



ACL5

TASK MANAGER COMPLETE GUIDE

The Task Manager allows users to keep track of their file tasks and reminders within ACL. All ACL users have access to all tasks created for all files, subject to any ethical walls or security features which the firm might have in place.

All Files Page - Next Task and Status Columns

Next Task	Status
2023-09-19	
2024-04-15	
2024-04-15	
2024-04-19	
2024-04-19	

On the main page, ACL will display the **Next Task** date and **Status** of the upcoming task for all files where tasks are assigned.

The **Status** icons have a colour code which lets users quickly see a breakdown of tasks:

- Deadline Task and overdue
- Deadline Task and due today
- Deadline Task due in the next X* days
- Scheduled Deadline Task due more than X* days
- Regular Task and overdue
- Regular Task and due today
- Regular Task due in the next X* days

* The default ACL value is 7 days. The ACL Administrator may adjust this to any number of days as required by the firm.



For assistance contact:

ACL Support

416.363.1650 x100 / 1.800.340.3234 x100

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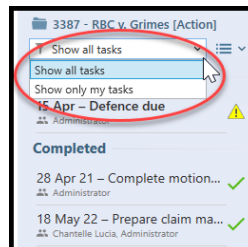
Task Pane Overview – My Tasks

The **My Tasks** bar shows information at glance pertaining to a user's tasks and the status of same.

- 1** This list of tasks displayed within **My Tasks** shows all tasks for all files assigned to a user with the X date range.
- 2** The **Calendar** displays task due dates in bold.
- 3** **Today** lists any overdue or due today tasks.
- 4** **Next 7* Days** list the tasks due within the next seven days. *X value configured by the firm
- 5** **Completed** will list the tasks that have been marked as complete. **Note** this is a setting that can be configured not to display completed tasks.

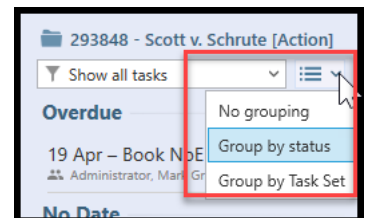
Task Pane Overview – File Tasks

File Tasks will show the same details as **My Tasks** however the list of tasks displayed are **all tasks for all users**. There are other features available within **File Tasks** as well.



Click the dropdown menu to display all file tasks or only my tasks.

Click the dropdown menu to display the grouping options for tasks and task sets. If there are multiple task sets assigned to a file, it may be helpful to see which tasks belong to which task set.



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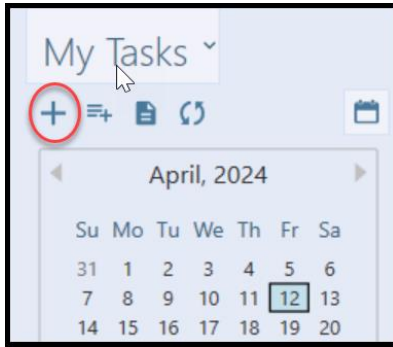
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Adding a Task



From the task pane, click on the **Add Task** icon.

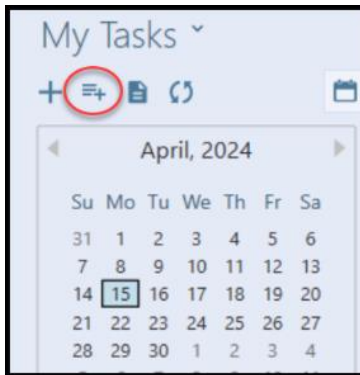
A screenshot of the 'Add Task' dialog box. The dialog has a title bar 'Add Task' and a close button. It is divided into several sections: 'Task Details', 'Synchronize as', 'Outlook remind', 'E-mail reminders', 'Assigned to', 'Notes', 'Completed', and 'Status'. Each section contains input fields and options. Red numbered callouts (1-12) point to specific elements: 1 points to the 'File' field containing 'xd test 99887 - Grimes v. Dixon [Action]'; 2 points to the 'Task' field; 3 points to the 'Due date' field with a calendar icon; 4 points to a calculator icon; 5 points to a 'Deadline' checkbox; 6 points to the 'Synchronize as' radio buttons for 'Outlook Task' and 'Calendar Appointment'; 7 points to the 'Outlook remind' field with a calendar icon; 8 points to the 'E-mail reminders' field; 9 points to the 'Assigned to' dropdown menu showing 'Administrator Chantelle Lucia'; 10 points to the 'Notes' text area; 11 points to the 'Completed' checkbox; and 12 points to the 'Add Another' button at the bottom right.

