

How to Generate Matters Reports

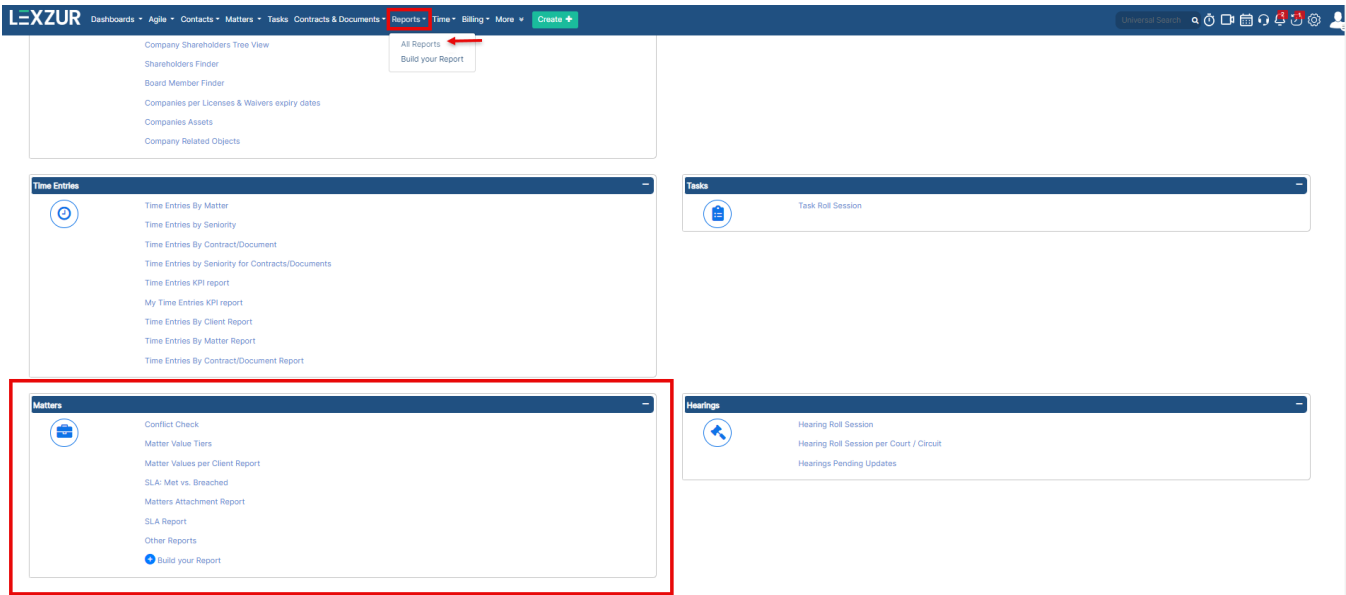
Objectives

- Generate Reports Related to Matters

Steps

In LEXZUR, you have many useful predefined **Reports** that are segregated as per each related module.

The Reports module can be accessed by clicking on Reports All Reports from the main menu.



Conflict of Interest:

The conflict of interest report shows all the related matters and companies for each company or person to identify and assess potential conflicts of interest that may arise in the course of representing clients.

All you have to do is to specify whether the contact is a Company or Person and specify its name. Automatically, the system will return a report that shows every company and matter related to this contact and indicates the type of this relation, whether it's an opponent, client, etc.

Reports / Conflict Check

Conflict Check

Company / GroupBLP industry (BLP)

Matters:

Relation	Matter ID	Name	Company Role	Description	Practice Area	Arrival Date	Filed on	Due Date	Closed On
Client & Related Company	M00000092	Legal Opinion for BLP			Administrative	2022-08-08	2022-08-08		
Client & Related Company	M00000096	BLP industry x Alvah 123			Constitutional Court	2022-08-24		2022-08-25	
Client & Related Company	M00000102	Business Card Reader	-		Case of Intellectual Property	-	-	-	-
Client	M00000104	BLP x ALvah		Acquisition 12342	Constitutional Court	2022-09-21		2022-10-07	
Client	M00000109	BLP industry x Bernadette		Ready to learn something new?	Criminal	2022-09-27	2022-09-27		
Client & Related Company	M00000113	Legal opinion for service agreement for BLP			Legal opinion	2022-09-28	2022-09-28	2022-10-08	
Client & Related Company	M00000115	Setting up our branch in KSA			Consultation	2022-10-03	2022-10-03		
Client & Related Company	M00000118	Legal opinion for BLP			Legal opinion	2022-10-31	2022-10-31	2022-11-16	
Client & Related Company	M00000120	Drafting a contract for BLP			Drafting of contracts	2022-11-04	2022-11-04	2022-11-11	
Client & Related Company	M00000123	Agreement related to BLP		it is an agreement between BLP and the	Agreement	2022-11-10	2022-11-10	2022-12-08	
Client & Related Company	M00000125	Test Case		Attached the hearing report	Banking	2022-11-14	2022-11-15		
Client & Related Company	M00000128	BLP industry x Bernadette			Criminal	2022-11-17	2022-11-17		

