How to Manage Matter Workflows

Objectives
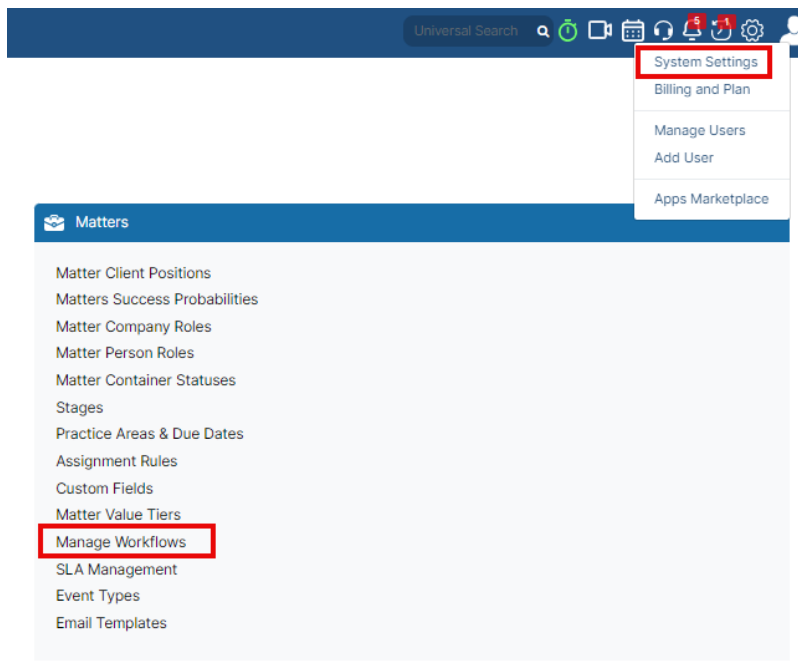
- Add Workflows
- Add Workflow Statuses
- Manage Workflows

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.

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.

Manage Workflows ⊕

| Applicable on: Litigation Case, Corporate Matter |
| Practice Area: Acquisition, Agreement, Arbitration, Audit, Banking, Banking & finance, Collection, Commercial, Constitutional Court |

Due Diligence
Criminal
Legal Team Review
Administrative workflow
System Workflow (default)

	Status	Type
✿ ▾	1-Review (Start Point)	Transitional Status
✿ ▾	2-In Progress	Transitional Status
✿ ▾	3-Closed	Transitional Status
✿ ▾	Rejected	Transitional Status

✿ ▾
Edit Workflow
Delete Workflow
Add Workflow Status
List Transitions
Export to Excel

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 workflow ✕

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

Manage Workflows ⊕

Consultation Workflow
Due Diligence
Criminal
Legal Team Review
Administrative workflow
System Workflow (default)

| Applicable on: Corporate Matter |
| Practice Area: Consultation |

There are no statuses assigned to this workflow. Click to Add

✿ ▾

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

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.

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

> ⚠ 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	Type	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.

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.

✓ 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!