

How to Manage the Matter Board

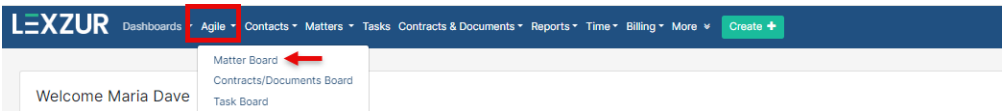
Objectives

- Monitor your team's performance through the Kanban boards
- Configure your matter board

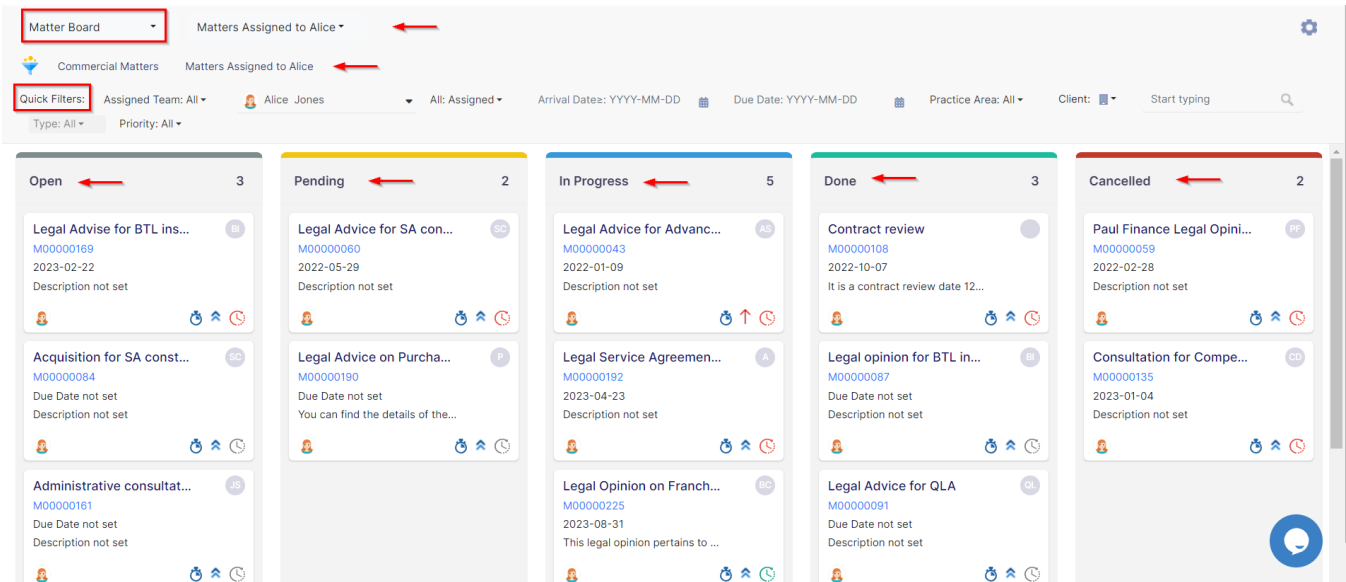
Steps

Managers can use Kanban boards to get a 360-degree view of matters, tasks, and contract statuses.

