Tasks & To-Do Lists Manual

This manual is designed to help users understand Tasks and the To-Do List in OnePractice.

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Tasks

Tasking has been designed to be easy to use and integrate with time recording.

Tasks can be created at client level, matter level or they can be personal (and not assigned to a client).

Tasks can be assigned to other team members. This can continue the advance of work on a matter and to push a task from one person once they have done their part onto the next person to complete their portion of the task.

The To-Do List screen will display all Assigned Tasks and Personal Tasks for the logged in user, and any tasks on clients and/or matters where that user is in the team (NOTE: this is not the same as Teams for Management Reporting, it is the team assigned to the client or matter).

Client and matter tasks can be viewed by all users in the Tasks dashboard. There is a Permission that can be set under various roles to only allow certain users to "Administer all tasks" (edit tasks, delete, dismiss) created by others.

Personal tasks are only viewable by the user who created them.

Creating a Task

To a client

To create a task directly to a client, access the client required, click onto the Tasks tab and use the green plus to add (see Figure 1 below).

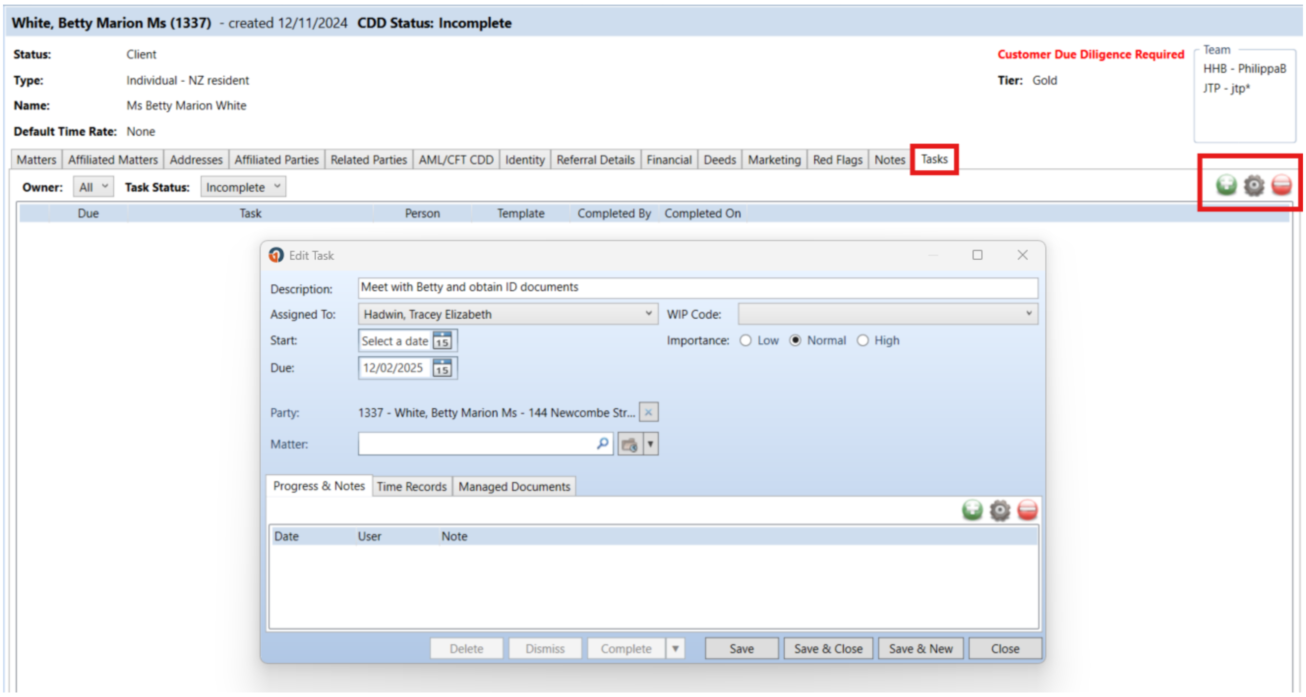

Figure 1.

To a matter

To create a task directly to a matter, access the matter required, click the Tasks tab and use the green plus to add (see Figure 2 below).

