Task Sets are a group of tasks which can be assigned at one time to a file, instead of adding multiple tasks one by one. Task Sets can be configured to only be available for certain Practice Areas. Task Sets can also be categorized to assigned certain tasks to certain groups.

Creating Task Sets
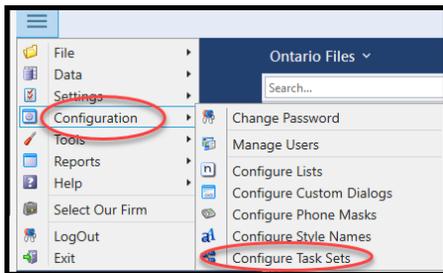
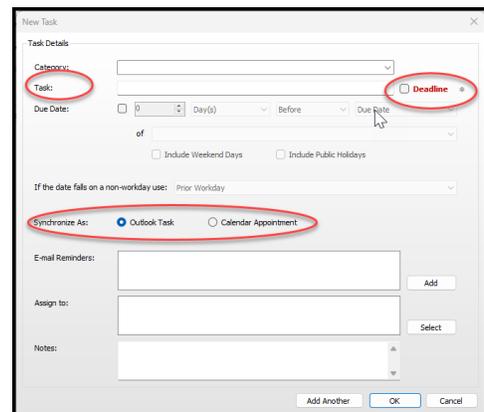To create a Task Set, click **Menu → Configuration → Configure Task Sets**.

Click **Add Task Set**.
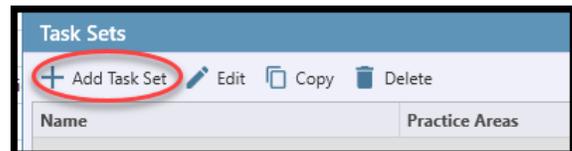
Type the **Name** of the Task set and click **Add** to begin adding the tasks.

Configure the first **Task** for the set. Choose whether this is a **Deadline** task. Choose if it should synchronize to **Outlook** as a **Task** or **Calendar** appointment. Configure the E-mail Reminders (if required), how the task should be assigned, and add any Notes, if required (see below for details).

NOTE: The first task cannot be connected to anything; it is the anchor for the rest of the tasks in the set.

Once the initial task has been added, the subsequent tasks can be added to the Task Set:

① Enter the name of the task and select whether the task is a **Deadline**.

② The **Due Date** can be set to auto calculate by selecting how many days/weeks/months/years in connection to either the **Due Date** or the **Completed Date** of another task within the set.

NOTE: Skip this step when configuring the first task in a new task set. The first task cannot be connected to anything; it is the anchor for the rest of the tasks in the set.

③ Choose whether the date calculation should include weekends or holidays.

④ If the **Due Date** falls on a non workday, choose which date to receive the email reminder.

⑤ Choose whether the task should synchronize with the **Outlook Tasks** or **Outlook Calendar (Appointment)**.

⑥ Configure the **Email Reminders**. Note multiple email reminders can be set (ex. one year, six months, one month).

⑦ The tasks should be set to be **Assigned to** individuals or group members on the file (ex. Task Set Creator, Primary Lawyer, Legal Assistants, etc.).

⑧ Enter any **Notes** relevant to the task.

⑨ Click **Add Another/OK/Cancel**.

For assistance contact:
ACL Support
416.363.1650 x100 / 1.800.340.3234 x100
supportacl@dyedurham.com

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Practice Areas

Task Sets can be configured to appear for files only within a certain **Practice Area. Practice Areas** are selected on the **File Details** page of an ACL matter.
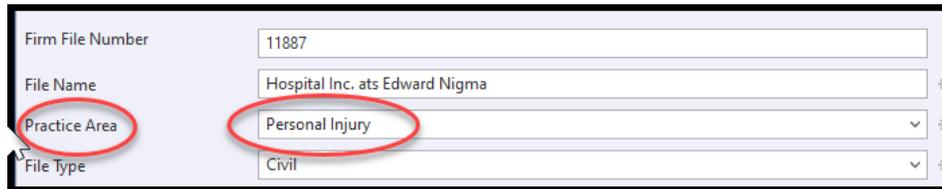
When creating the Task Set, the default **Practice Area** will be set to **All**, meaning the task set will be for all files within ACL. To configure the Task Set to only be available on files within a certain **Practice Area**, click **Specify**.
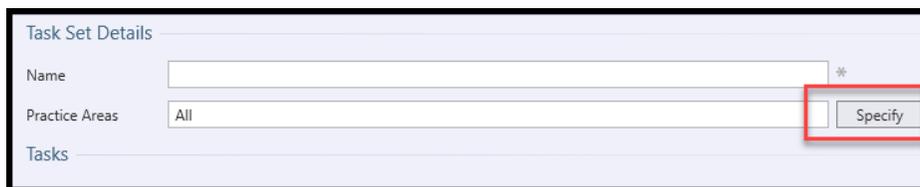
Click **Specified Practice areas** and select the **Practice Areas** the Task Set should be available for.