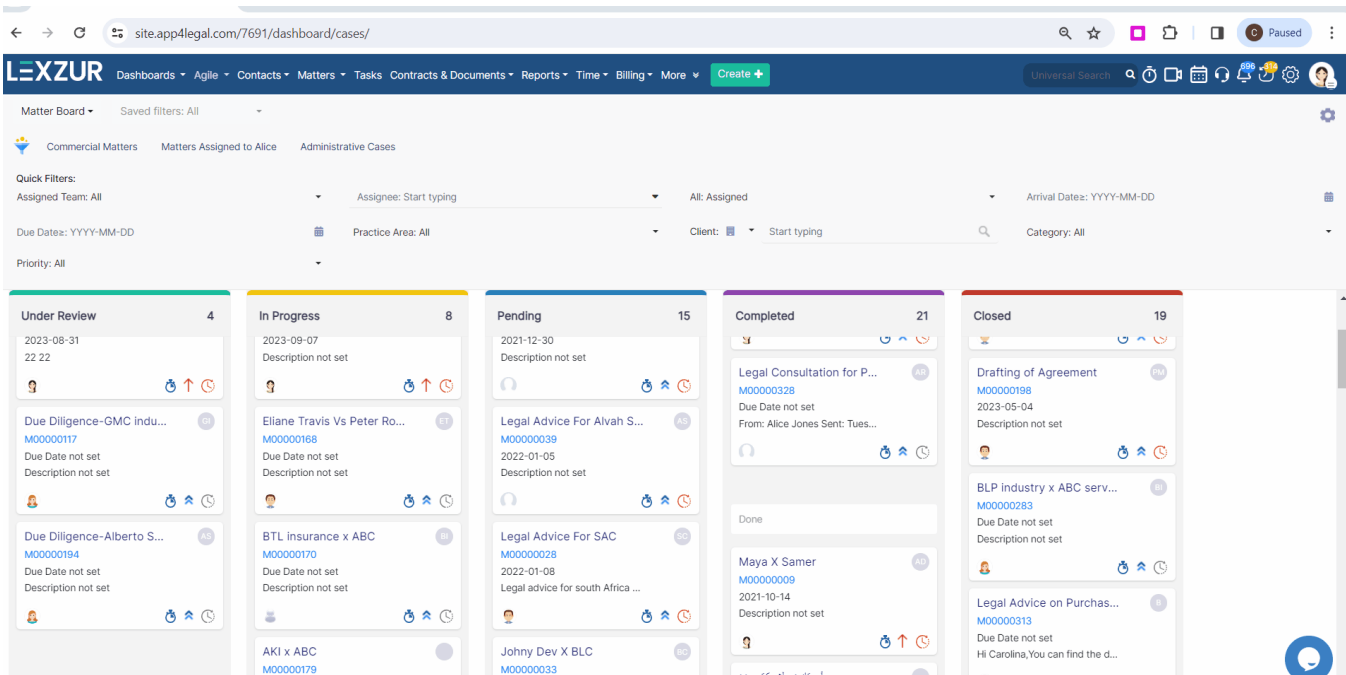
You can access these boards from the **Agile** in the main menu



This board can perfectly give an idea about the overall activity of the team, the work progress, and the status of the matters being handled.



The Color Coding of Matter Priorities is shown on the Board 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.




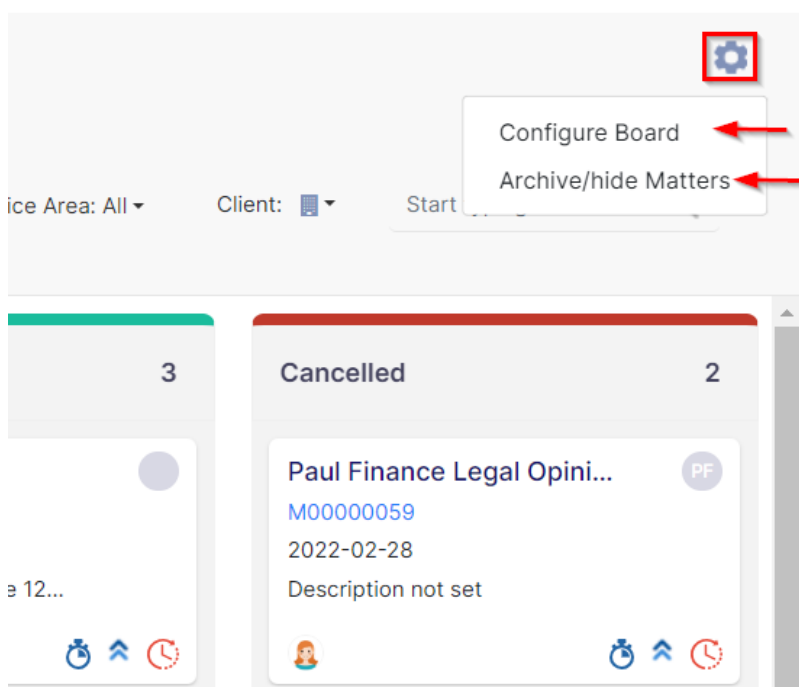
It is easy for managers to monitor the team's performance, the assigned person, priority, and due date as well.