Matter Value Tiers Report:

This report distributes all the matters added in the system based on the practice area and according to specific range of matter value (value paid on matter in USD, for example).

Reports / Matter Value Tiers Report

Matter Value Tiers Report

Currency: USD

Value	0.00-10,000.00	10,000.01-50,000.00	50,000.01-100,000.00	100,000.01-250,000.00	250,000.01-1,000,000.00	>1,000,000.01
Practice Area	234	3	0	0	1	0
Civil	11 Matters					
Criminal	8 Matters					
Commercial	28 Matters	1 Matter				
Other	4 Matters					
Labor	10 Matters					
Real Estate	5 Matters					

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Matter Values Per Client Report:

This report allows the user to search for matter values by specifying the arrival date of these matters. The results will distribute the matter values according to each client (company or person).

Reports / Matter Values per Client Report

Matter Values per Client Report

Arrival Datebetween2023-01-01and2023-10-21Search

Currency: USD

Client	Value
Alvah Scott	300,000.00
ABC Services	22,000.00
BTL Insurance	20,000.00
Damac Properties	10,000.00
Global Tech	5,000.00
Commercial Department	2,000.00
Anastasia Batz	2,000.00
Digital Factory	200.00
Marie Alvah	0.00
Adam Christopher	0.00
Albert Cavin	0.00
Maria Smith	0.00
Mohamed Mustafa	0.00
Dave Security System	0.00
Advanced Solutions	0.00
Business Department	0.00
Back-Line Company	0.00
Josefine Josefine	0.00

SLA: Met Vs Breached :

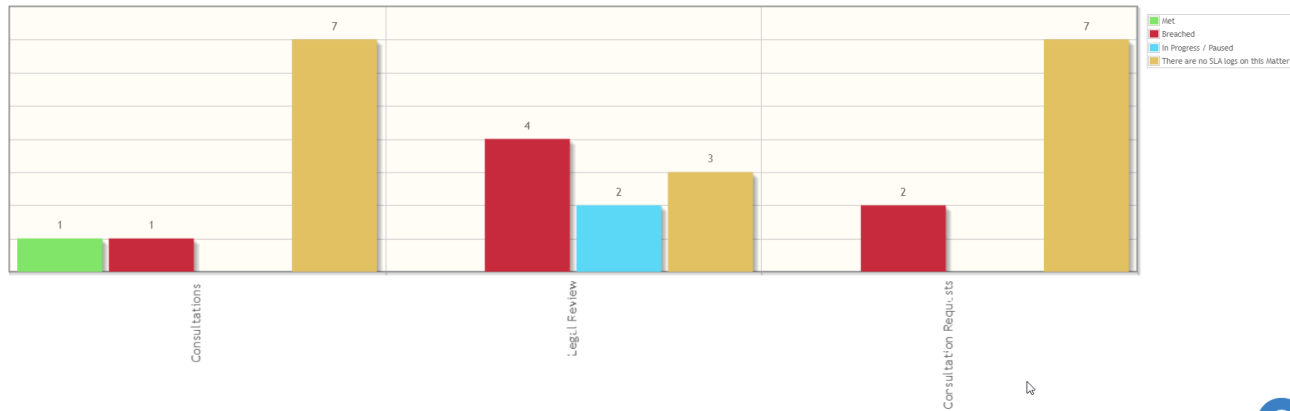
SLA: Met vs Breached report will show the matters and their SLA with the result of each SLA (met, breached, or in progress). The user should select the workflow and click on search.