- 1 The **File Name** will automatically fill in.
- 2 Enter the **Task**.
- 3 Click the calendar to select the **Due Date**.
- 4 If the due date needs to be calculated, click the calculator icon to have ACL automatically calculate the due date (for example, you can enter in a date, and ask ACL to calculate the due date two years from today's date).
- 5 Select if the task is a **Deadline** task.
- 6 Choose whether to synchronize this task as an Outlook appointment or an Outlook task.
- 7 Add in the **Outlook reminder** date or dates.
- 8 Add in any **E-mail reminder** date or dates.
- 9 The **Assigned to** will automatically assign the user who is creating the task. Click **Assign to** to add additional firm members or groups.
- 10 Add in any **Notes** specific to the task.
- 11 Check **Completed** if required.
- 12 Click **Add Another** to add another task. Click **OK** if no additional tasks are needed.

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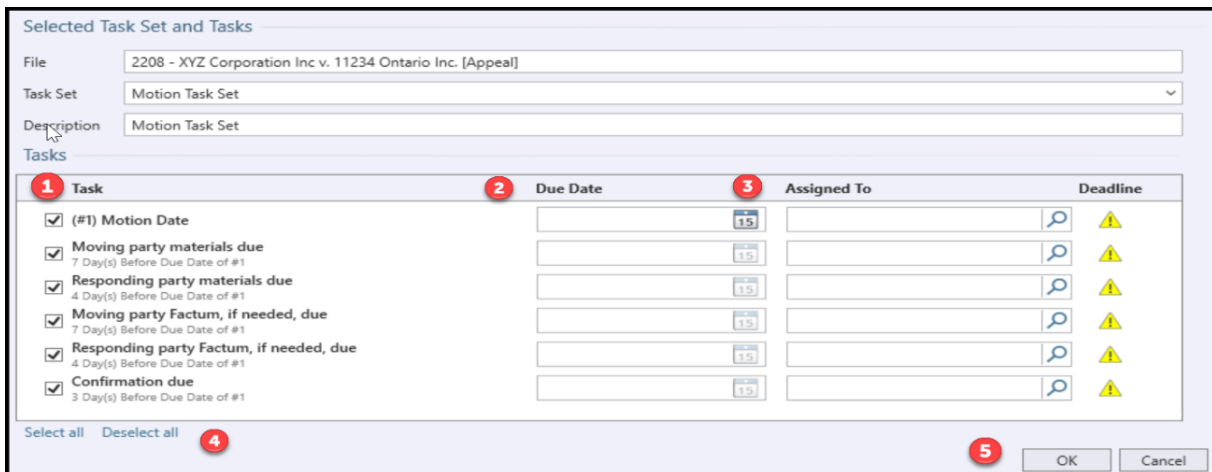
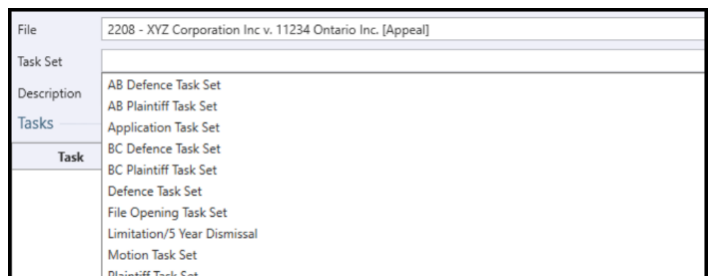
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Adding a Task Set



From the Task Pane, click the **Add Task Set** icon.

A list of available **Task Sets** that the firm's ACL Administrator has added will be available.



- 1 Review the list of tasks contain within to selected Task Set.
- 2 Enter in the **Due Date**.
- 3 Enter in the firm members or groups this task will be **Assigned To**.
- 4 The Task Sets will automatically have all tasks contained selected. You can choose to deselect any Task within the set.
- 5 Click **OK** to add the Task Set to your file.

