others during their absence.

To add a new Delegation you must navigate to **System Settings Teams Delegations**



You can track all previous delegations, the ones in progress, and planned delegations, and cancel, end, or add new ones.

Settings / Delegations [Add](#)

Total Records: 7

From	To	Start Date	End Date	Status	Actions
Carolina Robinson	James Marven	2023-08-17	2023-08-21	Planned	 
Alice Jones	Sam Marven	2023-08-16	2023-08-18	In Progress	 
Alice Jones	Micheal Cavino	2023-05-11	2023-05-12	Ended	 
Alice Jones	Carolina Robinson	2023-04-20	2023-04-25	Canceled	 
James Marven	Sam Marven	2023-04-12	2023-04-19	Canceled	 
Carolina Robinson	Alice Jones	2023-04-06	2023-04-11	Canceled	 
Alice Jones	James Marven	2023-04-03	2023-04-05	Ended	 

As a first step, select the users' names and the period of the delegation (start and end date).

Add Delegation ✕

1
2
3
4
5
6
7
8
9
10

Delegation Details
Tasks
Contracts
Matters
Hearings
Reminders
Meetings
Contracts & Documents Approvals
Contracts & Documents Signatures
Confirmation

From 👤 Carolina Robinson ✕ To 👤 Alice Jones ✕

Start Date 2023-08-17 📅 End Date 2023-08-21 📅

Delegated Modules ←

Tasks

Contracts & Documents

Matters

Hearings

↓

+ Include Statuses

+ Include Statuses

+ Include Statuses

Cancel
Next

Then enable/disable the delegated modules, such as Tasks, Contracts, Matters, Hearings, etc...

You have to include the statuses for Tasks, Contracts, and Matters.

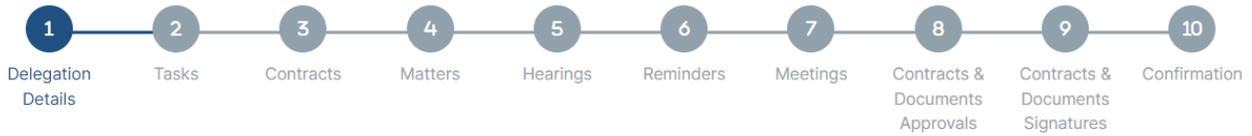
You have the option to predefine statuses from the settings. In the Delegation setup and configuration settings, you can establish default statuses for delegated contracts, tasks, and matters.

Settings / Setup & Configuration

Property	Default Value		Actions
Included Statuses for Contracts ?	<div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">Under Approval ✕</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">Under Negotiation ✕</div>	←	Save
Included Statuses for Corporate/Litigation Cases ?	<div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">2: In Progress ✕</div>	←	Save
Included Statuses for Tasks ?	<div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">1: Open ✕</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">2: In Progress ✕</div>	←	Save

[Save All](#)

Add Delegation



Tasks 1-Open ✕ 2-In Progress ✕

Contracts & Documents Under Review ✕ Under Negotiation ✕

Matters 1-Review ✕

Hearings

Reminders

Meetings

Contracts & Documents

- 1-Review
- 2-In Progress
- 3-Closed
- Cancelled
- Closed

Cancel

Next

In the following steps, you can select specific items to delegate.

Add Delegation ?



Matters

ID	Name	Category	Practice Area	Status	Due Date	Assigned Team
<input checked="" type="checkbox"/> M0000075	Partnership Agreement	Matter	Agreement	Open		All Teams
<input checked="" type="checkbox"/> M00000177	Lauren Travis Vs Basil Crown	Litigation	Insurance	Open		All Teams
<input checked="" type="checkbox"/> M00000178	Legal Consultation for Paul Jones	Matter	Consultation	Open		All Teams
<input type="checkbox"/> M00000227	Administrative Litigation Case- Business Department	Litigation	Administrative	Open		All Teams
<input type="checkbox"/> M00000241	Albert Insurance Case	Litigation	Insurance	Open		All Teams

Cancel

Back

Next

You can also assign contracts awaiting your approval and signature to alternative users.

Add Delegation ?



Contracts & Documents Approvals

Contract/Document ID	Name	Status	Order	Parties	Workflow Status	Label	Date
<input checked="" type="checkbox"/> CT15	BaileyChris and Coolpany Contract	Pending	3	Bailey Chris, Coolpany Insurance company	Under Negotiation	Head of Department	2022-01-20
<input checked="" type="checkbox"/> CT85	Agreement-BC	Awaiting Approval	1		Filing & Drafting	Head of Legal Department	
<input checked="" type="checkbox"/> CT86	NDA-Adam	Awaiting Approval	1	Adam Skims, Branding Company	Filing & Drafting	Head of Legal Department	2022-06-02
<input type="checkbox"/> CT88	Sales Agreement	Awaiting Approval	1	Back-Line	Under Approval	Head of Finance	2022-07-09

Cancel

Back

Next

The final step will be the confirmation, therefore confirm the added delegation and you can choose to revert back the Matters and Contracts once the delegation ends.

Add Delegation ?



Do you wish to revert back the Matters and Contracts once the delegation ends?

Cancel

Back

Submit

Both users will receive email notifications with all the delegation details.



The alternative user will be added to the assigned teams that the original user belongs to on the reassignment of cases and contracts.



As soon as the delegation begins, the original user will be automatically set as "out of office". Learn more about how to enable the Out-of-Office feature in [this guide](#).

A new delegation has been submitted from Carolina Robinson to James Marven between August 17, 2023 and August 21, 2023

Matters:

- [M00000075](#): Partnership Agreement
- [M00000177](#): Lauren Travis Vs Basil Crown
- [M00000178](#): Legal Consultation for Paul Jones

Contracts & Documents Approvals:

- [CT15](#): BaileyChris and Coolpany Contract
- [CT85](#): Agreement-BC
- [CT86](#): NDA-Adam
- [CT353](#): Franchise Agreement

Contracts & Documents Signatures:

- [CT344](#): NDA-Alvah Agency

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

Thank you!