

How to Manage Archived Matters

Objectives

- Archive Matters
- Unarchive Matters

Steps

Archive Matters:

Open the Corporate Matters/Litigation Case Grid, click on the actions wheel next to the matter you want to archive, and click on **Archive**.

Corporate Matters		All	Save as	Export	Tools		
ID	Workflow Status	Client Name	Name	Practice Area	Assignee	Arrival Date	Important Development
M00000237	In Progress	BLP industry	legal opinion on Service Agreement	Agreement	Alice Jones	2023-06-08	[2023-06-08 12:25:00]:12
M00000222	In Progress	Albert Insurance Company	Legal opinion on Agreements	Legal opinion	Carolina Robinson	2023-05-17	
M00000221	1-Review	Coolpany Insurance company	Banking Consultation	Banking & finance	Carolina Robinson	2023-05-17	
M00000219	Completed	BLP industrv	Consultation for Paul Jones	Consultation	Carolina Robinson	2023-05-16	

Unarchive Matters:

Archived matters will be no longer visible from the list of matters, therefore to access the list of unarchived matters you need to search for it:

Open **Advanced Set Archived Status to Yes Submit**

External Advisors	Equal	Start typing	Matter Container	contains	
Archived	Equal	Yes	Visible from Client Portal	Equal	either
Stage	Equal	Select	Modified On	Equal	YYYY-MM-DD
Modified By	contains	Start typing	Created On	Equal	YYYY-MM-DD
Created By	contains	Start typing	Statement of Accou...	contains	
Name of First Party	contains		Department	Equal	Select
Custom Field	contains		Date & Time	contains	HH:MM
Date & Time	Equal	YYYY-MM-DD	Company Name	Equal	
Billing Arrangement	contains				

Reset **Submit** [Hide]

Corporate Matters		All	Save as	Export	Tools		
ID	Workflow Status	Client Name	Name	Practice Area	Assignee	Arrival Date	Important Development

Similarly, from the archived matter list, click **Unarchive** right next to the matter you wish to unarchive.

Corporate matters All Save as

1 - 15 of 15 items

<input type="checkbox"/>	ID	Practice Area	Assignee
<input type="checkbox"/>	M0000230	Claim	
<input type="checkbox"/>	M0000232	Corporate	
<input type="checkbox"/>	M0000231	Consultation	Aleen Peterson
<input type="checkbox"/>		consultation	
<input type="checkbox"/>		legal opinion	Carolina Robinson
<input type="checkbox"/>		legal opinion	Carolina Robinson
<input type="checkbox"/>		agreement	
<input type="checkbox"/>		review	
<input type="checkbox"/>		legal opinion	
<input type="checkbox"/>		other	Alice Jones

- View / Edit
- Log Time
- Start Timer
- Unarchive ←
- Convert To Litigation
- Add Expense
- Export to Word
- Show in Client Portal
- Show SLA Elapsed Time
- Delete

You can select multiple matters/cases to be archived or unarchived, simply via the Tools button

Corporate Matters All Save as Export Tools

1 - 50 of 108 items

<input type="checkbox"/>	ID	Practice Area	Assignee	Name	Arrival Date	Client Name	Workflow Status	Info
<input checked="" type="checkbox"/>	M0000237	Agreement	Alice Jones	legal opinion on Service Agreement	2023-06-08	BLP Industry	In Progress	[2023-06-08 12:25:00]:1
<input checked="" type="checkbox"/>	M0000235	Legal opinion	Carolina Robinson	Legal Opinion for ABC	2023-06-02	ABC Services	In Progress	
<input checked="" type="checkbox"/>	M0000234	Agreement		Legal Opinion on NDA	2023-05-30	Dave Security System	1-Review	
<input type="checkbox"/>	M0000229	Agreement	Alice Jones	Legal Opinion on Purchase Agreement for BLP	2023-05-22	BLP Industry	Pending Internally	[2023-05-2 15:47:00]: S
<input type="checkbox"/>	M0000228	Consultation		Legal Review for Adam	2023-05-22		Under Review	[2023-05-22 13:10:47]: r

- Manage Filters
- Archive
- Unarchive
- Change Assignee

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

Thank you!