How to Customize Workflows

Objectives

- Add Transitional Workflows

Steps

This guide will cover the configurable items on Workflow transitions from one status to the other.

This will be broken down in terms of Transition Screens, Notifications, and Permissions.

Benefits of setting workflows in place:

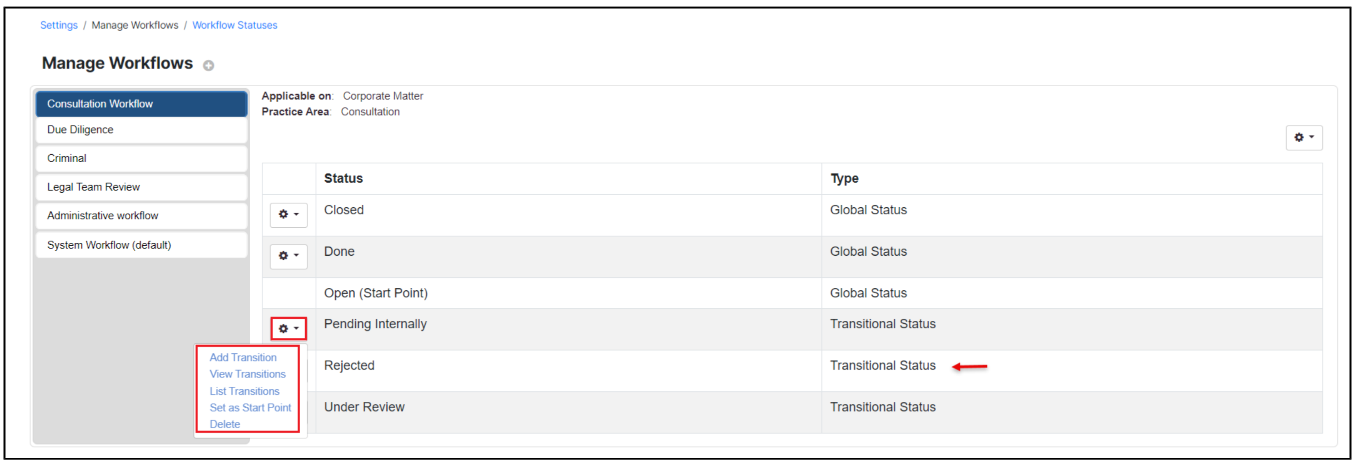
- The legal team, Requesters, and Contributors will be up to date with their Matter/Case statuses.
- Better efficiency in collaboration on the Matters/Cases.
- Management will be updated on how the Matters/Cases are going.
- Ability to generate SLAs and KPI reports.

To do so, go the **System Settings Matters Manage Workflows**

Choose the Workflow you want to use, or create your own.

Learn more about how to add and manage workflows **here.**

Click on the action wheel next to the status you want to start with and add a new transition.

