triSearch®

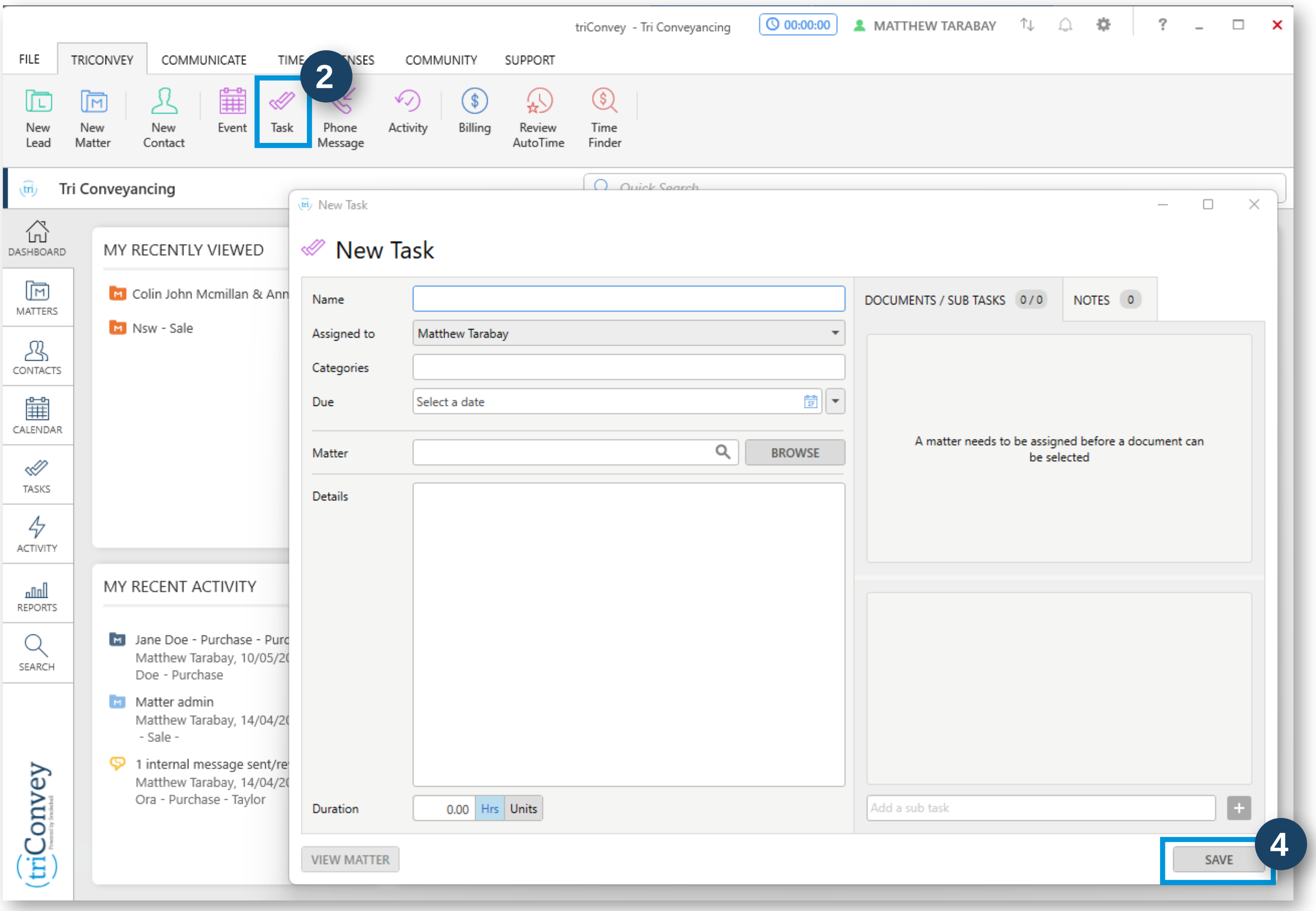
Training Guide

TASKS

- How to create and use tasks

Creating a new permanent task

1. Open triConvey to display the dashboard.
2. Select the ‘Task’ icon at the bottom of the dashboard.
3. Enter the details.
4. Select ‘Save’ once finished.