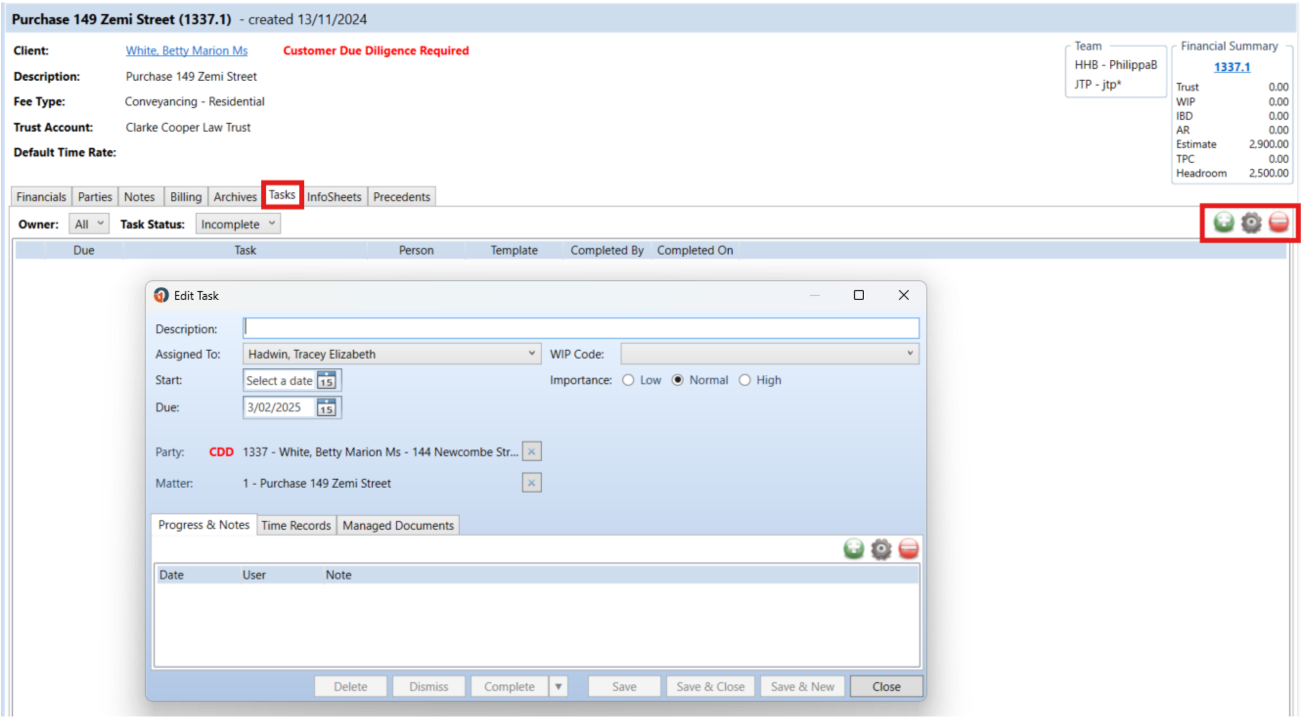

Figure 2.

Personal Tasks

When creating a Personal Task, do not complete the Party or Matter fields. Create a personal task from the top of the To Do list by adding the information, then pushing 'Tab.'

Creating an Assigned Task from the To-Do List

Type in the task subject, press 'Enter' and the Edit Task screen will be displayed with the subject completed, allowing the user to fill in the remainder of the details. Assign a task to yourself or any other user (See Figures 3 & 4 below)

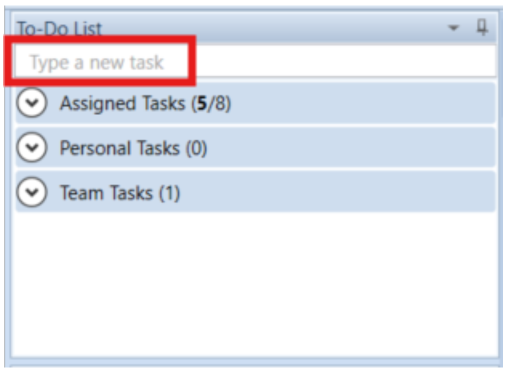

Figure 3.

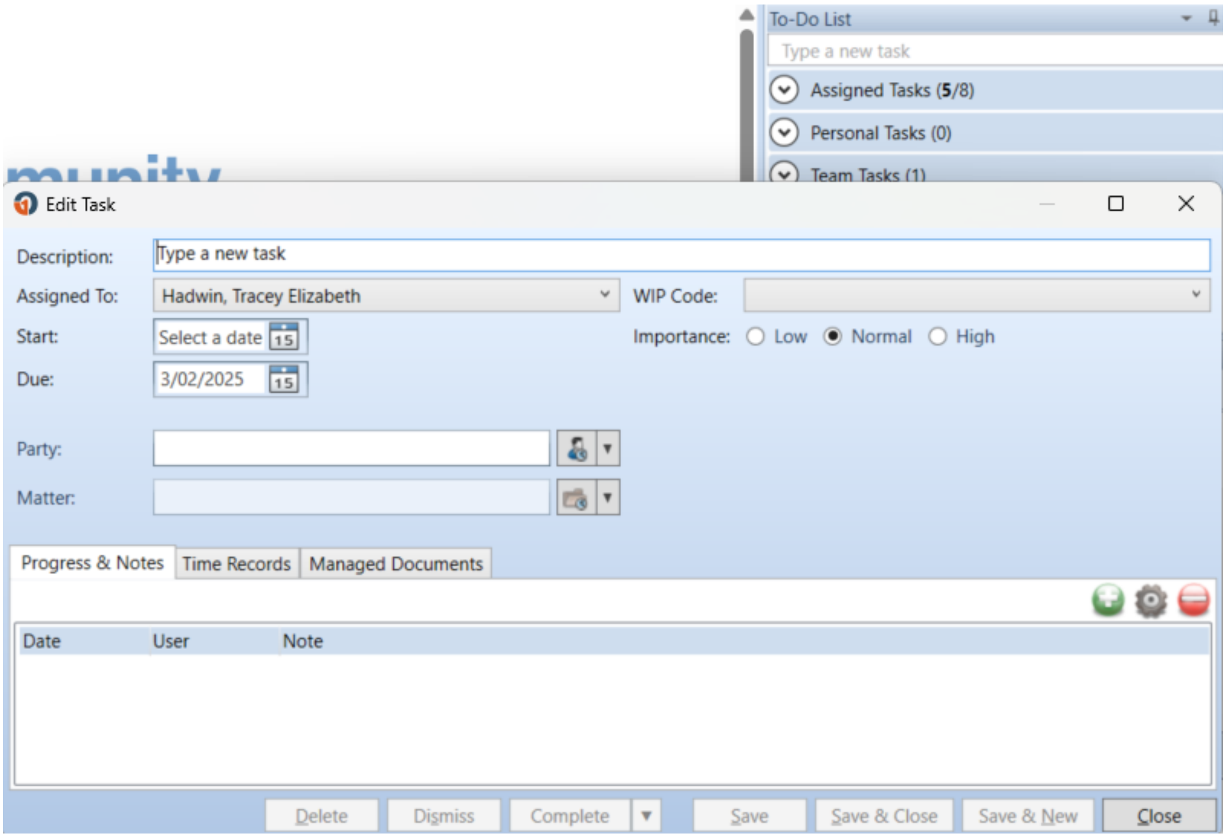

Figure 4.