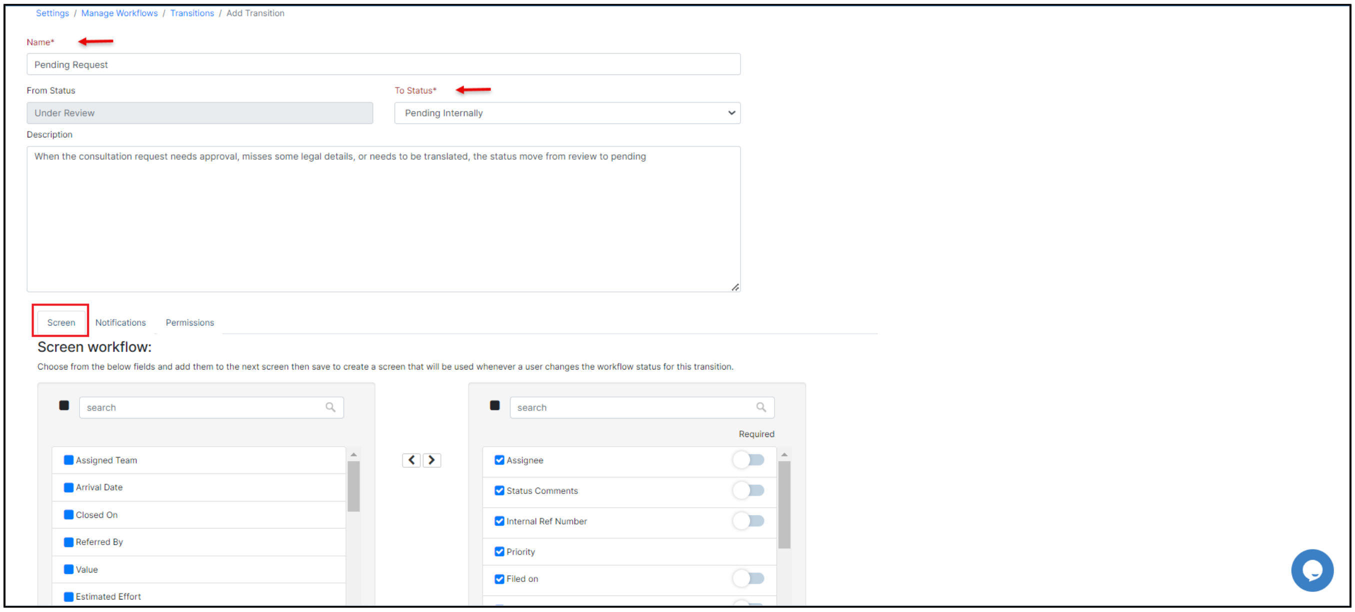


Transitions are the changes that should be done in matter workflows, from one condition or status to another, but this can be managed in a way to keep the process efficient through transitional screens, notifications to the concerned people, and permissions.

To add a new transition give it a name, describe it if needed, and specify the transition from and to status.

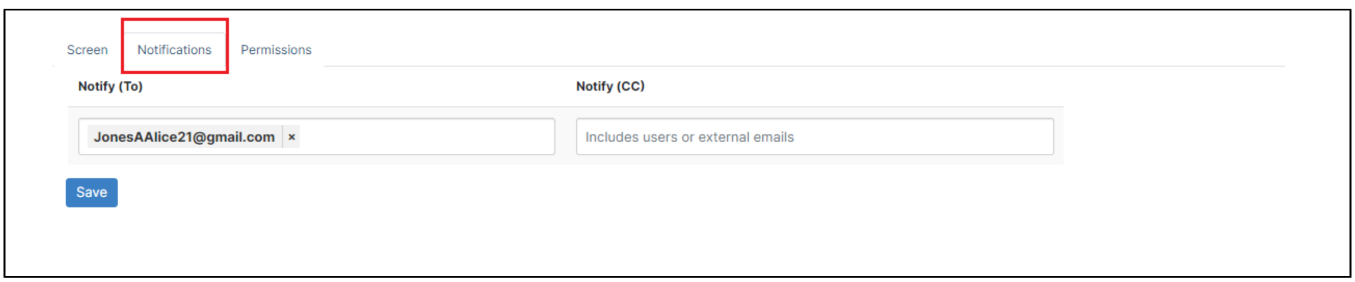
Transition Screens:

On each status transition, we can enable a popup screen that will force the user to fill in certain fields. This is used to protect your data integrity, ensuring that users do not skip or forget to enter data required by our practice.



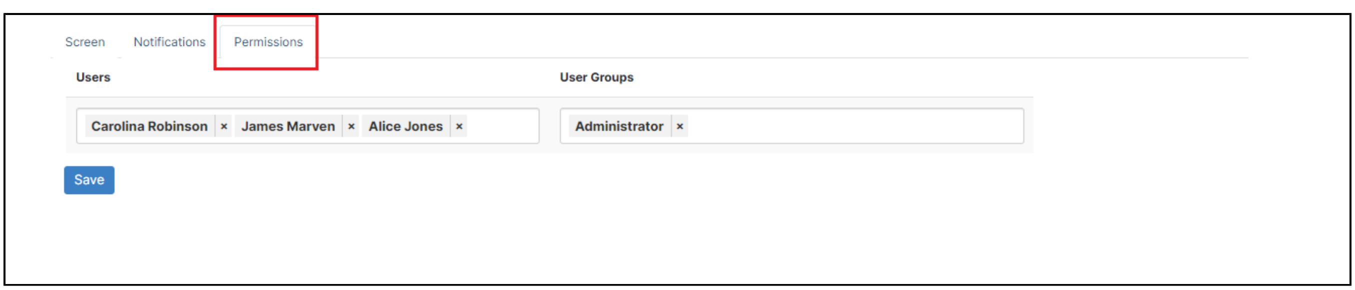
Notifications:

Notifications can be configured to inform the needed parties about changes in the Matter/Case. For example, if at a certain point, a manager needs to be informed that a Matter has passed a particular stage and requires their reviewal or approval, this can be achieved using a workflow.

