

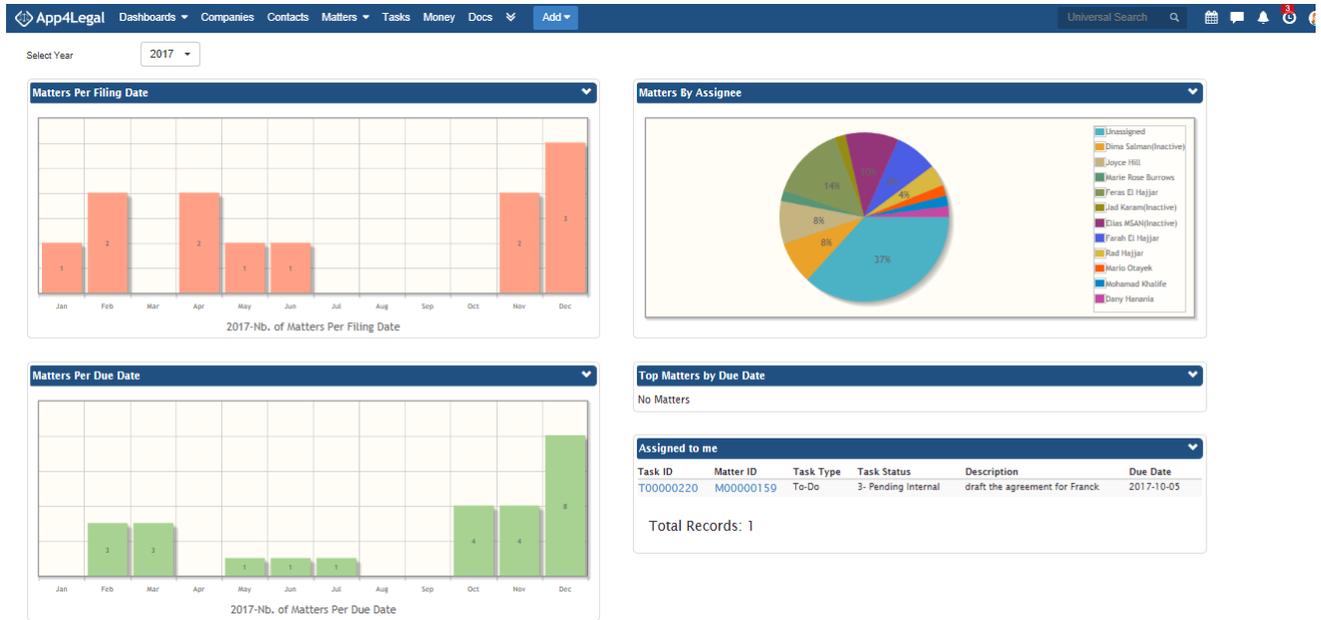
360-degree Boards

There are 3 types of boards available in App4Legal:

- [Management Dashboard](#)
- [Matter Board](#)
- [Task Board](#)

Management Dashboard

The Dashboard displays some useful statistics to provide you an idea about the activity and performance of the team. Graphics are for instance Matters Per Filing Date, Matters Per Assignee, Matters per Due Dates, My Recent Tasks (that are assigned to the logged in user), Companies edited recently and more. Navigation to years backwards is also possible.



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Matter Board

• What it is?

Matter Board is a 360-degree Kanban Board in which Matters are put in columns that reflect the Statuses. This Board can perfectly give an idea about the overall activity of the team, the work progress and the situation of the Matters being handled. Color Coding of Matter Priorities is reflected on the Board in order to better assist the user in building schedules and action plans for instance Critical Matters are in red, Medium Priority Matters are in blue and so on.

Columns in the Matter Board can hold one or more Matter Status. Columns on Boards can be named as desired in an easy configurable interface (discussed below). Matter Boards also have post filters that can be accessed using the filter like shape.