SLA: Met vs. Breached

Number of Matters: 9

Select Workflow Consultation Workflow Search

Show Logs



Matters Attachment Report:

Matters Attachment Report

Actions

Matter ID	Reference Number	Category	Name	Client	Practice Area	Assignee	Status	Folders and Usage	Number of Files
M0000020		Matter	Trade License	william singleton	Audit		6-Closed		
M0000023	RN564214	Litigation	Rules and Regulations of the Company	Crafter Supply	Real Estate	Garry Malbeck	6-Closed		1
M0000024		Litigation	Article of Association	Crafter Supply	Administrative	Jad Herbert	6-Closed		
M0000025	1211	Matter	Trade License	Hound Corporation	Audit	Fred Morrison	3-Approved	Matter Notes Attachments	2
M0000026		Matter	Real Estate Disputes	Bandia Group	Administrative	Michael James	6-Closed		2
M0000027	RN54714514	Litigation	Commercial Lending and Real Estate Disputes	Crafter Supply	Administrative	Michael James	6-Closed	Hearings	9
M0000028	RN13465134	Litigation	Marriage Dissolution	Sterling Garey	Separation Agreements	Garry Malbeck	4-In Progress		
M0000029		Matter	Leasing Disputes	Brancy	Real Estate	Garry Malbeck	4-In Progress		

SLA Report:

The user should specify the workflow, the status (more than one status can be selected), and the due date. A new SLA report will be created.

SLA Report

Workflow* Consultation Workflow Status Paused, Stopped Due Date This Year 2023-01-01 2023-12-31

Submit

Settings

Consultations (0) (Met : 33.33 %)

Target: 1 week(s)

No Data									
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Legal Review (2) (Met : 0.00 %)

Target: 4 week(s)

Id	Elapsed Time	Client	Assignee	Created On	Practice Area	Arrival Date	Filed on	Due Date	Closed On
M00000259	Cycle 1: 1 week(s) 2 hour(s) 40 min(s) (Paused)			2023-07-20 17:00:28	Consultation	2023-07-20		2023-10-31	
M00000260	Cycle 1: 1 hour(s) 16 min(s) (Paused)			2023-07-20 17:13:09	Consultation	2023-07-20		2023-10-25	

Other Reports:

- Advanced Matter Report:

Advanced Matter Report

Actions

Matter ID	Name	Description	Important Development	Practice Area	Assigned Team	Est. Effort	Eff. Effort	Priority	Arrival Date	Filed on	Due Date
M00000304	legal opinion for BLP		[2023-10-17 11:25:06]: legal docs attached	Civil	All Teams		1h 30m	High	2023-10-17		
M00000303	test			Construction, Contracting	All Teams			Medium	2023-10-13		
M00000302	test			Insurance	All Teams			Medium	2023-10-13		
M00000301	test			Insurance	All Teams			Medium	2023-10-13		
M00000300	Micheal VS BLP company	litigation case related to real estate	[2023-10-12 11:35:24]: 123	Constitutional Court	Litigation Team		7h	High	2023-10-12		2024-01-31
M00000299	Legal Opinion on Service Agreement	A New Corporate Matter has been added by James Marven . Matter ID: M295 Matter Subject: Legal Opinion on Service Agreement Assignee: Alice Jones Client Name: App4Legal - File/Ref #: Description: A New		Legal opinion	All Teams		6h 24m	Medium	2023-10-11	2023-10-11	2023-10-25
M00000298	legal opinion			Civil	All Teams			Medium	2023-10-11		
M00000297	NBO x ABC	1 22 3	[2023-09-25 09:17:55]:here are the updates 1 2 3	Commercial	Litigation Team			High	2023-09-25		
M00000296	123/2023			Commercial	All Teams			High	2023-09-22		

- Matter Per Assignee Per Status:** This report shows all the matter that are related to specific assignee with respect to the workflow status (more than one workflow status can be selected)

Reports / Other Reports / Matters Per Assignee Per Status

Matters Per Assignee Per Status

Assignee

contains

Start typing

Workflow Status

Equal

2-In Progress 3-Closed

SearchReset

Advanced Search

Collapse All / Expand All

1 - 3 of 3 Services

100

James Marven (3)

2-In Progress (2)

Matter ID	Name	Practice Area	Assigned Team	Est. Effort	Eff. Effort	Priority	Filed on	Due Date	Status Comments	Litigation	Value	Archived
M00000170	BTL Insurance x ABC	Commercial	All Teams			Medium	2023-02-17			Yes	0.00	No
M00000285	Legal Advice for Banking Issue	Banking & finance	All Teams			Medium				No	0.00	No

3-Closed (1)

Matter ID	Name	Practice Area	Assigned Team	Est. Effort	Eff. Effort	Priority	Filed on	Due Date	Status Comments	Litigation	Value	Archived
M00000155	Legal opinion on Purchase Agreement	Commercial	All Teams			High				Yes	0.00	Yes

- Matters Per Assignee Per Due Date:** This report shows all matters related to a specific assignee and defined due date. The user has to specify the assignee and the due date and search for the results.

