How to Configure Matter SLA

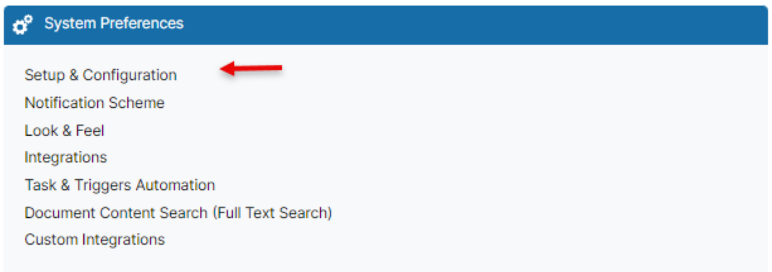
Objectives

- Enable the "SLA Management" feature for Matters
- Configure SLA for Matters/Cases

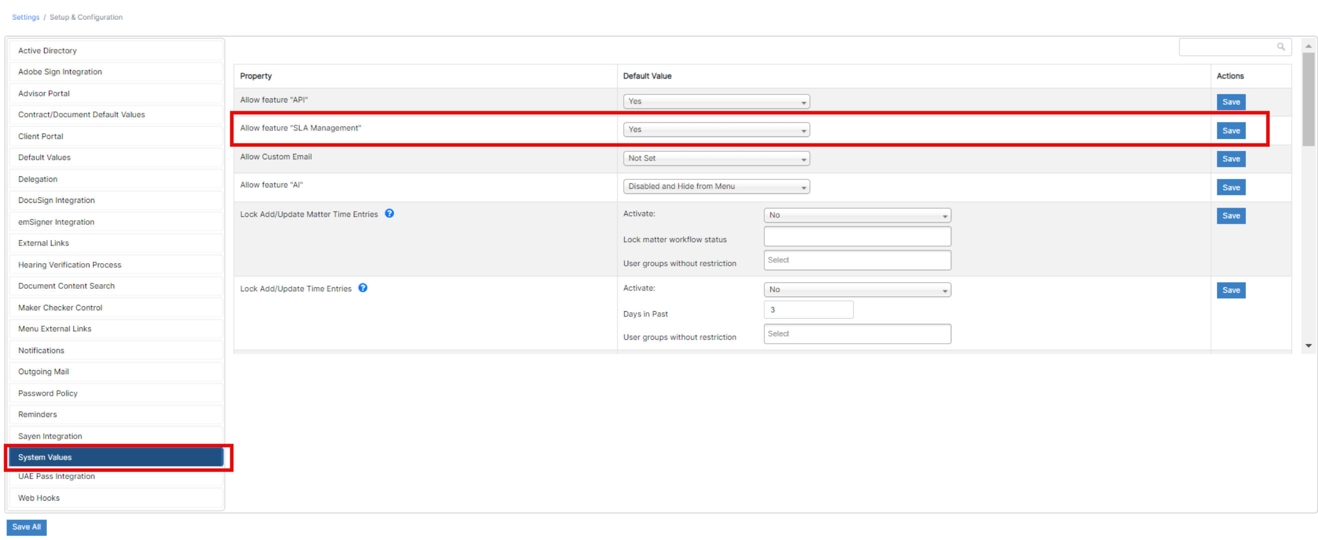
Steps

In LEXZUR, you can define a target time duration for different Matter workflow statuses.

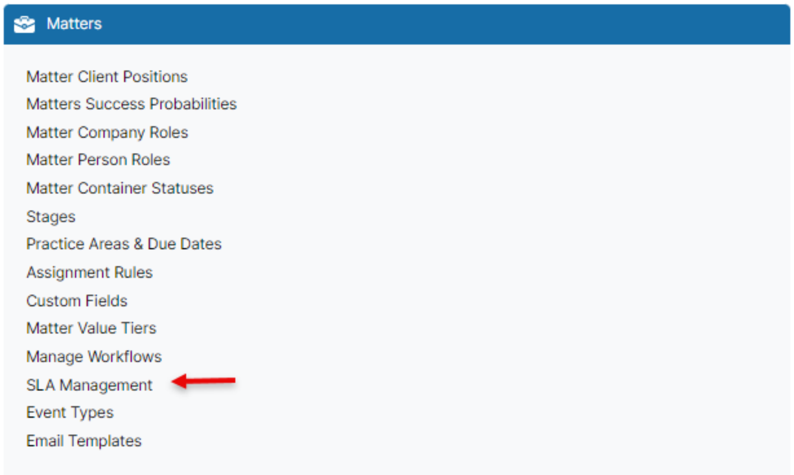
To enable this feature, you have to go to **System Settings** and select **Setup & Configuration** from System Preferences.



