How to Manage Matter Workflows

Objectives

- Add Workflows
- Add Workflow Statuses
- Manage Workflows

Steps

In LEXZUR, you can customize matter workflows to replicate the legal processes in your office

Add Workflow:

First, go to the System Settings, then Manage Workflows under the Matters settings.

	a 🛈 🗗 🗄	i o 🗳 🔊 🔯
		System Settings
		Billing and Plan
		Manage Users
		Add User
		Apps Marketplace
Matters		
Matter Client Positions		
Matters Success Probabilities		
Matter Company Roles		
Matter Person Roles		
Matter Container Statuses		
Stages		
Practice Areas & Due Dates		
Assignment Rules		
Custom Fields		
Matter Value Tiers		
Manage Workflows		
SLA Management		
Event Types		
Email Templates		

From this page, you will be able to manage and add your workflows.

A default workflow (System Workflow) is used when no workflows are selected.

Due Diligence		ble on: Litigation Case, Corporate Matter • Area: Acquisition, Agreement, Arbitration, Audit, Banking, Banking & finance, Collecti	on, Commercial, Constitutional Court	
Driminal				٥
Legal Team Review Administrative workflow		Status	Туре	Edit Workflow Delete Workflow
iystem Workflow (default)	٥ -	1-Review (Start Point)	Transitional Status	Add Workflow Statu List Transitions
	۰.	2-In Progress	Transitional Status	Export to Excel
	o -	3-Closed	Transitional Status	
	0.1	Rejected	Transitional Status	

The actions wheel on the top right allows you to edit a workflow, delete it, add statuses, list transitions, or export to Excel.

To add a new Workflow, click on the (+) sign next to the Manage Workflows

You must specify the Workflow name, and if it is applicable to Corporate Matters, Litigation Cases, or both, and the practice areas as well.

Add new workf	flow	×
Name*	Consultation Workflow	•
Applicable on*	Corporate Matter ×	-
Practice Area*	Consultation ×	
		Save Cancel

Add Workflow Statuses:

Once the new Workflow is added, you must now assign statuses to it. Therefore, click to add statuses

Settings / Manage Workflows / Workflow Statuses				
Manage Workflows 💿				
Consultation Workflow	Applicable on: Corporate Matter Practice Area: Consultation			
Due Diligence	٥	Ŧ		
Criminal	There are no statuses assigned to this workflow Click to Add			
Legal Team Review				
Administrative workflow				
System Workflow (default)				

Choose from the list of predefined statuses or add new ones on the fly.

Add Workflow Status				×
Name*	1-Review	-	·	•
			Save	Cancel

E.

Adding a new status requires specifying some details such as its name, category, and type.

Statuses should be nested under one of the four main categories: Open, In Progress, Done, and Cancelled.

Add Status		×
Name*	Name -	
Category*	Open 🔶 🗸	
	Global	
	_	
	Save	Cancel

Statuses could also be Global or Transitional. By default, all the added statuses will be Transitional unless you check the Global type.

A Transitional statuses allow you to customize your workflow based on different transitional steps including transition screens, notifications, and permissions.

Additionally, all workflow statuses will be listed on a separate page, that could be accessed from the **Workflow Statuses** hyperlink on the top of the page. Here you can also add new statuses, edit, or delete the existing ones, and track all the statuses with their type and categories.

Settings / Manage Workflows / Workflow Statuses / Add					
Total Records: 14					
Status	Туре	Category	Actions		
1-Review	Transitional Status	open	Edit Delete		
2-In Progress	Transitional Status	in progress	Edit Delete		
3-Closed	Transitional Status	done	Edit Delete		
Cancelled	Global Status	cancelled	Edit Delete		
Closed	Global Status	done	Edit Delete		
Done	Global Status	done	Edit Delete		
In Progress	Global Status	in progress	Edit Delete		
Open	Global Status	open	Edit Delete		
Pending	Global Status	in progress	Edit Delete		
Question creation	Transitional Status	open	Edit Delete		
Rejected	Transitional Status	cancelled	Edit Delete		
Review	Global Status	open	Edit Delete		
Under Review	Transitional Status	open	Edit Delete		
Working on it	Transitional Status	in progress	Edit Delete		

Manage Workflows:

Once adding the new Workflow, you can now manage and customize it.

Settings / Manage Workflows / Workflow Statuses

Manage Workflows 💿					
Consultation Workflow	Applicable on: Corporate Matter Practice Area: Consultation				
Due Diligence			Ø -		
Criminal					
Legal Team Review		Status	Туре		
Administrative workflow	۰ -	Closed	Global Status		
System Workflow (default) Set as S Delete	Start Point	Done	Global Status		
		Open (Start Point)	Global Status		
	• •	Pending Internally	Transitional Status		
	•	Rejected	Transitional Status		
	• •	Under Review	Transitional Status		

Therefore, specify the starting point status, Add new transitions between the transitional statuses, list transitions, and so on.

Start Point Status, is the first workflow status of the matter or the case once created.

Settings / Manage Workflows / Workflow Statuses

Manage Workflows 💿

Consultation Workflow		Applicable on: Corporate Matter Practice Area: Consultation			
Due Diligence					o -
Criminal					
Legal Team Review			Status	Туре	
Administrative workflow		• •	Closed	Global Status	
System Workflow (default)		• •	Done	Global Status	
			Open (Start Point)	Global Status	
		۰ -	Pending Internally	Transitional Status	
	Add Transit View Transit List Transiti	tions	Rejected	Transitional Status	
	Set as Starl		Under Review	Transitional Status	

O Learn more about Transitional Workflows, and how to customize your workflow here.

The workflows will then be automatically assigned in matters/cases when they match the criteria of the workflow.

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!