A Kanban board has a great functionality that allows dragging tickets through columns in order to swiftly update the Status. Matters in a Matter Board are depicted the form of draggable tickets in which the user can drag and drop a matter to the desired column in order to change the Status directly from the Board. Changing the Status of the Matter strictly abides by the Matter Workflow defined in the Admin & Setup. Columns that have 2 or more Statuses are divided so as to give a section to every Status.

In order to apply filters, users can click on the filter icon.

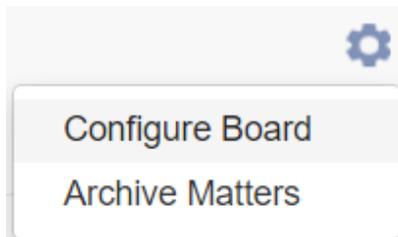
Quick Filters: Assigned Team: All | Assignee: Start typing | All: Assigned | Arrival Date: YYYY-MM-DD | Due Date: YYYY-MM-DD | Practice Area: All | Client: | Start typing | Category: All | Priority: All

Open	Review	Approved	Pending	In Progress
37	7	6	5	24
<ul style="list-style-type: none"> Sales Agreement (M0000097) - 2020-03-13 Sales Agreement (M0000113) - 2020-05-15 Legal request from BDC (M0000124) - 2020-06-30 Software Advice for Branlair (M0000128) 	<ul style="list-style-type: none"> 2-Review Annual General Meeting-2... (M0000059) - 2019-11-30 [Sales Agreement] Micros... (M0000088) - 2020-02-29 Annual General Meeting-2... (M0000050) 	<ul style="list-style-type: none"> Debt Collection Dispute (M0000089) - 2020-07-31 Trade License (M0000025) 2020/102 Hegmann vs Pa... (M0000055) Legal advice (M0000057) 	<ul style="list-style-type: none"> 5-Rejected Tracker: Service Agreee... (M0000056) - 2019-11-30 [101 2020]Hegmann vs Ab... (M0000073) - 2020-01-31 Examination Objected Appeal of Huda ... (M00000112) 	<ul style="list-style-type: none"> M-Commercial Diligence (M0000041) - 2019-07-09 Loan Fraud (M0000048) - 2019-07-31 Real Estate Dispute (M0000049) - 2019-07-31 Human Resources (Internal) (M00000118)

Manage Filters:

The Board has quick filters for Assigned Team, Assignee, Filter on the Assigned/Unassigned matters, Arrival Date, Due Date, Practice Area and client.

Post Filters can then be managed from the action wheel on the top right of the Board in the Post Filters tab.



Archive/Unarchive Matters:

You may wish to Archive Matters in order to decrease the size of entries on grids. Archiving is done through the Matters Board.

Archiving is done based on the Default Archive Matter Status that is defaulted in the [Setup & Configuration](#) -> Default Values in the Settings. Multiple Statuses can be set. Once the Archive Matters is clicked the system will prompt a message to make sure that the user wants to Archive Matters having the specified Status(es).

In order to **Unarchive Matters**, you need to go to the Matters grid -> Advanced Search -> Archived field choose it to be Yes and click Submit.

Requested By	contains	Start Typing	Priority	Equal	Select
Effective Effort	Equal		Estimated Effort	Equal	
Outsource to	contains	Start Typing	Case Value (AED)	>=	
Recovered Value (AED)	>=		Judgment Value (AED)	>=	
Court Type	Equal	Select	Archived	Equal	No
Court Region	Equal	Select	Court Degree	Equal	Yes
					No