<u>Creating a task from Time Recording</u>

A task can be created when saving a time record. Click ‘Save + Task,’ the time record will be saved to the matter and the Edit Task screen will be displayed (see Figure 5 below).

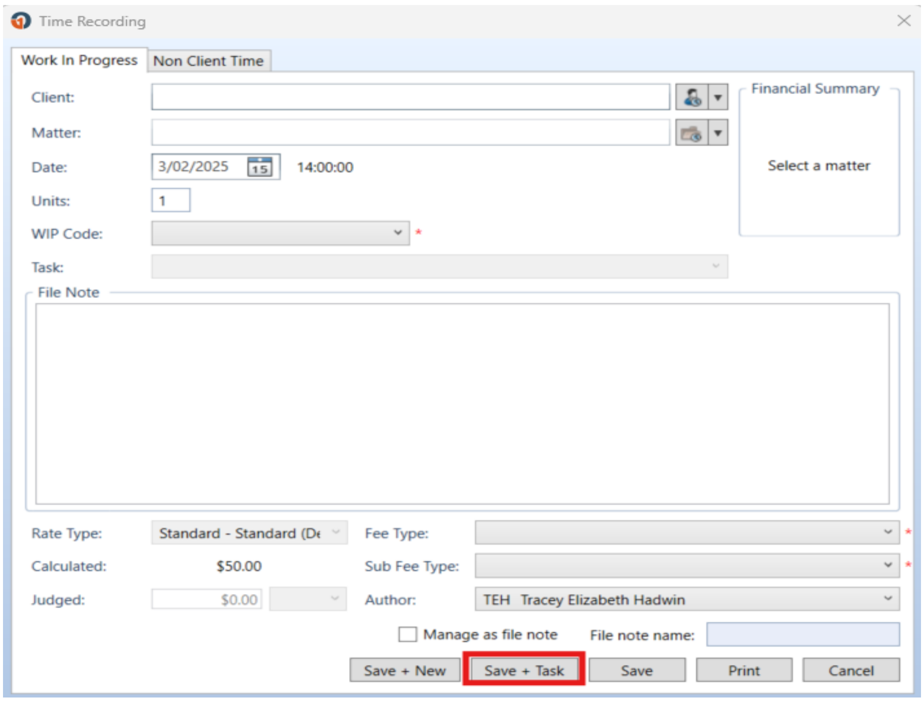

Figure 5.

Information to Include on a Task

Along with setting the basic text for the task, the following can also be added:

+ Start date
+ Due date
+ The importance of the task
+ Who the task is assigned to

Over time, as work progresses on a task, notes can be loaded in. It is useful to give the supervising author an accurate picture of where the task is at. Some progress notes are automatically added, such as a note for when the task was created, assigned, marked as completed etc.

<u>Time records can be attached to a task</u>

When completing a time record, if there are any incomplete tasks on the matter the time record can be assigned to the task. This helps others keep up to date on where the task is at.

<u>Managed documents</u>

Managed documents can be attached to a task, which is useful if the task is to draft a document. The drafted document (once managed) can be attached to the task and the task can be assigned to the matter author to be reviewed.

<u>Assign the task to someone else</u>

Tasks can be bumped to another staff member at any time. This is a useful workflow tool to keep a task moving on to completion if other team members are required to complete various aspects of the task at certain times.

Editing a Task

Depending on system permissions and who created the task, tasks can be Deleted, Dismissed or flagged as Complete.

When flagging a task as Complete there are three options:

+ Flag the task as complete and take no further action
+ Flag the task as complete and create a time record. Using this option, the task description will copy to the time record narration/file note and the client and matter will be populated. This means all the user needs to do to complete the time record is to pick a WIP code and set the appropriate number of time units
+ Flag the task as complete and create a new task to complete the next step in the matter

Once a Personal Task is created it cannot be changed to a client/matter task.

My “To-Do List” Key

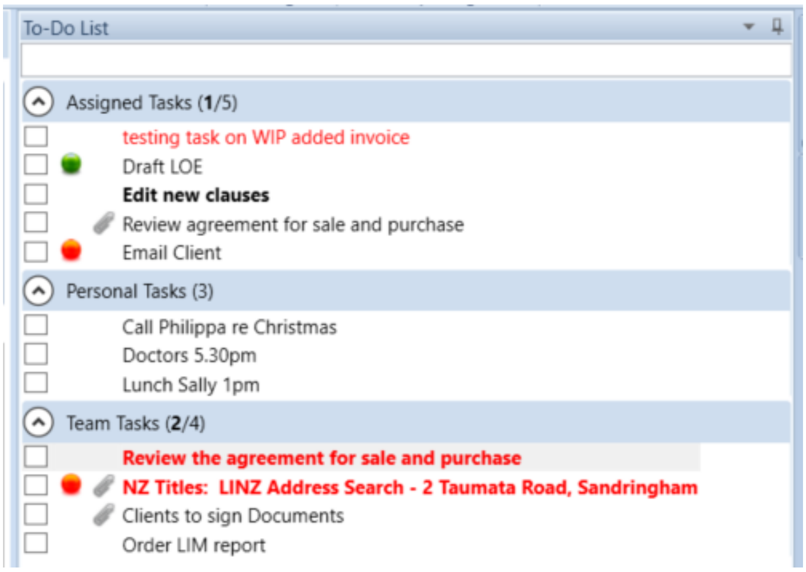

Figure 6.