Users can find information quickly using quick filters. They just need to click on the filter icon to enable them. The Board has quick filters for Assigned Team, Assignee, Arrival Date, Filed on Date, Due Date, and so on.

A Kanban board has great functionality that allows dragging tickets through columns in order to swiftly update the Status.

 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.



Additionally, you can show the archived or hidden matters as well. Choose the status, type, and closed on date.

Archive/hide Matters

Status

Closed

Type ?

Archive Matters

Closed On

Equal

2023-02-01

Save

Cancel



By default, archived/hidden matters will not show up on any boards. [Learn how to manage archives here](#)

You can also customize your Matter Boards to suit your specific needs. This way, you can set up the boards to display the information that is most relevant to you. For example, you can choose the columns that appear on the board, the labels that are used to categorize matter statuses, and the filters that are used to narrow down the matters that are displayed.

Settings / Matter Board / Edit Board

Matter Board Information

Post Filters

Board Name*

Matter Board

Save

Title:*

Open

Workflow Statuses:*

Open

Column Color:*

Title:*

Pending

Workflow Statuses:*

Pending

Column Color:*

Title:*

In Progress

Workflow Statuses:*

In Progress

Column Color:*

Title:*

Done

Workflow Statuses:*

Done

Column Color:*

Title:*

Cancelled

Workflow Statuses:*

Cancelled

Column Color:*

+

Add new column

App4Legal

Columns in the Matter Board can hold one or more Matter statuses and can be named as desired in an easily configurable interface.









The Matter Board supports up to 6 columns.

You can create multiple boards that you need - just hit the **Matter Board** link on the top and view the records of your boards, then add your own to that list.

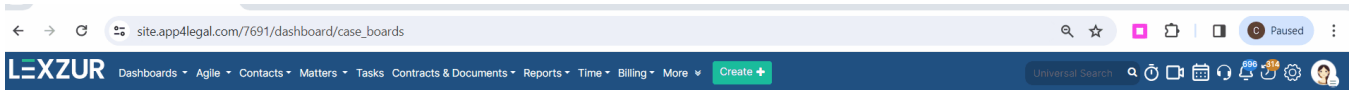
List of Matter Boards



Board Name	Number of Columns	Created By	Created On	Last Modified By	Last Modified On	Actions
Legal Review	5	Carolina Robinson	2023-06-09 08:40:31	Carolina Robinson	2023-06-09 08:40:31	  
Matter Board	5			James Marvin	2023-05-16 16:27:34	  









From this page, you can view the boards, and edit or delete them. It can be accessible from the System Settings at any time.



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Legal Review	5	Carolina Robinson	2023-06-09 08:40:31	Carolina Robinson	2023-06-09 08:40:31	  
Matter Board	5			Carolina Robinson	2024-01-18 10:11:03	  

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Matter Boards also have post-filters that can be accessed using the filter-like shape.

Matter Board Information

[Post Filters](#)Post Filters 

Name	field	Operator	Value
Commercial Matters	Practice Area	Equal	Commercial
Matters Assigned to Alice	Assignee	Equal	Alice Jones

You can create filters based on practice area, assignee, assigned teams, or priority.

Add New Post Filter

Name

Administrative Cases

Field

Practice Area

Operator

Equal

Value

Administrative

Save

Cancel

Add New Post Filter

Name

Field

Assignee

Assigned Team

Priority

Save

Cancel

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

Thank you!