

How to Generate Reports

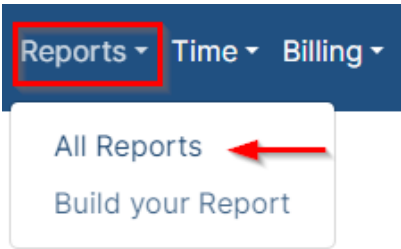
Objectives

- Generate reports using the system's predefined reports
- Build your own report
- Extract Information from Modules Grid

Steps

In LEXZUR you can have a 360-degree view of your team's performance through the reporting module.

The reporting module can be accessed from the main menu.



The report module has many useful predefined reports that are segregated as per each related module.

Companies

Company Shares By Date

Company Shares By Shareholder

Company Shareholder Votes

Company Shareholders Tree View

Shareholders Finder

Board Member Finder

Companies per Licenses & Waivers expiry dates

Companies Assets

Company Related Objects

Time Entries

Time Entries By Matter

Time Entries by Seniority

Time Entries By Contract/Document

Time Entries by Seniority for Contracts/Documents

Time Entries KPI report

My Time Entries KPI report

Time Entries By Client Report

Time Entries By Matter Report

Time Entries By Contract/Document Report

Persons

Persons Per Group Of Companies

Tasks

Task Roll Session



Matters

- Conflict of Interest
- Matter Value Tiers
- Matter Values per Client Report
- SLA: Met vs. Breached
- Matters Attachment Report
- SLA Report
- Cases
- Matters
- Matters Per Workflow
- Other Reports
- Build your Report

Contract/Document

- SLA: Met vs. Breached
- SLA Report

Hearings

- Hearing Roll Session
- Hearing Roll Session per Court / Circuit
- Hearings Pending Updates

These reports are a great way to group data and transform them into purposeful information. For example, one very important report for legal managers is the hearing roll session per court; this report allows legal managers to view the hearing sessions per court in a timely manner, or the Hearing Pending Updates that allow managers to view the list of hearings that are not yet updated.

Reports / Hearings Pending Updates

Hearings Pending Updates

1

2

3

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Advanced Search

50

Container ID	Matter ID	External/Court Reference	Stage	Hearing Date	Previous Hearing	Client	Client Foreign Name	Opponent	Opponent Foreign Name
	M00000082			2022-07-12 10:00		Albert smith			
	M00000065		First Instance (Judged)	2022-06-30 02:00	2022-06-22	Peter Finance		Paul Finance - Plaintiff	
	M00000065		First Instance (Judged)	2022-06-22 10:00		Peter Finance		Paul Finance - Plaintiff	
	M00000063		Arbitration (Judged)	2022-06-06 10:00		John Marven		Peter Insurance Company - Defendant	
	M00000063			2022-06-06 10:38		John Marven			
	M00000063		Execution (Ongoing)	2022-06-05 02:00	2022-05-27	John Marven		Peter Insurance Company - Defendant	
	M00000063		Execution (Ongoing)	2022-05-27 10:00		John Marven		Peter Insurance Company - Defendant	
MC00006	M00000058		First Instance (Suspended)	2022-04-30 10:00	2022-03-09	Paul Finance		Coolpany Insurance company - Co-plaintiff	
	M00000036			2022-03-28 10:00		Advanced			

Other important reports include Time entries KPI, Conflict of interest, SLA reports for matters and contracts, and so on...

Moreover, the user will be able to customize his own report and select the desired content from the report builder; these reports can be built once and then run at any time.

Learn more about customizing reports [here](#).

In addition to the predefined reports, the grids in each module enable users to get additional reports.

For example, you can get a report of all Closed corporate matters, Civil Litigation Cases, Approved Contracts, and so on, using the advanced search.

To do so, open the matter's grid for example, then from the Advanced Search enter your filter criteria and submit.

Corporate Matter Search Filters

Matter ID

contains

Practice Area

Equal

Select

Assignee

contains

Start typing

Workflow Status

Equal

Closed x

More Filters Criteria

Related Contributors

contains

Start typing

Persons

contains

Start typing

Important Development

contains

Client Name

Start typing

Client Foreign Name

Start typing

Referred By

contains

Start typing

Requested By

contains

Start typing

Effective Effort

Equal

Outsource to

Equal

Start typing

External Advisors

Equal

Start typing

Archived

Equal

No

Name

contains

Assigned Team

Equal

Select

Internal Ref Number

contains

Status Comments

contains

Companies

contains

Start typing

Arrival Date

Equal

YYYY-MM-DD

Filed on

Equal

YYYY-MM-DD

Due Date

Equal

YYYY-MM-DD

Closed On

Equal

YYYY-MM-DD

Priority

Equal

Select

Estimated Effort

Equal

Value (usd)

>=

Matter Container

contains

You can then export the results into an Excel Sheet.

Corporate Matters

All

Save as

Export

Tools

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Search

Advanced

Columns

ID	Name	Workflow Status	Client Name	Practice Area	Assignee	Arrival Date	Important Development	Requested by	Value
M00000214	POA Review	Closed		Review		2023-05-15		Adam Christopher	0.00
M00000129	Acquire the company of BLP	Closed	BLP industry	M&A	Carolina Robinson	2022-11-29			0.00
M00000122	Legal opinion for Service Agreement for Jeff	Closed	Jeff Alvah	Legal opinion	Carolina Robinson	2022-11-08			0.00
M00000116	Agreement Drafting	Closed	IDF	Agreement	Alice Jones	2022-10-20	[2022-10-20 08:11:08]:Updates 13452 Updates 1234		0.00
M00000113	Legal opinion for service agreement for BLP	Closed	BLP industry	Legal opinion	Carolina Robinson	2022-09-28			0.00
M00000094	legal advice for Albert	Closed		Civil		2022-08-18		Albert smith	0.00
M00000093	Legal Opinion for QLA	Closed	Quality Level Agency	Commercial	Carolina Robinson	2022-08-17	[2022-08-26 06:51:02]: 111 [2022-09-09...		0.00
M00000078	Legal opinion for Service Agreement	Closed	BTL Insurance	Agreement	Alice Jones	2022-06-07	[2022-06-07 08:49:46]: meeting with BTL...	Elise Khoury	0.00
M00000062	Legal opinion on Purchase Agreement	Closed	Brand Line Company	Labor	Sam Marvin	2022-02-08		John Marvin	0.00
M00000031	Acquisition for Advanced industries by Fred Moriss	Closed	Advanced Industries	Acquisition	Sam Marvin	2021-11-11	[2021-12-09 10:44:33]: Closed and converted to...	Fred Moriss	500.00
M00000003	legal opinion for real estate	Closed	Stones Real Estate	Real Estate	Carolina Robinson	2021-09-27		Caroline Mrawed	1,000.00

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

Thank you!