Categories and Subcategories

Categories and subcategories can be created to organize a Task Set to define tasks for certain groups. For example, some tasks can be assigned to the Legal Assistants, and some tasks can be assigned to the Law Clerks.

When adding tasks to a Task Set, within the **Category** field, manually enter the first group. For example, Intake Group. Add all tasks required for the group. Once all tasks have been entered, before entering in the set of tasks for the next group, ensure that the **Category** field has been entered. Note, any wording entered to the **Category** field will be available for selection going forward.

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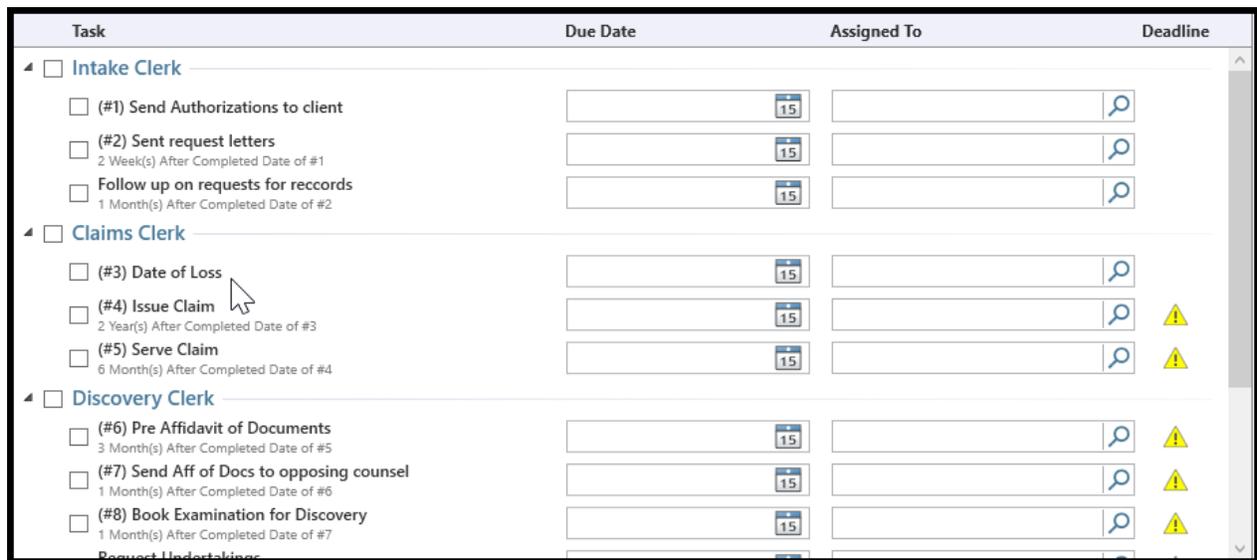supportacl@dyedurham.com

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Once all groups and tasks have been configured for the Task Set everything will appear organized as required:
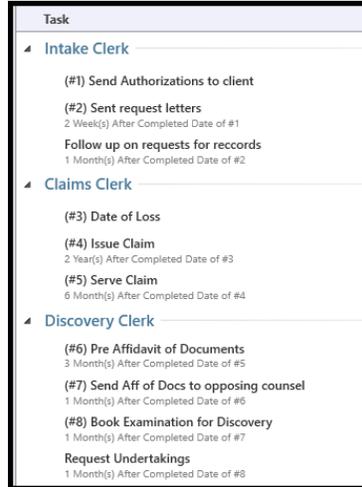
When users add the Task Set to a file, they can choose to select tasks by group and/or by the individual tasks.