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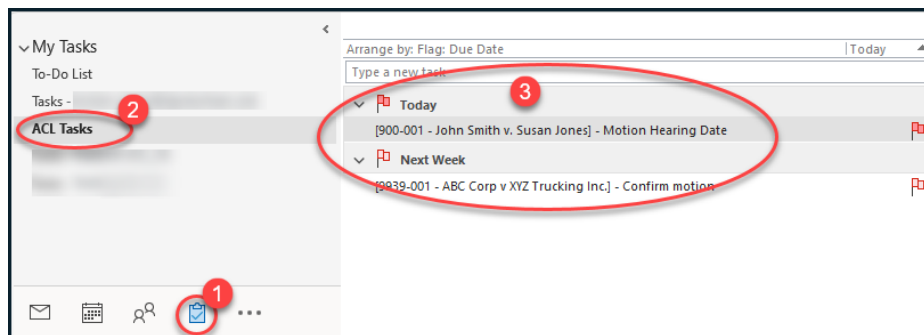
Synchronizing Tasks with Outlook

ACL can sync tasks entered to the program with Outlook. ACL Tasks can appear in the Tasks section or Calendar section of Outlook. **Note:** synchronized ACL tasks will appear in their own instance called ACL Tasks or ACL Calendar.

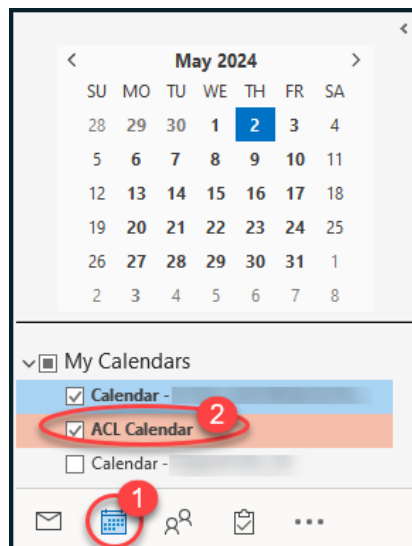
If the firm has enabled the ACL Task Manager synchronization with Outlook, any task added into ACL will automatically appear in Outlook. **Note:** if adding lawyers to tasks (or other firm members who do not regularly use ACL) the firm members will need to launch ACL on their machines one time only to have the task synchronization take effect.

Outlook & ACL Tasks

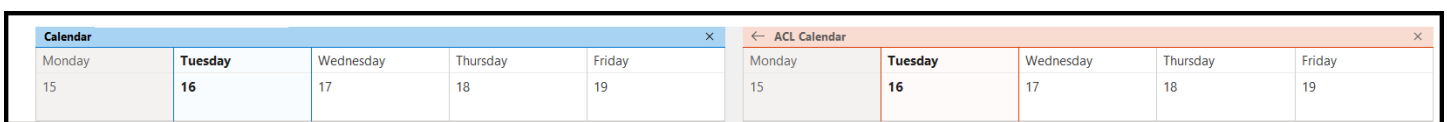
When accessing the synchronized ACL tasks in Outlook you will see a separate subfolder titled **ACL Tasks**. Click the folder to view synched ACL tasks:



For the calendar appointments, under **My Calendars**, there is an option for **ACL Calendar**:



Ensure the option is checked and your calendars will appear:



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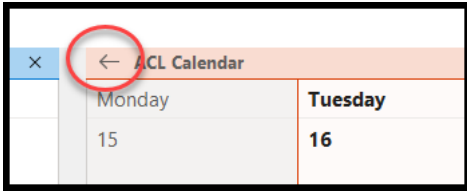
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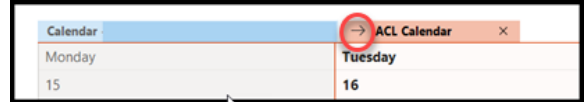
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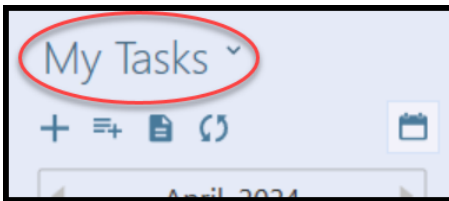
You can easily overlay the calendars by clicking the right arrow next to the ACL calendar

The calendars can be separated again by clicking the left arrow.



