How to Manage the Matter Board

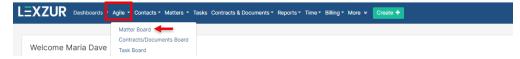
Objectives

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

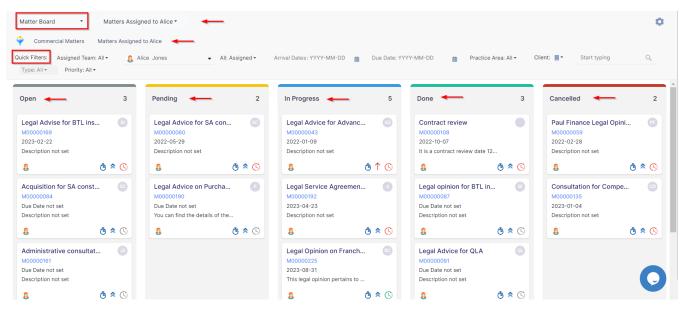
Steps

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.

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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.
 Configure Board
 Configure Board
 Archive/hide Matters
 Cancelled
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Additionally, you can show the archived or hidden matters as well. Choose the status, type, and closed on date.

Description not set

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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.

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



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.

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

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Settings / Matter Board / Edit Board				
Matter Board Information 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 Pos	t Filter	×
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Cancel

Assigned Team

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

Priority

Thank you!