



Task Management

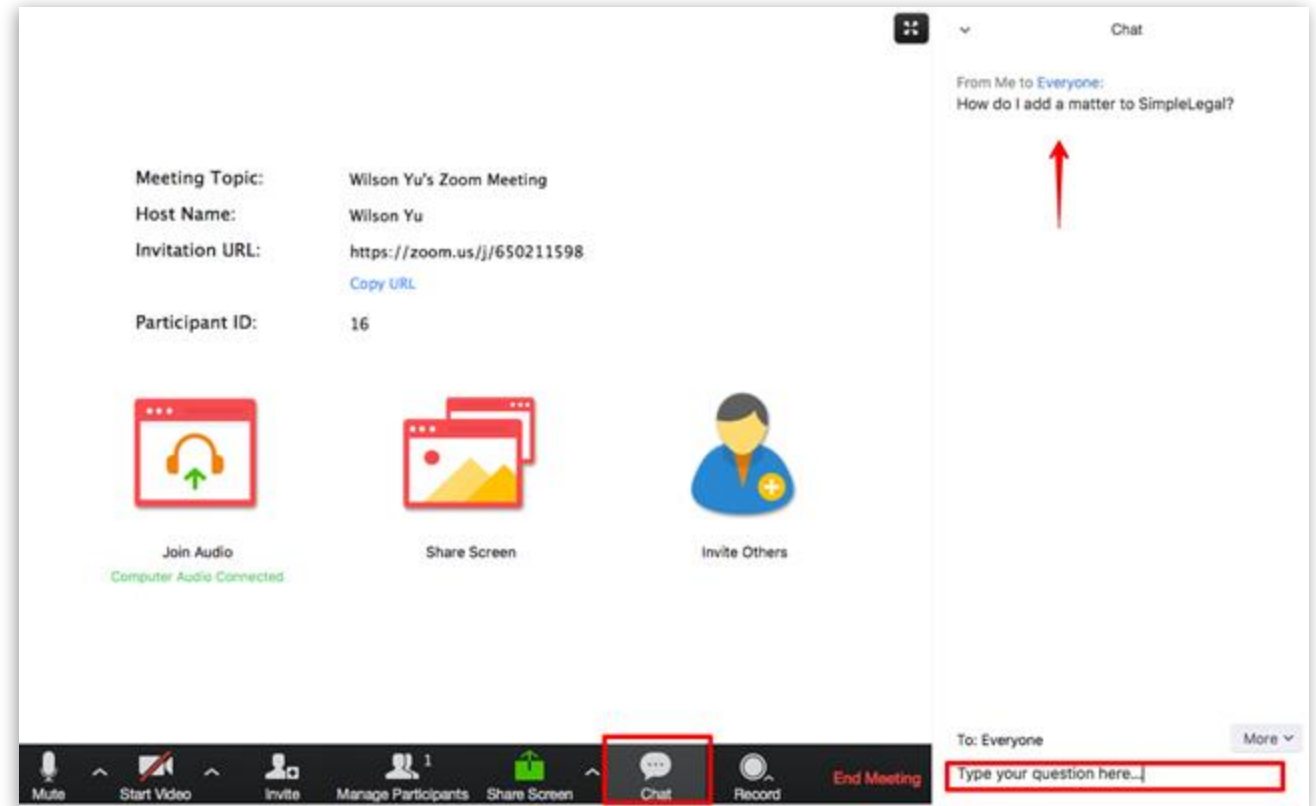
Hi, I'm Kinda! 🙋

- Customer Education Manager
- Based in Houston, TX



How to participate

- Your audio is muted
- Use the Q&A function to ask questions
- Training is recorded and a link will be sent to you along with the slides





By the end of this training, you'll be able to:

- **Understand** how tasks can help you better manage your work with matters
- **Create and assign** tasks for your matters
- **View and edit** existing tasks
- **Adjust** task settings such as task statuses, types and templates (administrators)

Learning Goals

Reflect

How are you currently managing and tracking work and matter related tasks?

Share your thoughts in the chat!



Why Task Management

As a legal team member, you may be facing various challenges:

- Struggle to prioritize different tasks and manage overflowing lists of things to do, keeping track of what needs to be done first.
- Failing to prioritize tasks leads to missed deadlines, unhappy clients and potentially legal implications.

The screenshot shows a web application interface for managing legal tasks. At the top, the case name 'Schmuck V. United States' is displayed with a green 'OPEN' status tag. A navigation bar includes links for Overview, Budgets, Files, Invoices, Tasks (which is the active tab), Related Matters, Updates, Vendors, and Settings. An 'Actions' dropdown menu is located in the top right corner.

Below the navigation bar, the 'Tasks' section is titled with a 'List' view icon. There are 'Download' and 'Add' buttons. A filter bar shows 23 tasks in total, with filters for 'All' (23), 'My Tasks' (11), 'My Requests' (4), and 'Following' (5). Below this is a filter bar with buttons for Task Name, Assignee, Status, Due Date, Priority, Type, Comments, Files, Created By, and Created Date, along with a 'Reset' button.

The task list shows 1 to 10 of 23 entries. The view is set to 10 items per page. A search bar is present with the placeholder text 'Start typing to search'.