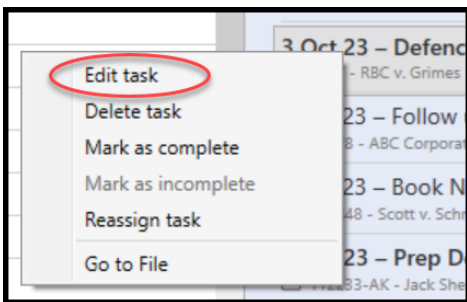
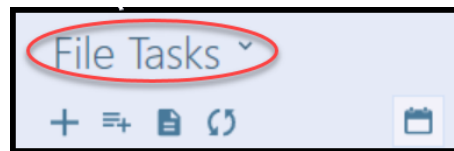
Note: All edits to tasks or task sets must be done in ACL. The synchronization is one-way from ACL to Outlook; Outlook does not sync back to ACL. Should edits be made to any of the ACL tasks within Outlook, the changes will not carry over to ACL.

Editing a Task



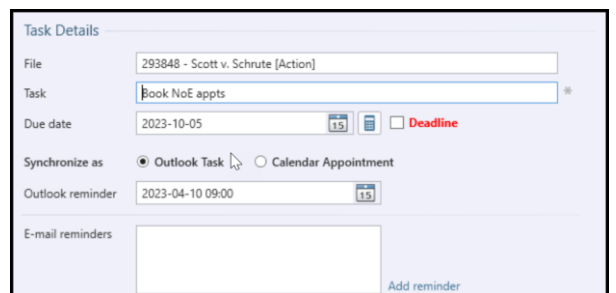
If the status of the task is **Overdue**, **Due Today** or due within the **Next 7 Days**, ensure that your task pane is set to **My Tasks**.

If the status of the task falls outside of the above time range, ensure that your task pane is set to **File Tasks**.



Right click on the task and click **Edit Task**.

Make the required changes and click **OK** when done.



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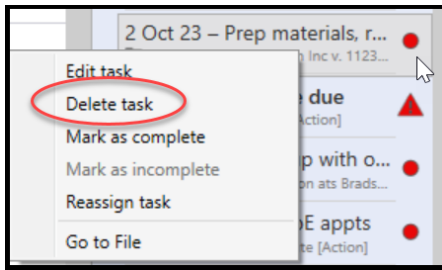
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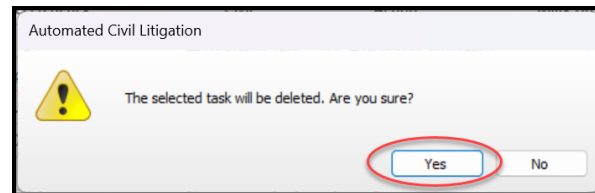
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Deleting a Task

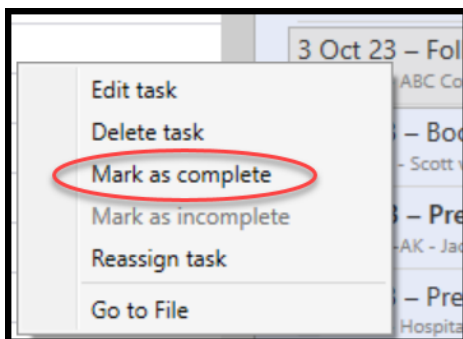


Locate the task to be deleted (follow the steps for **Editing a Task**). Right click on the task and select **Delete Task**.

Click **Yes** to confirm.

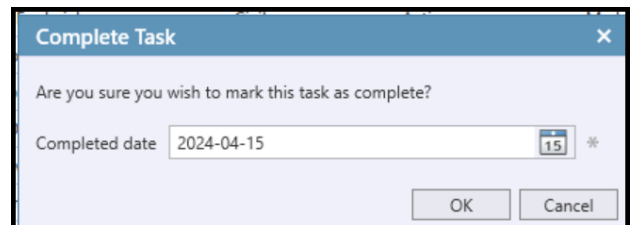


Completing a Task

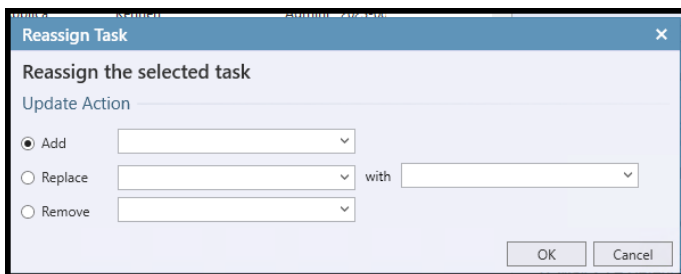


Locate the task to be completed (follow the steps for **Editing a Task**). Right click on the task and click **Mark as Complete**.