- Paper clip – has attachment/s
- Red type – overdue

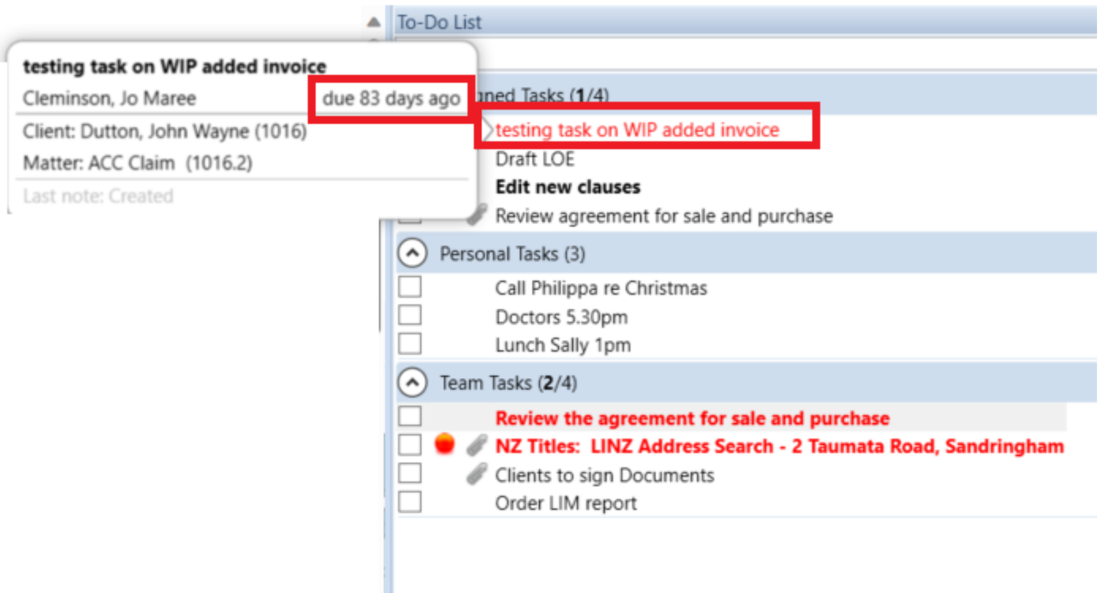

Figure 7.

- **Bold** type - unread

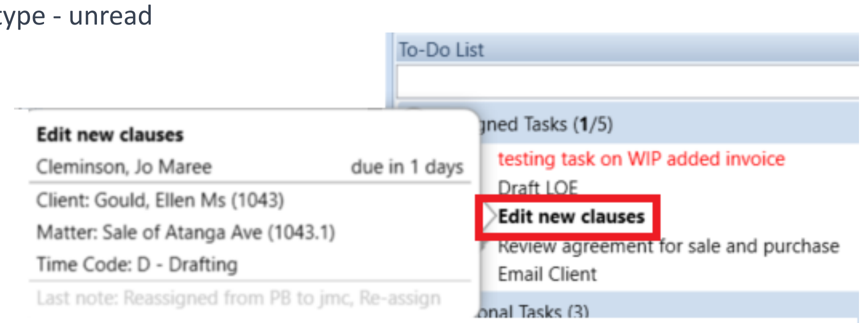

Figure 8.

+ Green dot – low importance

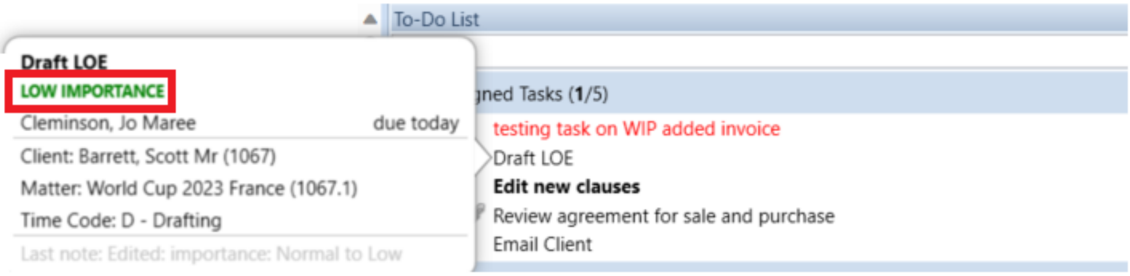

Figure 9.

