

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

1 - 50 of 109 items

Search

Advanced

Columns

<input type="checkbox"/>	ID	Workflow Status	Client Name	Name	Practice Area	Assignee	Arrival Date	Important Development
<input type="checkbox"/>	M00000237	In Progress	BLP industry	legal opinion on Service Agreement	Agreement	Alice Jones	2023-06-08	[2023-06-08 12:25:00]:12
<input type="checkbox"/>		View / Edit						
<input type="checkbox"/>		Log Time	Progress	ABC Services	Legal opinion	Carolina Robinson	2023-06-02	
<input type="checkbox"/>		Start Timer	Review	Dave Security System	Agreement		2023-05-30	
<input type="checkbox"/>		Archive	Open	Commercial Department	Consultation	Aleen Peterson	2023-05-24	
<input type="checkbox"/>		Convert To Litigation						
<input type="checkbox"/>		Add Expense						
<input type="checkbox"/>		Export to Word	ending Internally	BLP industry	Agreement	Alice Jones	2023-05-22	[2023-05-2 15:47:00]: Se
<input type="checkbox"/>		Show in Client Portal						
<input type="checkbox"/>		Show SLA Elapsed Time	nder Review		Consultation		2023-05-22	[2023-05-22 13:10:47]: m
<input type="checkbox"/>		Delete	ending	ABC Services	Legal opinion	Micheal Cavino	2023-05-19	
<input type="checkbox"/>	M00000222	In Progress	Albert Insurance Company	Legal opinion on Agreements	Legal opinion	Carolina Robinson	2023-05-17	
<input type="checkbox"/>	M00000221	1-Review	Coolpany Insurance company	Banking Consultation	Banking & finance	Carolina Robinson	2023-05-17	
<input type="checkbox"/>	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

Archived

Equal

Yes

Stage

Equal

Select

Modified By

contains

Start typing

Created By

contains

Start typing

Name of First Party

contains

Custom Field

contains

Date & Time

Equal

YYYY-MM-DD

Billing Arrangement

contains

Matter Container

contains

Visible from Client Portal

Equal

either

Modified On

Equal

YYYY-MM-DD

Created On

Equal

YYYY-MM-DD

Statement of Accou...

contains

Department

Equal

Select

Date & Time

contains

HH:MM

Company Name

Equal

Reset

Submit

[Hide]

Corporate Matters

All

Save as

Export

Tools

1 - 15 of 15 items

Search

Advanced

Columns

<input type="checkbox"/>	ID	Workflow Status	Client Name	Name	Practice Area	Assignee	Arrival Date	Important Development
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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"/>	M00000230	Claim	
<input type="checkbox"/>	M00000232	Corporate	
<input checked="" type="checkbox"/>	M00000231	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

Search

<input type="checkbox"/>	ID	Practice Area	Assignee	Name	Arrival Date	Client Name	Workflow Status	In
<input checked="" type="checkbox"/>	M00000237	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"/>	M00000235	Legal opinion	Carolina Robinson	Legal Opinion for ABC	2023-06-02	ABC Services	In Progress	
<input checked="" type="checkbox"/>	M00000234	Agreement		Legal Opinion on NDA	2023-05-30	Dave Security System	1-Review	
<input type="checkbox"/>	M00000229	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"/>	M00000228	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!