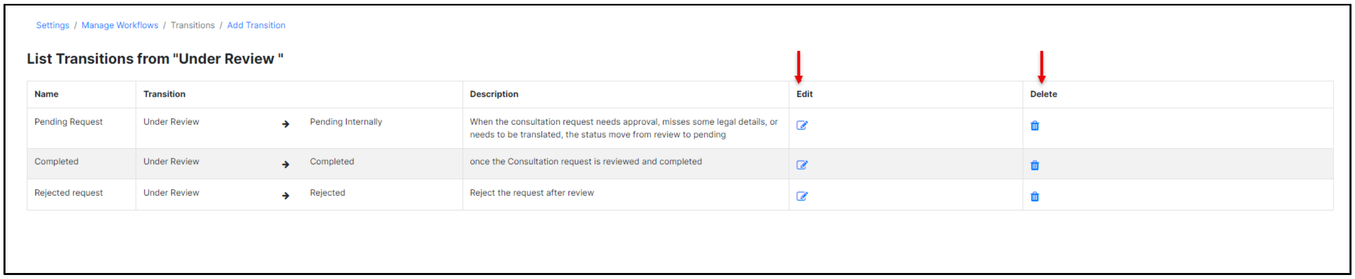


Permissions:

Permissions can be set on each transition; this is used to control who has the ability to make changes in the transitions. It can be utilized to put in place approval/reviewal processes allowing only a specific user(s) to approve or reject a Matter.



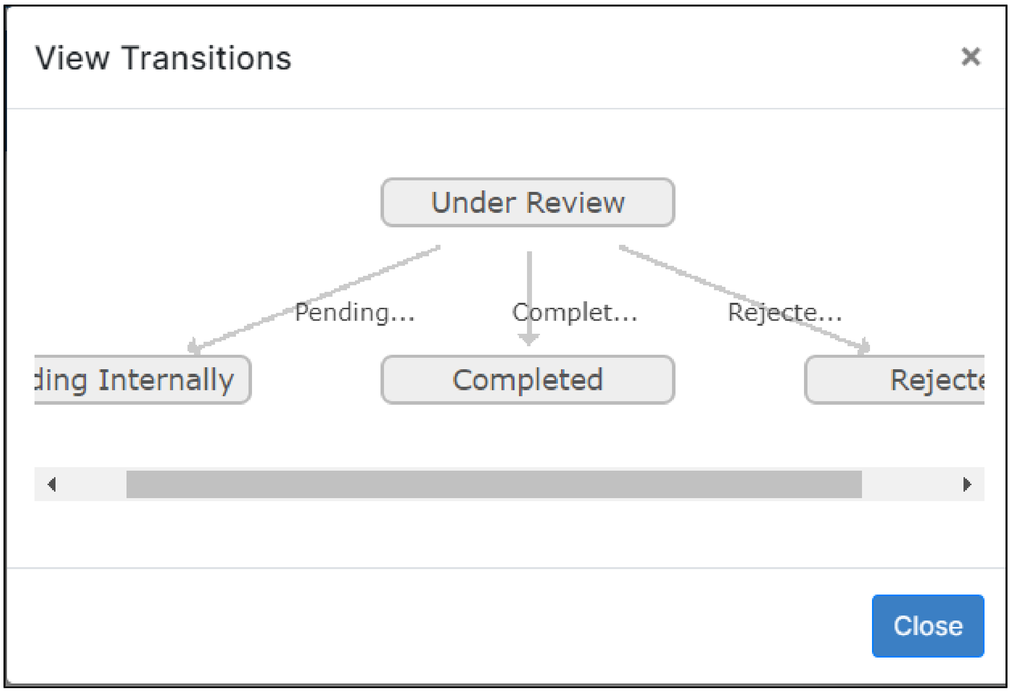
Once created you can then list and view transitions easily from the workflow:



Settings / Manage Workflows / Transitions / Add Transition

List Transitions from "Under Review "

Name	Transition		Description	Edit	Delete
Pending Request	Under Review	Pending Internally	When the consultation request needs approval, misses some legal details, or needs to be translated, the status move from review to pending		
Completed	Under Review	Completed	once the Consultation request is reviewed and completed		
Rejected request	Under Review	Rejected	Reject the request after review		



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

Thank you!