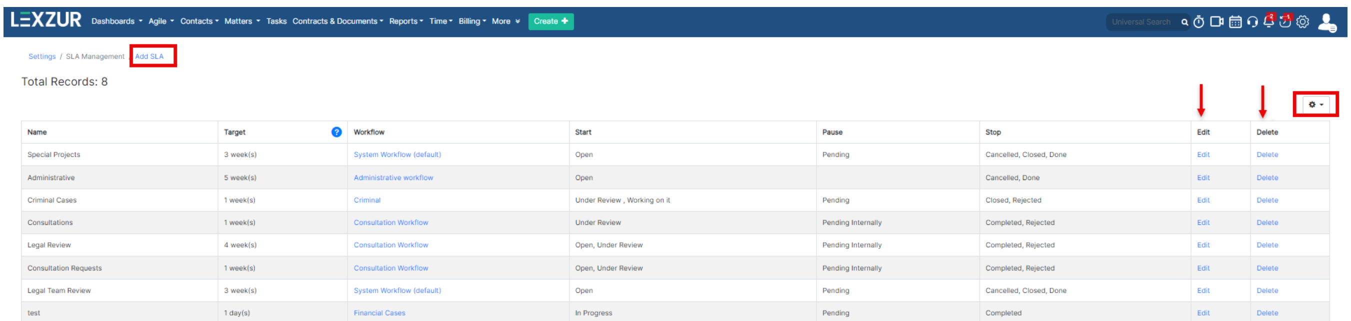
In the **System Values** tab, you have to set the default value of "Allow feature "SLA Management" " to Yes and click on Save.



To manage the matters SLAs, head to the **"Matters"** section **SLA Management**.



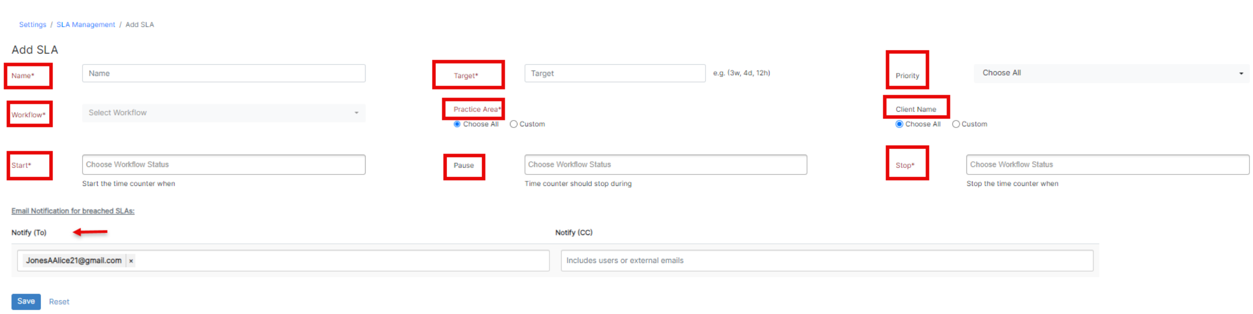
You can add, edit or delete SLAs.



Name	Target	Workflow	Start	Pause	Stop	Edit	Delete
Special Projects	3 week(s)	System Workflow (default)	Open	Pending	Cancelled, Closed, Done	Edit	Delete
Administrative	5 week(s)	Administrative workflow	Open		Cancelled, Done	Edit	Delete
Criminal Cases	1 week(s)	Criminal	Under Review , Working on it	Pending	Closed, Rejected	Edit	Delete
Consultations	1 week(s)	Consultation Workflow	Under Review	Pending Internally	Completed, Rejected	Edit	Delete
Legal Review	4 week(s)	Consultation Workflow	Open, Under Review	Pending Internally	Completed, Rejected	Edit	Delete
Consultation Requests	1 week(s)	Consultation Workflow	Open, Under Review	Pending Internally	Completed, Rejected	Edit	Delete
Legal Team Review	3 week(s)	System Workflow (default)	Open	Pending	Cancelled, Closed, Done	Edit	Delete
test	1 day(s)	Financial Cases	In Progress	Pending	Completed	Edit	Delete

Once adding a new SLA, you have some mandatory fields:

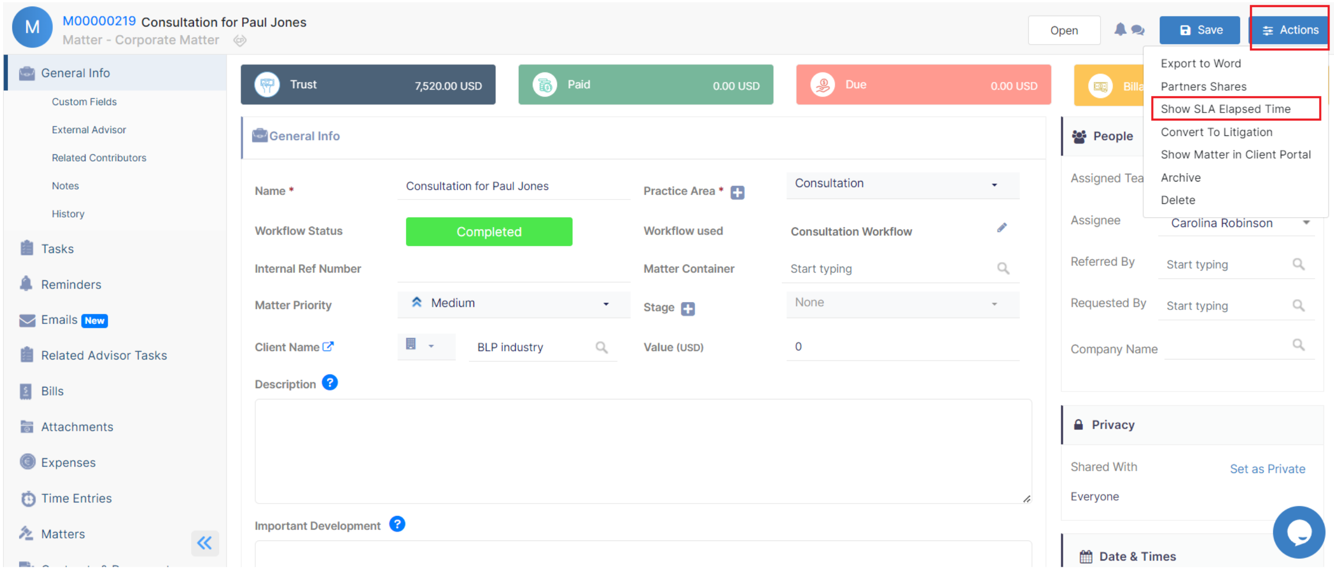
1. SLA name: specify the SLA name
2. Workflow: select the workflow you want to apply to this SLA.
3. Target time: specify the target time such as in weeks, days, or hours.
4. Practice Area: you can enable this SLA to all practice areas or customized ones.
5. Starting Status to start counting the time
6. Status when you want to stop counting.



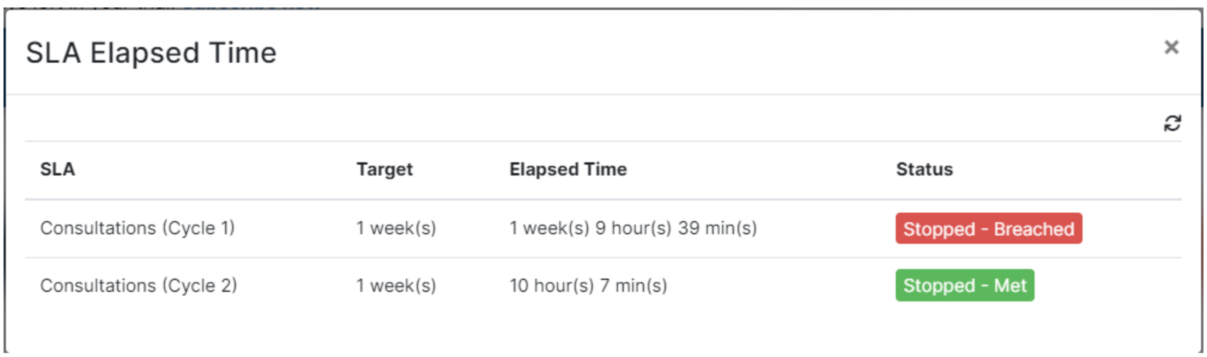
You can also specify the workflow status for the pause counting time, Specify the matter's priority, and customize this SLA to particular clients if needed.

In the Email Notification for breached SLAs section, you can specify the user that will get notified once the SLA is breached.

To view the SLA elapsed time for a specific Matter, head to the matter/case page, and click **"Show SLA elapsed time"** from the Actions button on the top right:

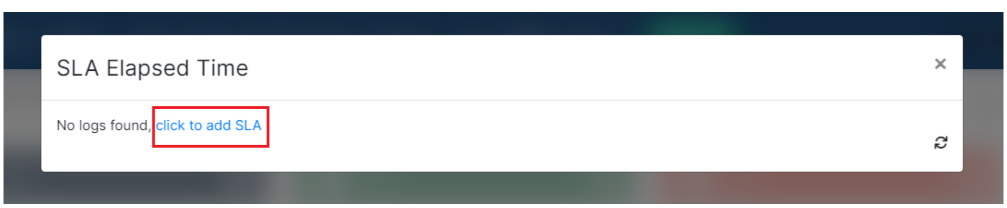


This will show you all the cycles done at the level of this particular matter, with all the details, what was the target, the elapsed time, and if **Met** the target or was **Breached.**


SLA Elapsed Time

SLA	Target	Elapsed Time	Status
Consultations (Cycle 1)	1 week(s)	1 week(s) 9 hour(s) 39 min(s)	Stopped - Breached
Consultations (Cycle 2)	1 week(s)	10 hour(s) 7 min(s)	Stopped - Met

Setting SLAs for matters becomes effortlessly accessible right from the matters page. When you click to display the elapsed time, and in cases where no SLAs were previously defined, you can easily initiate the process by clicking to add a new one.



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

Thank you!