+ Red dot – high importance

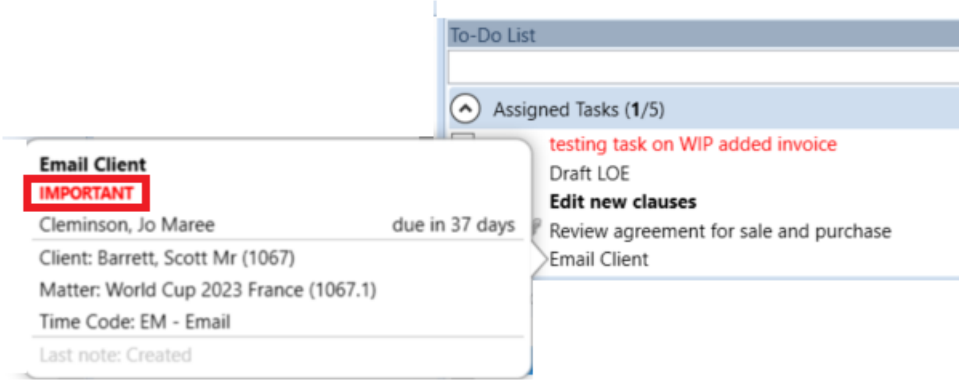

Figure 10.

Task Dashboard

The Task Dashboard is a powerful tool for managing and reviewing tasks (see Figure 11 below). Tasks can be filtered by:

+ Person – who is responsible for the task, or who is the client author (show tasks for clients managed by a specific author), or who is the matter author (show tasks for matters managed by a specific author)
+ Task status
+ Client, or client and matter
+ Task description – the ability to search for words in the task description can be useful for finding tasks of a certain type, e.g. all overdue tasks that include the text 'engagement letter'

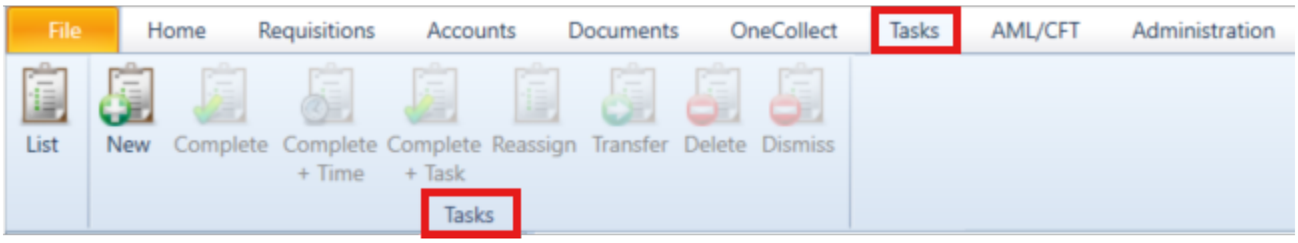

Figure 11.

Reassign & Transfer Tasks (singly or in bulk)

Users with administrative privileges can use the task tab to administer tasks in bulk. This is useful when a staff member is going on leave for an extended period. All incomplete tasks assigned to the person going on leave that are due within the leave period could be selected and reassigned to others (See Figure 14 below).

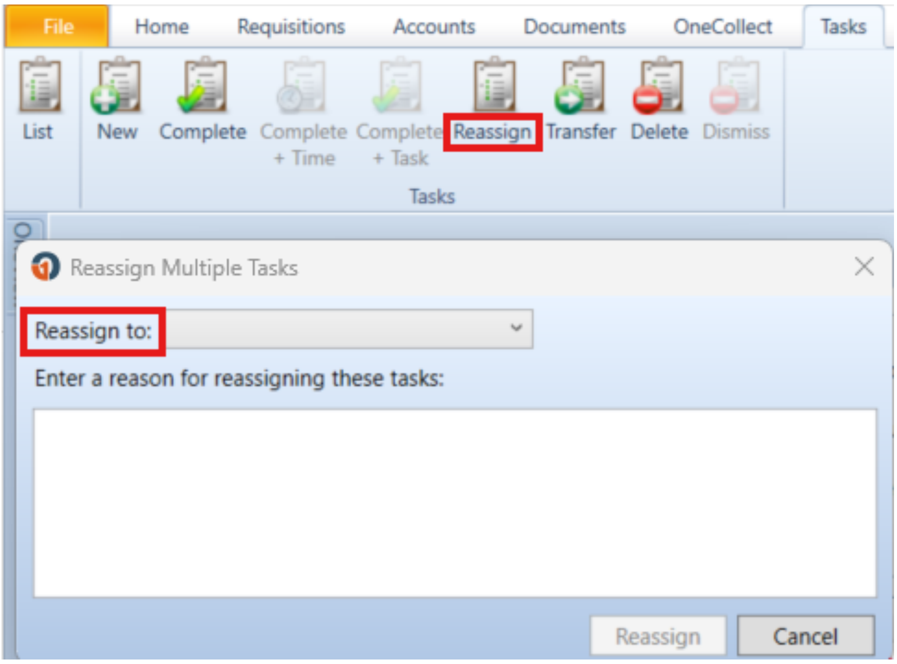

Figure 14.

A matter level task can be transferred to a client and matter, either singly or in bulk (see Figure 15 below).

