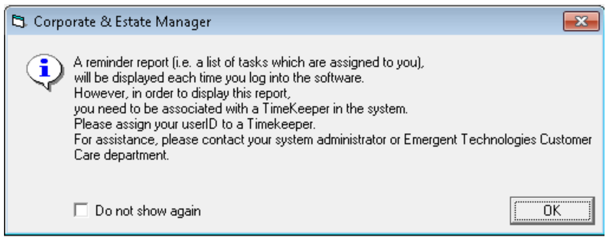
Workflow

The Workflow task reminder system is an integrated task management tool within Corporate and Estate Manager ET. Users are assigned tasks that populate Reminder Reports to manage the processing of Records. The Reminder Report opens each time Corporate and Estate Manager ET is started.

If the reminder system has not been configured with your Contact or Timekeeper details, the following message will be displayed:



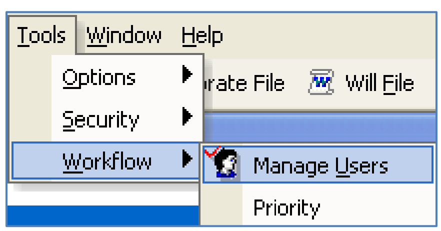
If the User will not be using workflow, check **Do Not Show again** to prevent from seeing this message at login.

Workflow Users

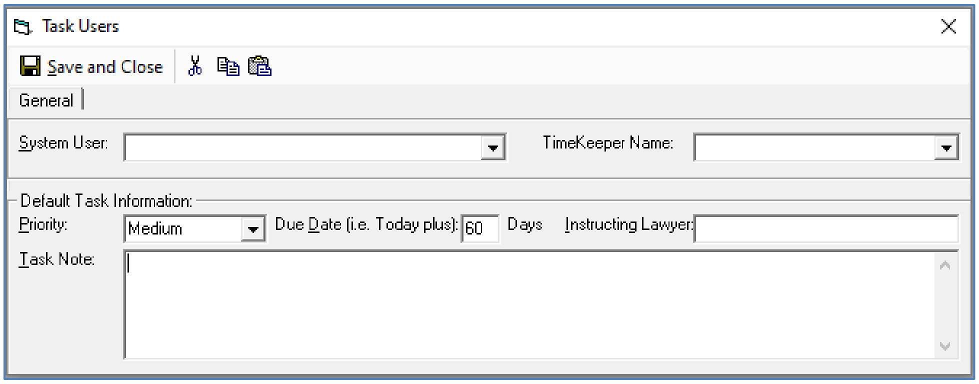
Any User who is listed as a **Timekeeper** can use Workflow and receive tasks.

The Timekeeper name and name used to log into Corporate Manger may be different. Because of this, Corporate Manager ET will need to know the relationship between login particulars and Timekeepers so that the correct tasks are assigned to the appropriate person. For Example, the Timekeeper Regis Smith may log in as Rsmith.

Select Tools > Workflow > Manager Users

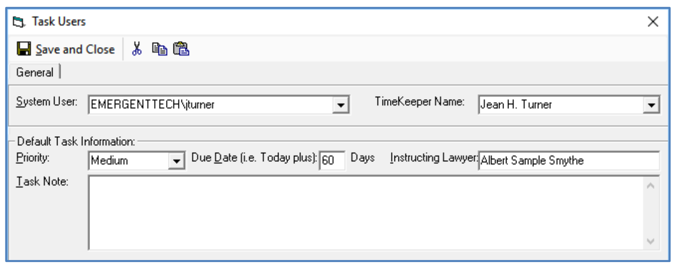


The Manage Users screen will allow you to make these relationships. From the System User drop down, select the User's Corporate and Estate Manager ET **Login Name** and then select the **Timekeeper Name** in the dropdown. Once this association is made, Corporate Manager ET will know to assign tasks to Regis Smith and display them when Rsmith logs in.



Default Task Values

Tasks have default values that make it quicker to assign tasks. These values can always be changed when assigning a task. This can be accessed by **Tools > Workflow > Manage Users**.



System User and Timekeeper Name – These can be the same or different individuals in your firm. For example, the Timekeeper Name could be the Lawyer or Clerk assigned to the Matter, and the System User could be the Assistant.

Priority – The priority for the Task. Set the Task priority to High, Medium or Low to better define the urgency of the Task. If priority is set to "High", then all Tasks will show High priority unless changed at the individual level.

Due Date – When this Task is scheduled for completion. You can enter 20 days to automatically create a Reminder Task for 20 days after documents have been sent to the Client.

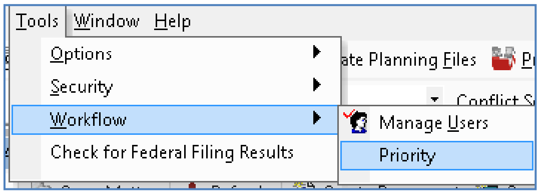
Instructing Lawyer – The instructing lawyer.

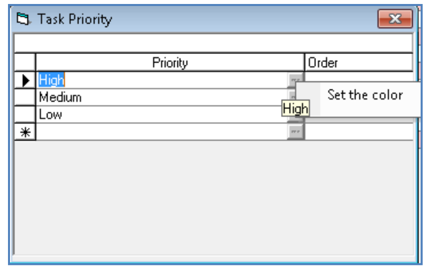
Task Note – Default Tasks details for the user.

NOTE: Any of these fields can be left blank (defaults do not have to be set) and completed each time a task is created or they can be changed at the individual Task level.

Task Priority

The Task Priority window allows you to define the colour, Order and Priority Values. By default, the priorities are set to Low, Medium and High. Click on **Tools > Workflow > Priority** and right-click on the  to set the colour for the task priority. Further Priorities can be added by clicking on the next empty field and entering a descriptive priority and setting the colour.


Tools
Window
Help
Options
Security
Workflow
Check for Federal Filing Results
Manage Users
Priority


Task Priority
Priority
Order
High
Medium
Low
Set the color
High