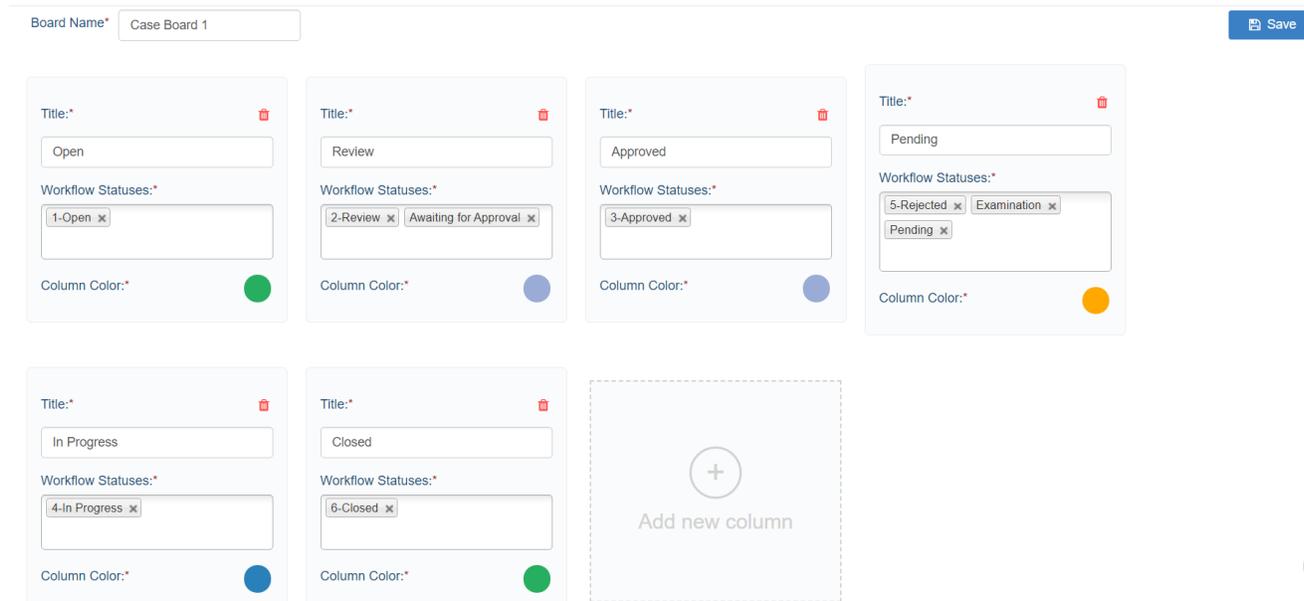
It will display all the Archived Cases. Then on the grid, mark the Cases that you wish to unarchive, click on the Tools button -> Unarchive.

This action will retrieve all the marked Archived Matter back to the grid and Matter Board.

• **Configure Matter Board**

Matter Board can then be configured from the action wheel on the top right of the Board.

The configuration interface is easy and friendly. Board Name is the text field where the Matter Board Name is inserted. . You can add columns from the plus sign Add new column. Every column in the Board is designated with a name.



Under the column name, the Workflow Statuses is where the Matter Statuses related to this column are added. Multiple Statuses can be related to one column. Once the user clicks on the blank, the system will display all the unused Case Statuses. Matter Statuses are added from the Matter Workflow in the Settings.

From the header of the page, the user can navigate to the list of Matter Boards in the Settings by clicking on the Matter board link.

[Settings](#) / [Matter Board](#) / [Edit Board](#)

In the Matter Board list, the user can add, edit, view and delete a Board.

[Settings](#) / [Matter Board](#) / [Add New Board](#)

List of Matter Boards

Board Name	Number of Columns	Created By	Created On	Last Modified By	Last Modified On	Actions
Case Board 1	6			Victor Stapleton	2021-05-26 18:27:15	

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Task Board

• **What it is?**

Task Board is a 360-degree Kanban Board in which Tasks are put in columns that reflect the Statuses. This Board can perfectly give an idea about the overall activity of the team, the work progress and the situation of the Tasks being handled. Color Coding of Task Priorities is reflected on the Board in order to better assist the user in building schedules and action plans for instance Critical Tasks are in red, Medium Priority Tasks are in blue and so on.

Columns in the Task Board can hold one or more Task Status. Columns on Boards can be named as desired in an easy configurable interface (discussed below). The Task Board supports up to 6 columns. Task Boards also have post filters that can be accessed using the filter like shape.

A Kanban board has a great functionality that allows dragging tickets through columns in order to swiftly update the Status. Tasks in a Task Board are depicted the form of draggable tickets in which the user can drag and drop a Task to the desired column in order to change the Status directly from the Board. Columns that have 2 or more Statuses are divided so as to give a section to every Status.