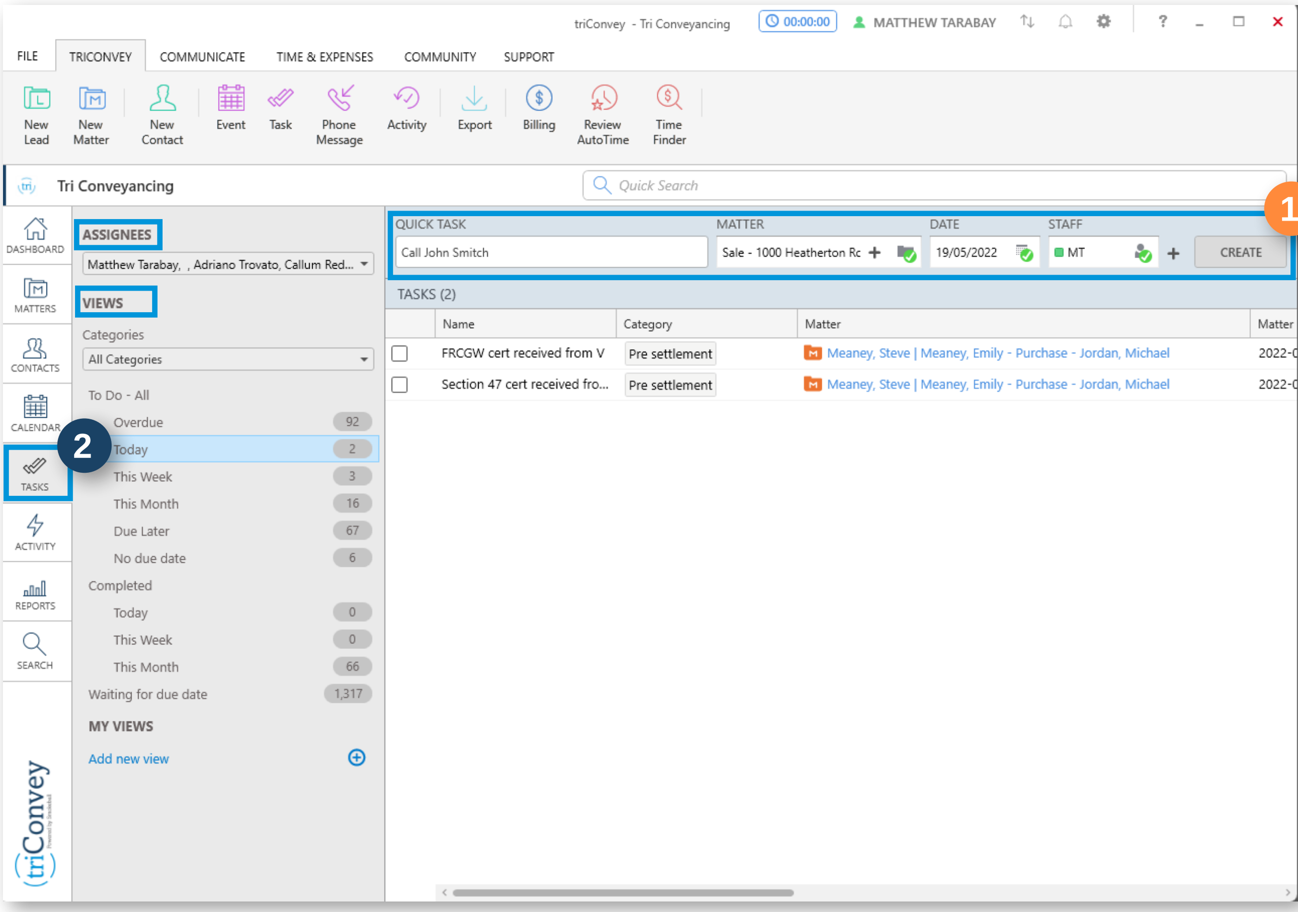
Finding existing tasks

1. Open triConvey to display the dashboard.
2. On the left-hand side of the menu, select 'Tasks' icon.
3. To see other user tasks, select the drop-down in the 'Assignees' option, and choose the appropriate user.
4. Task categories can be filtered by type and urgency under the 'Views' menu.

Creating a new one-off task from view page

- Repeat Steps 1 & 2 from 'Finding existing tasks'

1. At the top of the viewing section, enter a name in the 'Quick task' field.
2. Assign it to a matter in the 'Matter' field.
3. Select a completion date and assign it to any user in the following fields.
4. Select 'Create' once finished.



Adding a custom task view

1. Repeat Steps 1 & 2 from ‘Finding existing tasks’
2. Select the ‘Add new view’ hyperlink at the bottom of ‘My Views’ menu.
3. Enter the details.
4. Select ‘Apply View’ followed by ‘Add to my views’.