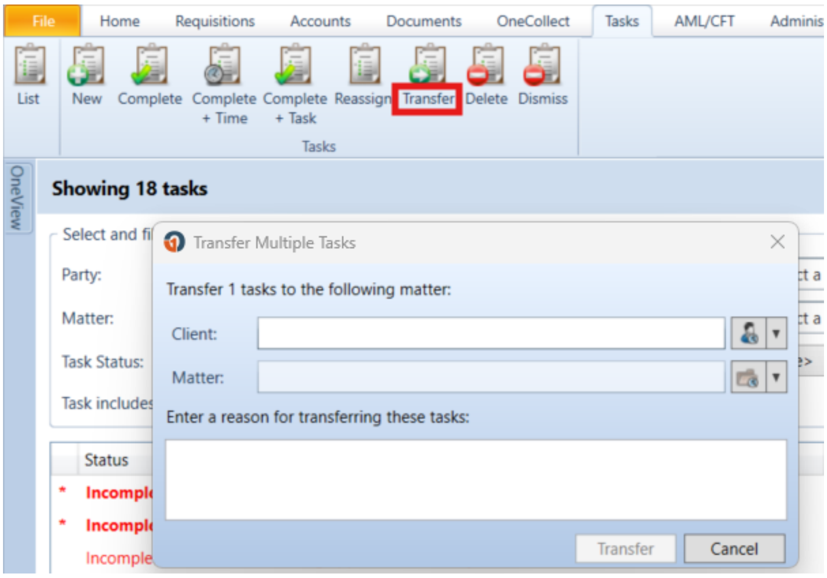

Figure 15.

"Owner" & "Task Status" Options

When viewing tasks, be aware of the terminology used and the filter options available.

<u>"Owner" options (see Figure 16 below)</u>

+ Me – this is the default - to view just the tasks that I have as Task Owner. This can be further filtered to just tasks I have as Client Author or Matter Author
+ All – to show all tasks for all users as either Task Owner, Client Author or Matter Author
+ Person – choose one or more other users as either Task Owner, Client Author or Matter Author

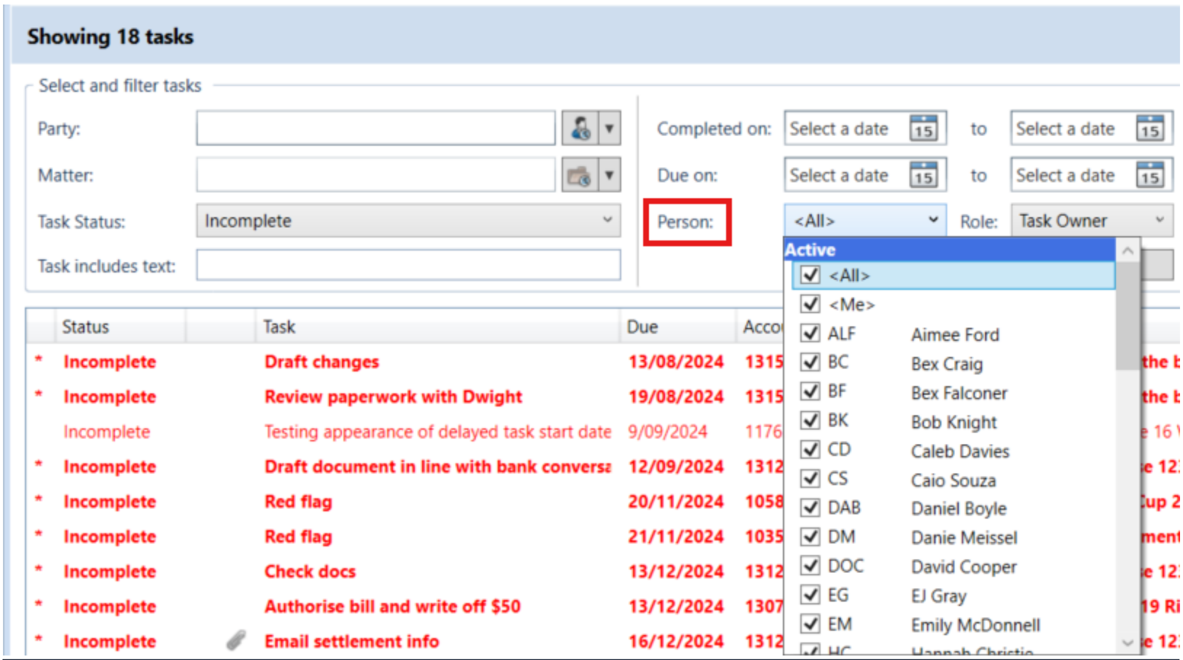

Figure 16.

"Task Status" options (see Figures 17 & 18 below)

+ Incomplete – this is the default
+ Overdue
+ All (regardless of due date, completed etc)
+ Completed
+ Dismissed

Figure 17.