App4Legal Dashboards Companies Contacts Cases Tasks Money Docs Add Search

Task Board Name: Kanban Task Board

Open	In Progress	Pending Internal	Pending External	Done
<ul style="list-style-type: none"> T00000035 analyze the shared legal 2015-09-14 T00000036 Check with the client 2015-09-14 T00000037 Follow up on the progress 2015-09-14 T00000038 Ping the client to get in... 2015-09-14 	<ul style="list-style-type: none"> T00000094 Revise contracts 2015-08-12 T00000045 Jad Karam is assigned on... 2016-02-13 T00000044 Ted Adams is assigned on... 2016-03-10 T00000091 Meet with the client 2016-06-08 	<ul style="list-style-type: none"> T00000025 translate doc 2015-06-25 T00000023 Organize internal Documen... 2015-07-08 T00000041 Marie Rose Burrows is as... 2016-01-08 T00000039 please call xyz and zsk f... 2016-01-29 	<ul style="list-style-type: none"> T00000020 Check the uploaded Docume... 2015-06-30 T00000024 check the updates 2015-06-30 T00000022 Translate the documents o... 2015-07-02 T00000026 Dima to call the client 2015-07-02 	<ul style="list-style-type: none"> T00000028 Schedule a demo on App4Le... 2015-06-30 T00000029 Schedule a demo on App4Le... 2015-06-30 T00000027 brainstorm on the case 2015-07-02 T00000021 Get feedback from client 2015-07-03

• **Manage Filters:**

The Board has quick filters for Received by Team, Assignee, Case, Due Date and Creation Date. These Filters can be saved under Filter Names using the Save Filter hyperlink.

Task Board Name: Kanban Task Board

Assigned Team: Contract Mgmt Team Assignee: All Case: Start typing Creation Date ≥: YYYY-MM-DD Due Date ≤: YYYY-MM-DD

Save Filter As Reset

Save Filter As

Filter Name*

Save Cancel

Open	In Progress	Pending Internal	Pending External	Done
<ul style="list-style-type: none"> T00000104 follow-up on Case X 2016-08-24 T00000133 sdfsd 2016-11-03 T00000170 do X Y Z 2016-12-08 	<ul style="list-style-type: none"> T00000075 todo today 2016-06-13 T00000078 This is my Task 2016-06-16 T00000198 demo for Chalhoub Group 2017-04-18 	<ul style="list-style-type: none"> T00000069 please follow-up on XYZ 2016-04-21 	<ul style="list-style-type: none"> T00000053 Review documents dgdsd 2016-02-12 T00000054 Contact Court and communi... 2016-02-05 	<ul style="list-style-type: none"> T00000048 Meeting with the Experts 2016-02-13 T00000058 Elias MSAN is assigned o... 2016-02-19 T00000073 go close the door 2016-05-09

Filters can then be managed from the action wheel on the top right of the Board.

Task Board Name: Kanban Task Board Saved filters: Team Tasks

Assigned Team: Contract Mgmt Team Assignee: All Case: Start typing Creation Date ≥: YYYY-MM-DD

Save Filter As Reset

Configure Board

Archive Tasks

Delete All Filters

Delete Selected Filter

Open	In Progress	Pending Internal	Pending External	Done
<ul style="list-style-type: none"> T00000104 follow-up on Case X 2016-08-24 T00000133 sdfsd 2016-11-03 T00000170 do X Y Z 	<ul style="list-style-type: none"> T00000075 todo today 2016-06-13 T00000078 This is my Task 2016-06-16 T00000198 demo for Chalhoub 	<ul style="list-style-type: none"> T00000039 please call xyz and zsk f... 2016-01-29 T00000069 please follow-up on XYZ 2016-04-21 	<ul style="list-style-type: none"> T00000046 Research Evidences commen... 2016-02-05 T00000053 Review documents dgdsd 2016-02-12 	<ul style="list-style-type: none"> T00000048 Meeting with the Experts 2016-02-13 T00000058 Elias MSAN is assigned o... 2016-02-19 T00000073

• **Archive/Unarchive Tasks:**

You may wish to Archive Tasks in order to decrease the size of entries on grids. Archiving is done through the Task Board.