The **Completed date** will default to the current date. Click on the calendar icon to select a different date. Click **OK** when done.



Reassigning Tasks



Tasks can be reassigned one by one, or file by file. To reassign a task located with the **My Tasks** pane, right click on the task, and select **Reassign Task**. Choose the required option and click **OK**.

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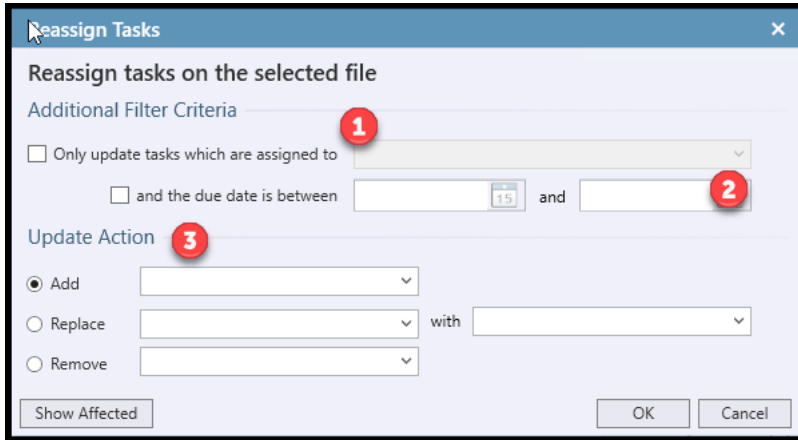
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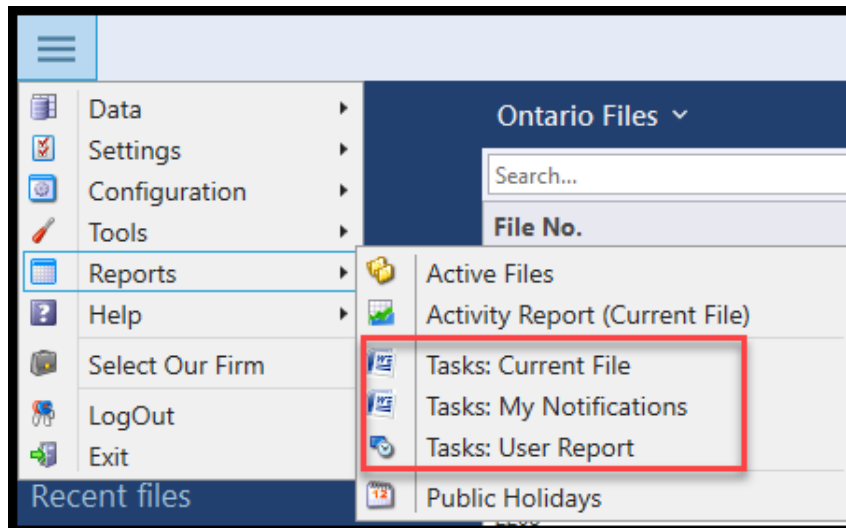
To reassign tasks for an entire file, highlight the file from the all files page, right click and select **Reassign Tasks**.



- 1 Choose whether the updated tasks are for only a certain firm member.
- 2 Choose if the reassigned tasks are only for a specific date range.
- 3 Choose which option is needed to **Add**, **Replace** or **Remove**.

Task Manager Reports

In addition to the e-mail reminders that can be configured for ACL tasks, there are task manager reports users can generate under the **Menu → Reports**.



Tasks: Current File

This report will generate into a Word document containing all tasks for all users for the selected file.

Tasks: My Notifications

This report is similar to the daily e-mail reminder report which lists **Overdue Tasks**, **Tasks Due Today**, **Tasks Due in the next 7 days** (or whichever default has been configured by the firm), **Reminders** and **Notifications**.

Tasks: User Report

This report will list all task information for all ACL users, as of the date selected. The report can be filtered by user and grouped by different variables as required. The report can be printed directly from ACL or exported to Excel. When exported to Excel, the report is automatically formatted as a table with additional filtering available.

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