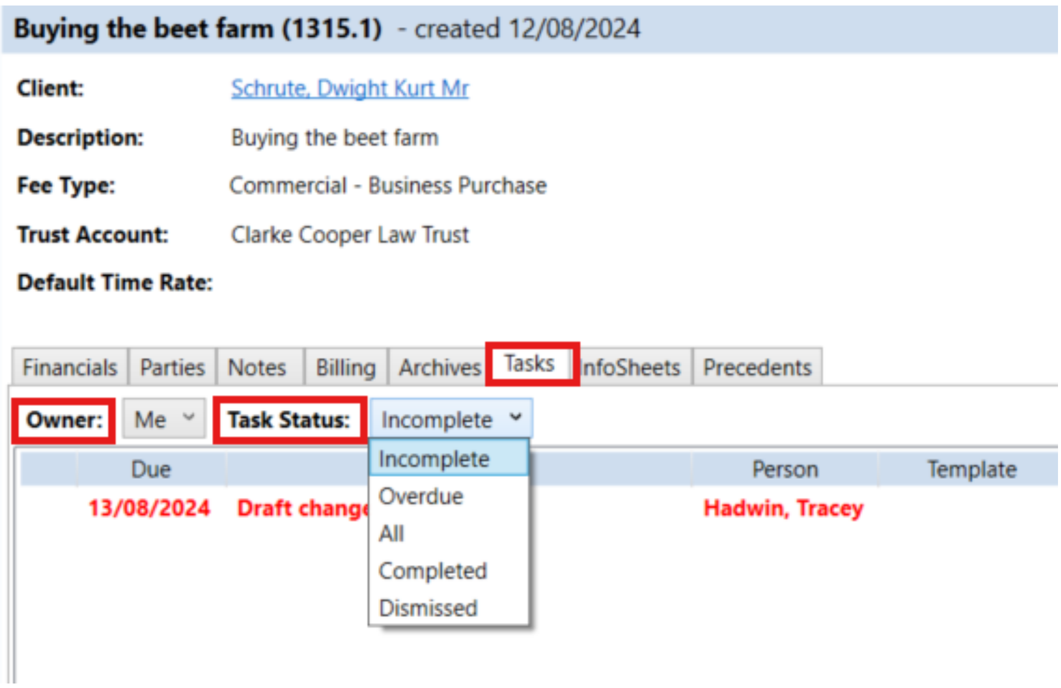

Figure 18.

Resizing and Moving the To-Do List

Users can set up their To-Do List (and Time Recording or OneView) screens to suit themselves.

The To-Do List can be dragged longer, made wider or relocated on the screen. It can be relocated (via a Drag & Pin) to sit on the left or right of the time recording screen or over on the left by the OneView screen (see Figures 19 & 20 below).

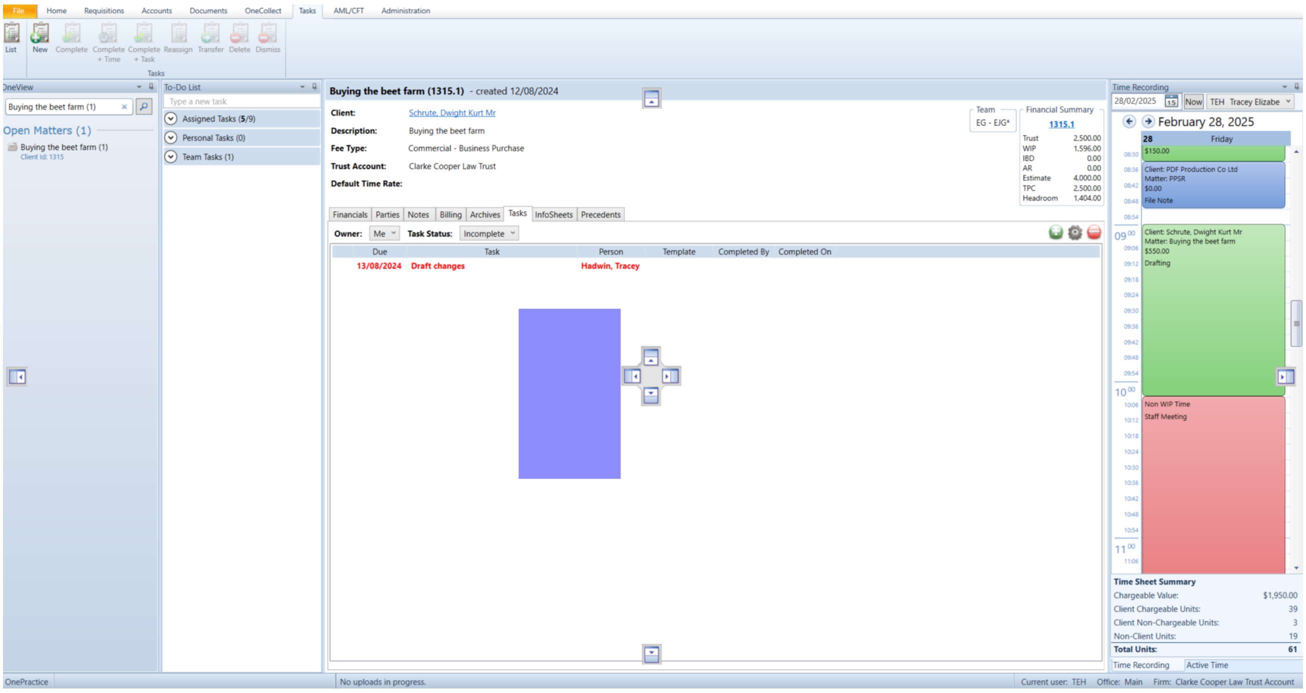

Figure 19.