Task Board Name: Saved filters:

Assigned Team: Assignee: Case: Creation Date ≥:

Save Filter As

Configure Board
 Archive Tasks
 Delete All Filters
 Delete Selected Filter

Open 7	In Progress 3	Pending Internal 2	Pending External 5	Done 7
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> T00000104 follow-up on Case X 2016-08-24 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> T00000133 sdfsdf 2016-11-03 </div> <div style="border: 1px solid #ccc; padding: 5px;"> T00000170 do X Y Z </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> T00000075 todo today 2016-06-13 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> T00000078 This is my Task 2016-06-16 </div> <div style="border: 1px solid #ccc; padding: 5px;"> T00000198 demo for Chalnuh </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> T00000039 please call xyz and zsk 2016-01-29 </div> <div style="border: 1px solid #ccc; padding: 5px;"> T00000069 please follow-up on XYZ 2016-04-21 </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> T00000046 Research Evidences 2016-02-05 </div> <div style="border: 1px solid #ccc; padding: 5px;"> T00000053 Review documents 2016-02-12 </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> T00000048 Meeting with the Experts 2016-02-13 </div> <div style="border: 1px solid #ccc; padding: 5px;"> T00000058 Elias MSAN is assigned 2016-02-19 </div> <div style="border: 1px solid #ccc; padding: 5px;"> T00000073 </div>

Archiving is done based on the Default Archive Task Status that is defaulted in the [Setup & Configuration](#)-> Default Values in the Admin & Setup. Multiple Statuses can be set. Once the Archive Tasks is clicked the system will prompt a message to make sure that the user wants to Archive Tasks having the specified Status(es).

In order to **Unarchive** Tasks, you need to go to the All Tasks grid-> Advanced Search-> Archived field choose it to be Yes and click Submit.

More Filters Criteria

Created By: <input type="text" value="contains"/> <input type="text" value="Start typing"/>	Created On: <input type="text" value="Equal"/> <input type="text" value="YYYY-MM-DD"/>
Archived: <input type="text" value="Equal"/> <input style="border: 1px solid #ccc; border-bottom: none; padding: 2px 5px;" type="text" value="No"/> <div style="border: 1px solid #ccc; border-top: none; padding: 2px 5px; margin-top: -1px;"> either </div> <div style="border: 1px solid #ccc; border-top: none; padding: 2px 5px; margin-top: -1px; background-color: #007bff; color: white;"> Yes </div> <div style="border: 1px solid #ccc; border-top: none; padding: 2px 5px; margin-top: -1px;"> No </div>	Due Date: <input type="text" value="Equal"/> <input type="text" value="YYYY-MM-DD"/>
Priority: <input type="text" value="Equal"/>	Effective Effort: <input type="text" value="Equal"/>
Location: <input type="text" value="contains"/> <input type="text" value="Start typing"/>	

[Hit]

My Tasks

ID	Type	Task Description	Assignee	Due Date	Task Status	Priority	Related Case
<input type="checkbox"/> T00000191	Expert Visit	expert visit	Dima Salman	2017-02-14	1-Open أو تحت الدراسة	medium	C00000103

It will display all the Archived Tasks. Then on the grid, mark the Tasks that you wish to unarchive, click on the Tools button -> Unarchive.

App4Legal Dashboards Companies Contacts Cases Tasks Money Docs

My Tasks

ID	Type	Task Description	Assignee	Due Date	Task Status	Priority	Related Case
<input checked="" type="checkbox"/> T00000191	Expert Visit	expert visit	Dima Salman	2017-02-14	1-Open أو تحت الدراسة	medium	C00000103
<input type="checkbox"/> T00000095	To-Do	Follow up on the progress.	Dima Salman	2016-08-02	1-Open أو تحت الدراسة	medium	C00000030
<input type="checkbox"/> T00000093	To-Do	Meet with the Client	Dima Salman	2015-08-12	6 -Done أو تمت	medium	C00000020

This action will retrieve all the marked Archived Tasks back to the grid and Task Board.

