triSearch®

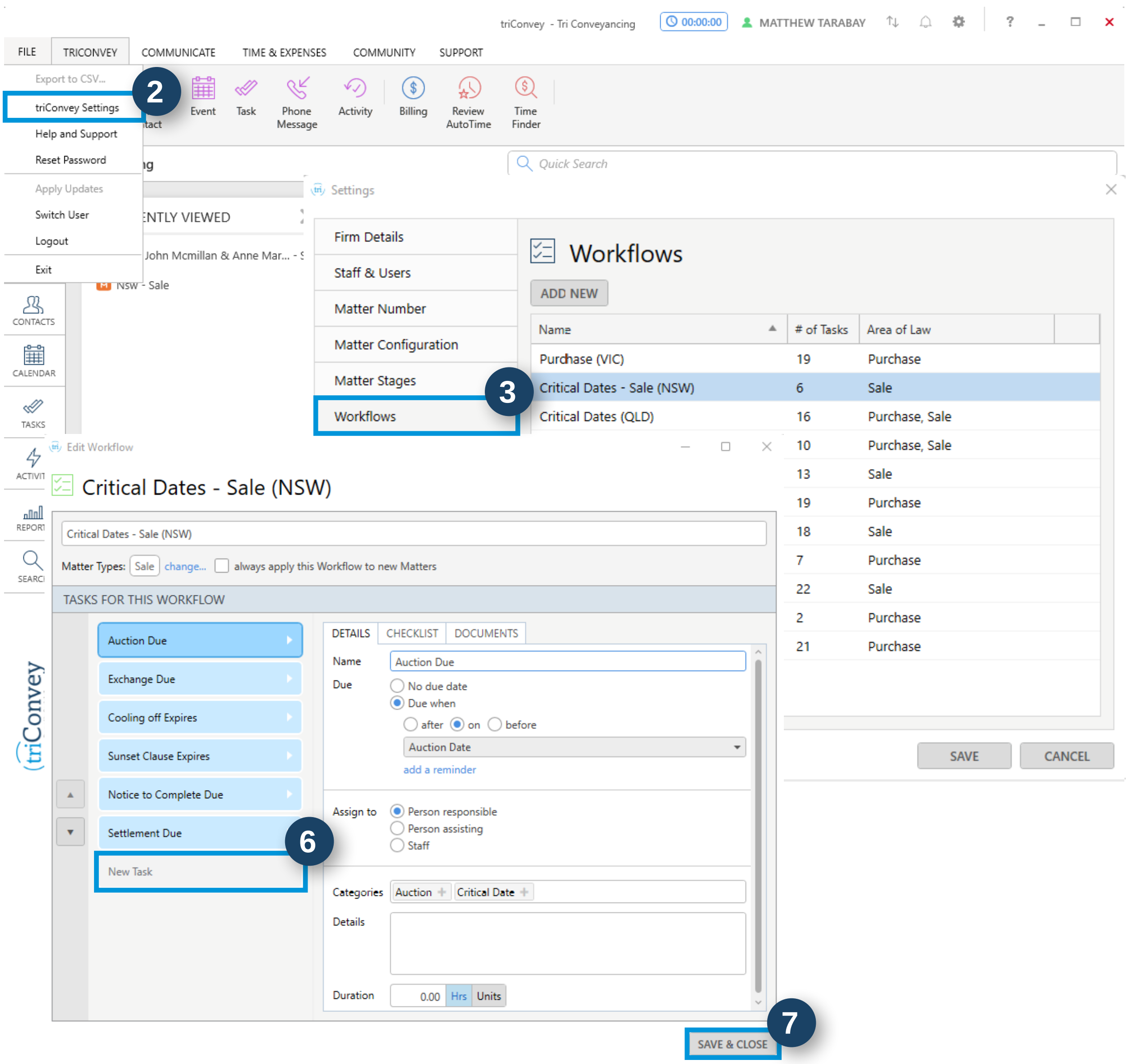
Training Guide

WORKFLOWS

- How to navigate workflows

Locate and edit existing workflows

1. Open triConvey to display the dashboard.
2. Select the ‘File’ tab in the top left corner and click on the ‘triConvey settings’ option.
3. Select ‘Workflows’ tab from the left-hand side.
4. Double click on the workflow you wish to edit.
5. Enter the intended details. NOTE: Precedent documents can be assigned to a specific workflow through the ‘Documents’ tab.
6. To add a new task, scroll to the bottom of the workflow tasks and select ‘New task’.
7. Enter the details and select ‘Save’. NOTE: You can reorder the new task with the arrows on the left-hand side.



Creating a custom workflow

1. Repeat Steps 1 to 3 from ‘Locate and edit existing workflows’.
2. Select ‘Add New’ button under ‘Workflows’ title.
3. Enter a workflow name in the top detail field.
4. Assign the new workflow to a specific matter type with the ‘change…’ hyperlink.
5. Select whether to apply the new workflow to all new matters.
6. To add a new task, follow Steps 6 & 7 in ‘Locate and edit existing workflows’.
7. Select ‘Save & Close’ button once finished.