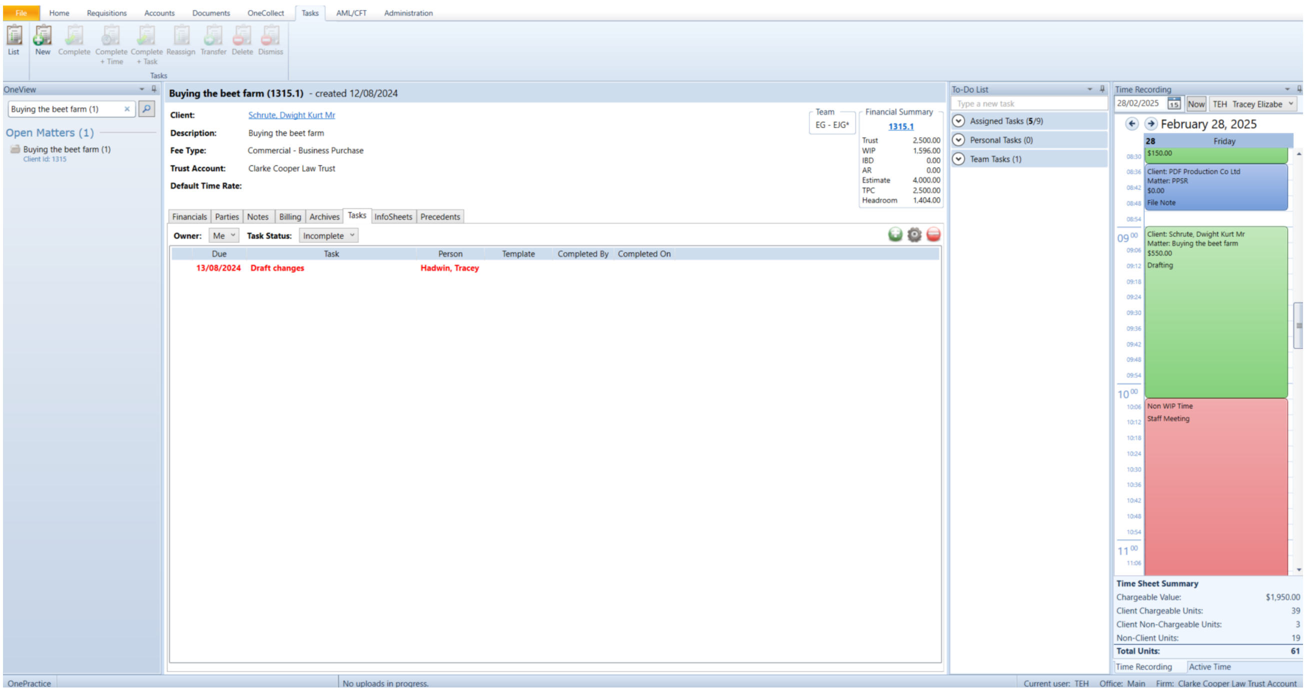

Figure 20.

Task Permissions

All users can use Tasks and the To-Do List.

There is one permission that can be given to users to allow them to administer all tasks (see Figure 21 below).

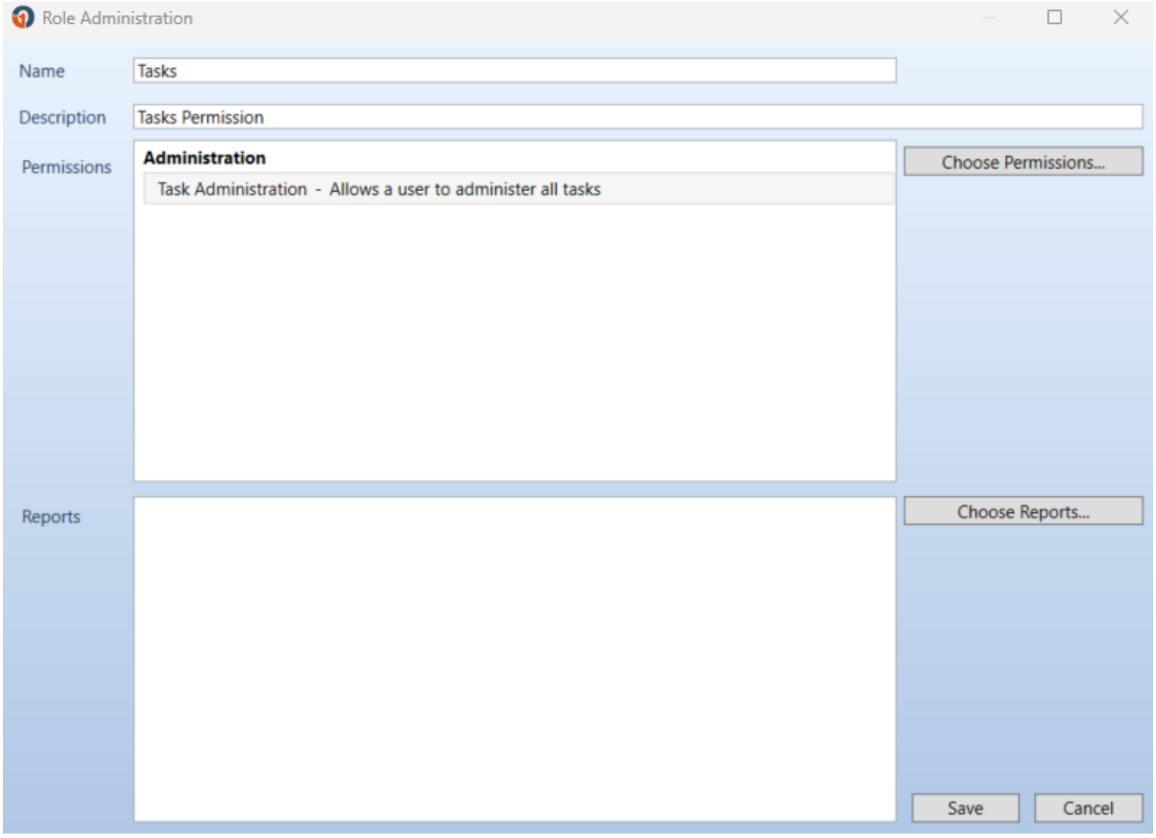

Figure 21.