• Configure Task Board

Task Board can then be configured from the action wheel on the top right of the Board.

Task Board Name: Saved filters:

Assigned Team: Assignee: Case: Creation Date ≥:

Save Filter As Reset

Open 7	In Progress 3	Pending Internal 2	Pending External 5	Done 7
T00000104 follow-up on Case X 2016-08-24	T00000075 todo today 2016-06-13	T00000039 please call xyz and zsk f... 2016-01-29	T00000046 Research Evidences commen... 2016-02-05	T00000048 Meeting with the Experts 2016-02-13
T00000133 sdfsd 2016-11-03	T00000078 This is my Task 2016-06-16	T00000069 please follow-up on XYZ 2016-04-21	T00000053 Review documents dgdsgd 2016-02-12	T00000058 Elias MSAN is assigned o... 2016-02-19
T00000170 dn X Y Z	T00000198 demo for Chalnhub			T00000073

The configuration interface is easy and friendly. Board Name is the text field where the Task Board Name is inserted. The Task Board supports up to 6 columns. You can add columns from the columns text field using the arrows. Every column in the Board is designated with a name.

Administration / Task Board / Edit Board

Task Board Information

Board Name*

Column(s).

Title*	Title*	Title*	Title*	Title*
<input type="text" value="Open"/>	<input type="text" value="In Progress"/>	<input type="text" value="Pending Internal"/>	<input type="text" value="Pending External"/>	<input type="text" value="Done"/>
Task Statuses* <input type="text" value="1-Open أو تحت الدراسة"/>	Task Statuses* <input type="text" value="2- In Progress أو بدأ العمل بها"/>	Task Statuses* <input type="text" value="3- Pending Internal أو معقولة داخليا"/>	Task Statuses* <input type="text" value="4- Pending External أو معقولة خارجيا"/>	Task Statuses* <input type="text" value="6- Done أو تمت"/>
Column Color* <input type="color" value="#003366"/>	Column Color* <input type="color" value="#996633"/>	Column Color* <input type="color" value="#336699"/>	Column Color* <input type="color" value="#663399"/>	Column Color* <input type="color" value="#669933"/>

Under the column name, the Task Statuses is where the Task Statuses related to this column are added. Multiple Statuses can be related to one column. Once the user clicks on the blank, the system will display all the unused Task Statuses. Task Statuses are added from the Task section in the Settings.

Task Board Information

Board Name*

Column(s).

Title*	Title*	Title*	Title*	Title*
<input type="text" value="Open"/>	<input type="text" value="In Progress"/>	<input type="text" value="Pending Internal"/>	<input type="text" value="Pending External"/>	<input type="text" value="Done"/>
Task Statuses* <input type="text" value="1-Open أو تحت الدراسة"/>	Task Statuses* <input type="text" value="2- In Progress أو بدأ العمل بها"/>	Task Statuses* <input type="text" value="3- Pending Internal أو معقولة داخليا"/>	Task Statuses* <input type="text" value="4- Pending External أو معقولة خارجيا"/>	Task Statuses* <input type="text" value="6- Done أو تمت"/>
Column Color* <input type="color" value="#003366"/>	Column Color* <input type="color" value="#996633"/>	Column Color* <input type="color" value="#336699"/>	Column Color* <input type="color" value="#663399"/>	Column Color* <input type="color" value="#669933"/>

1-Open أو تحت الدراسة
2- In Progress أو بدأ العمل بها
3- Pending Internal أو معقولة داخليا
4- Pending External أو معقولة خارجيا
5- Cancelled أو ألغيت
6- Done أو تمت
7- Reviewed by the Reporter

From the header of the page, the user can navigate to the list of Task Boards in the Settings:

In the Task Board list, the user can add, edit, view and delete a Board.

List of Task Boards



Board Name	Number of Columns	Created By	Created On	Last Modified By	Last Modified On	Actions
Task Board 1	6			William Singleton	2021-02-02 14:54:27	  

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