<input type="checkbox"/>	Task Name	Assignee	Status	Due	Priority	Task Type	Comments	Files	Actions
<input type="checkbox"/>	Conduct legal research on antitrust laws, regulations, and case law cases	SP	In Progress	Apr 06	Medium	Fact gathering	3	3	...
<input type="checkbox"/>	Conduct legal research on antitrust laws, regulation... ↳ Research antitrust laws	JM	In Review	Apr 03	Medium	Fact gathering	1	1	...
<input type="checkbox"/>	Conduct legal research on antitrust laws, regulation... ↳ Research regulations	OB	Complete	May 31	Low	Fact gathering	1	1	...
<input type="checkbox"/>	Advise clients on compliance with antitrust laws and regulations	JM OB	Complete	Apr 14	Low	Legal advice/guidance	----	----	...

Benefits of Task Management

Task management allows you to:

- **Track deadlines:** Ensure that important to-do's get done on time (i.e. filing deadlines).
- **Ensure appropriate coverage:** So that work continues when a team member is unavailable (i.e. goes on vacation).
- **Share progress:** Report progress to relevant stakeholders to keep them aware and informed, building accountability and motivation.
- **Evaluate success:** Get a complete picture of what happened, if it was successful, cycle times from assignment to completion, age of tasks, time period, and the people involved.

Conduct legal research on antitrust laws, regulations, and case law cases

Created Apr 13, 2023 • Created by Shri Admin

SP

ASSIGNEE(S)
Shri PowerUser

📅

DUE DATE
Apr 06

👁

FOLLOWER(S)
DF JM SA +1

✓

COMPLETE

Description

Legal research that involves looking into case law, prevalent regulations and antitrust laws.

Overview

2 Subtasks

3 Files

3 Comments

History

Priority

Medium

Related To

Schmuck V. United States

Status

In Progress

Type

Fact gathering

Private

☒ Restrict visibility to task assignees and followers only




OB

Add a comment

Comment

Permissions in Task Management

Permissions for tasks follow matter-level permissions in your environment.

-  **Edit:** If a user has permission to edit a matter, they also have permission to view, create, edit, and delete tasks within that matter.
-  **View-only:** Users with view-only access to a matter can access tasks, but they do not have options to create, edit, or delete tasks or any associated data.
-  **Private:** If one or more individual tasks have sensitive information that requires further restriction, there is a privacy setting that can be enabled so that only assignees and followers have access.

Private



Restrict visibility to task assignees and followers only

Demo

Best practices

- We recommend determining which users will be creating and assigning tasks to avoid duplicating work, confusing assignees, and/or creating clutter.
- If only assignees and followers should have access to some or all tasks in a matter, make sure to enable the "private" toggle to restrict visibility. Admins with access to the matter, however, will still be able to see, open, and modify private tasks.
- Make sure that *at least one assignee* is added to a task to avoid incomplete or missing work.
- If a task has multiple parts, consider adding/assigning subtasks for better organization.
- Prior to adding and assigning tasks, make sure that the priority labels, statuses, and task types have been reviewed by an admin in your environment.

Task Email Notifications

To help users keep track of priorities and items that require attention, SimpleLegal sends automated task notifications to assignees as follows:

- **Daily Reminder Email:** Displays any overdue tasks and any upcoming tasks to which you are assigned across matters. Email is sent daily at 9pm PST.
- **Task Assignment Notification:** Shows an overview of the new task to which you have been assigned.

Followers receive automated task notifications as follows:

- **Daily Updates Email:** Displays any tasks across matters that have been updated (e.g., new comments, changes to due dates, assignee updates, etc.). Email is sent daily at 9pm PST.
 - **Task Follower Notification:** Shows an overview of the new task to which you have been added as a follower.
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Session outline

Topic		Details
1	Introduction	Overview of Task Management and benefits
2	Tasks list page	<ul style="list-style-type: none">• How to view tasks and subtasks• How to sort, filter and search tasks• How to download tasks
3	Create a new task	<ul style="list-style-type: none">• Create task vs. task from template• Assign a task and add a due date• Add followers• Task attributes• Add subtasks• Attach files• Complete a task
4	Edit an existing task	<ul style="list-style-type: none">• Edit task attributes• Add/remove attachments• Add/edit/delete comments• Private tasks• Edit subtasks
5	Manage tasks	<ul style="list-style-type: none">• Bulk manage tasks• Copy a task or subtask• Delete or bulk delete tasks• View activity log
6	Adjust task settings (admins)	<ul style="list-style-type: none">• Customize priorities and statuses• Add or remove task types• Create task templates

How to activate Task Management

- To get started with Task Management, you'll need to *opt-in* to have it turned on in your SimpleLegal instance.
- Please complete this [Activation Request Form](#) to kickstart the process.
- Once your request is received and addressed, our Customer Success Team will contact you via email.
- As a SimpleLegal subscriber, you'll enjoy task management at no additional cost until your next renewal. Please check with your account manager for further details.

SimpleLegal Task Management Activation Request Form

Thank you for your interest in activating SimpleLegal's task management! Our Customer Success team will address your request in the order it was received, and will contact you via email you provide below.

As a SimpleLegal e-Billing subscriber, you'll enjoy task management at no additional cost until your next renewal. But hold on tight because we're cooking up brand new matter management offerings that task management will become a part of, and may include an additional cost at your next renewal if you want to continue use. Stay tuned!

* Indicates required question

First and Last Name *

Your answer

Work Email Address *

Your answer

Company Name *

Additional Resources

- Check out the [Task Management Success Kit](#)
 - Access the SimpleLegal **help center** for articles on how to use Task Management (make sure to be logged in)
 - Articles for [Administrators](#)
 - Articles for [Users](#)
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Questions?

Reflect

Can you name 1 thing you learned today that you found particularly useful?

Share your thoughts in the chat