Matters Per Assignee Per Due Date

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▼ Carolina Robinson (59)

▼ Due Date not set (28)

Matter ID	Name	Practice Area	Assigned Team	Est. Effort	Eff. Effort	Priority	Workflow Status	Filed on	Status Comments	Litigation	Value	Archived
M00000230	Agency Grid X ABC Company	Arbitration	All Teams		36h	Medium	In Progress	2023-05-24		Yes	0.00	No
M00000093	Legal Opinion for QLA	Commercial	Corporate Team		3h 30m	Medium	Closed	2022-08-17		No	0.00	No
M00000114	Louis Vuitton x Mohammad Khalil & Co	Criminal	All Teams		1h	Medium	Open	2022-09-30		Yes	0.00	Yes
M00000127	Legal opinion for Service Agreement for Marubeni Corporation	Other	All Teams		89h 2m	Medium	Open	2022-11-16		No	0.00	Yes
M00000158	Legal opinion for Sedibelo Resources	Legal opinion	All Teams			Critical	Pending	2023-02-06		No	0.00	Yes
M00000177	Lauren Travis Vs Basil Crown	Insurance	All Teams		3h 30m	High	Open	2023-03-02		Yes	0.00	No
M00000178	Legal Consultation for Paul Jones	Consultation	All Teams		6h 48m	Medium	Open	2023-03-03		No	0.00	No

- **Matters Per Company Per Assignee:** This report shows all the matters that are related to specific company and assignee.

Matters Per Company Per Assignee

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▼ Company not set (97)

▼ Unassigned (34)

Matter ID	Name	Practice Area	Assigned Team	Est. Effort	Eff. Effort	Priority	Workflow Status	Filed on	Due Date	Status Comments	Litigation	Value	Archived
M00000005	استشارة قانونية لـ محمد الجندى	المحاماة	All Teams			Medium	Done	2021-09-27			No	500.00	No
M00000018	Sami X Advanced Business	Administrative	All Teams		2h	High	Done	2022-01-31	2022-06-16		Yes	0.00	No
M00000061	Legal Opinion For Rita Smith	Commercial	Corporate Team		1h 30m	Medium	Pending	2022-02-07	2022-06-26		No	0.00	No
M00000066	Legal opinion on Purchase- Agreement	Labor	All Teams			High	In Progress		2022-03-25		No	0.00	No
M00000076	Legal acquisition for Adnan	Acquisition	All Teams			Medium	Open	2022-06-			No	0.00	No

- **Matters Per Person Per Assignee:** This report shows all the matters that are related to a specific person and assignee. The user should specify the person and the assignee name and search for the results.

Matters Per Person Per Assignee

Persons contains Start typing

Assignee contains Start typing

Search Reset

Advanced Search

Collapse All / Expand All

1 - 2 of 2 Services

100

John Marvin (2)

Unassigned (1)

Matter ID	Name	Practice Area	Assigned Team	Est. Effort	Eff. Effort	Priority	Workflow Status	Filed on	Due Date	Status Comments	Litigation	Value	Archived
M00000063	John Marvin Vs Peter Insurance Company	Administrative	Litigation Team		9h 6m	High	In Progress				Yes	0.00	No

Sam Marvin (1)

Matter ID	Name	Practice Area	Assigned Team	Est. Effort	Eff. Effort	Priority	Workflow Status	Filed on	Due Date	Status Comments	Litigation	Value	Archived
M00000062	Legal opinion on Purchase Agreement	Labor	Corporate Team			Medium	Closed		2022-02-28		No	0.00	No

- Matters Per Company Per Role:** This report shows all the matters that are related to specific company with respect to the roles of these companies. Role could be Client, Defendant, Supplier, Opponent, etc.

Matters Per Company Per Role

Companies contains Start typing

Role Equal

Search Reset

Advanced Search

Collapse All / Expand All

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100

BLP industry (30)

Role not set (30)

Matter ID	Name	Practice Area	Assigned Team	Est. Effort	Eff. Effort	Priority	Workflow Status	Filed on	Due Date	Status Comments	Litigation	Value	Archived
M00000188	Legal opinion for Service Agreement for BLP	Legal opinion	All Teams		4h 42m	Medium	Done	2023-03-28	2023-04-05		No	0.00	No
M00000300	Micheal VS BLP company	Constitutional Court	Litigation Team		7h	High	In Progress		2024-01-31		Yes	0.00	No
M00000293	Risk Manag. Operational Readiness	Agreement	All Teams		4h 30m	Medium	1-Review				No	0.00	No
M00000287	Legal Opinion on Service Agreement	Legal opinion	All Teams			Medium	Closed	2023-08-29	2023-09-28		No	0.00	No
M00000284	Legal Opinion on Service Agreement	Legal opinion	All Teams			High	In Progress	2023-08-22	2023-08-31		No	0.00	No
M00000283	BLP industry x ABC services	Commercial	All Teams		1h	Medium	3-Closed				Yes	0.00	No
M00000274	DLP industry x ALvah	Commercial	All Teams			High	2-In Progress				Yes	0.00	No
M00000265	Legal Risk Assessment Finance	Consultation	All Teams		1h 30m	Medium	In Progress		2023-08-30		No	0.00	No
M00000254	BLP industry x ABC Services LLP	Commercial	All Teams			Medium	1-Review				Yes	0.00	No

- Matters Per Person Per Role:** This report shows all the matters that are related to a specific person with respect to the roles of this person. Role could be Client, Defendant, Supplier, Opponent, etc.

Matters Per Person Per Role

Persons

Role

[Search](#) [Reset](#)

[Advanced Search](#)

[Collapse All](#) / [Expand All](#)

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Alvah Scott (10)													
Role not set (10)													
Matter ID	Name	Practice Area	Assigned Team	Est. Effort	Eff. Effort	Priority	Workflow Status	Filed on	Due Date	Status Comments	Litigation	Value	Archived
M00000027	BOC x Coolpany	Banking	All Teams			High	Open	2022-02-08	2023-01-10		Yes	5,500.00	No
M00000030	Legal Opinion for California Bank	Corporate	All Teams			High	Done	2021-12-08	2022-01-09		No	0.00	No
M00000039	Legal Advice For Alvah Scott	Commercial	All Teams	2h	3h 30m	Medium	In Progress	2021-12-09	2022-01-05		No	500.00	No
M00000096	BLP Industry x Alvah 123	Constitutional Court	All Teams			High	In Progress		2022-08-25		Yes	0.00	No
M00000124	Back Boss Company x Alvah	Civil	All Teams			Critical	Open	2022-11-15			Yes	0.00	No
M00000126	Backboss Company x Bernadette	Criminal	All Teams		1h 30m	High	Open	2022-11-15			Yes	0.00	No
M00000170	BTL insurance x ABC	Commercial	All Teams			Medium	2-In Progress	2023-02-17			Yes	0.00	No
M00000173	HSBC x Mr. X	Commercial	All Teams	10h	1h	Medium	1-Review	2023-02-28			Yes	0.00	No
M00000197	Alvah-Divorce Case	Divorce	All Teams		3h	Medium	In Progress	2023-04-26			Yes	300,000.00	No

• Matters Per External Lawyer Per Status:

- **Report Builder:** Users have the option to customize a report that suits their businesses. From the Report Builder, users can choose the columns that they want to show in the report by just clicking on "+" next to each column name to add it to the selected items. Additional filters option is also available, where users can specify the Matter Client Position, the date when this matter was filed, the nationality of the opponent and the Matter category if it includes only litigation cases, corporate matter, intellectual property or all of them.

After submitting and saving, a new customized report will be created.

Build your Report

Report Columns List

Add All

4 items selected

Remove All

Search

Important Development

Assigned Team

Assignee

Requested By

Practice Area

Priority

Workflow Status

Status Comments

Matter ID

Internal Ref Number

Name

Description

Additional filters:

Matter Client Positions

Filed on

Opponent Nationality

Matter Category

☒ Limit Results to

[Submit](#)

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Thank you!