

How to Manage Matter Workflows

Objectives

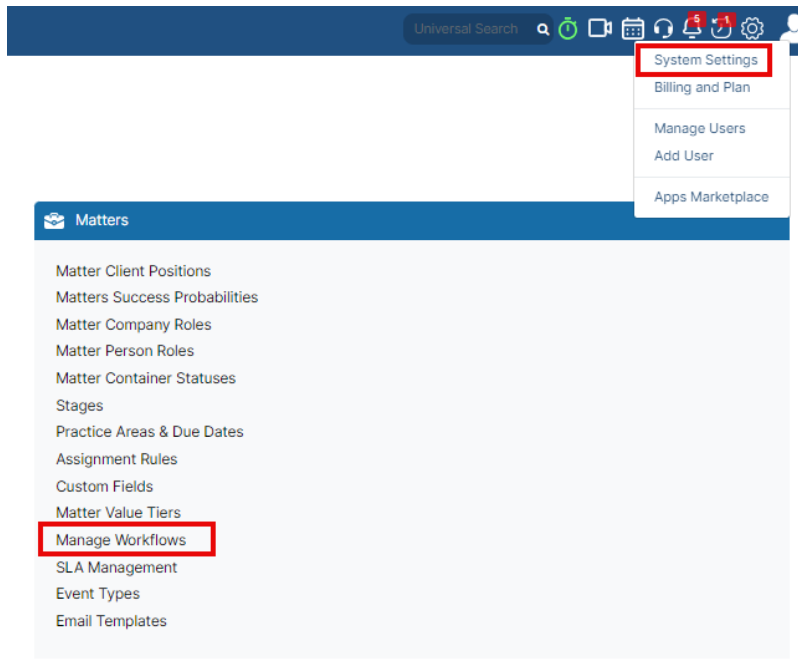
- [Add Workflows](#)
- [Add Workflow Statuses](#)
- [Manage Workflows](#)

Steps

In LEXZUR, you can customize matter workflows to replicate the legal processes in your office

Add Workflow:

First, go to the **System Settings**, then **Manage Workflows** under the Matters settings.



From this page, you will be able to manage and add your workflows.



A default workflow (System Workflow) is used when no workflows are selected.

[Settings](#) / [Manage Workflows](#) / [Workflow Statuses](#)

Manage Workflows

Due Diligence

Criminal


Legal Team Review

Administrative workflow

System Workflow (default)


Applicable on: Litigation Case, Corporate Matter

Practice Area: Acquisition, Agreement, Arbitration, Audit, Banking, Banking & finance, Collection, Commercial, Constitutional Court




1-Review (Start Point)

Transitional Status




2-In Progress

Transitional Status




3-Closed

Transitional Status



Rejected

Transitional Status




[Edit Workflow](#)
[Delete Workflow](#)
[Add Workflow Status](#)
[List Transitions](#)
[Export to Excel](#)


The actions wheel on the top right allows you to edit a workflow, delete it, add statuses, list transitions, or export to Excel.

To add a new Workflow, click on the **(+)** sign next to the Manage Workflows



You must specify the Workflow **name**, and if it is applicable to Corporate Matters, Litigation Cases, or both, and the **practice areas** as well.

Add new workflow 



Name*

Consultation Workflow 

Applicable on*

Corporate Matter  

Practice Area*

Consultation  

Save

Cancel

Add Workflow Statuses:

Once the new Workflow is added, you must now assign statuses to it. Therefore, **click to add** statuses

[Settings](#) / [Manage Workflows](#) / [Workflow Statuses](#)

Manage Workflows

Consultation Workflow

Due Diligence

Criminal


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Administrative workflow

System Workflow (default)

Applicable on: Corporate Matter

Practice Area: Consultation



There are no statuses assigned to this workflow. [Click to Add](#)

Choose from the list of predefined statuses or add new ones on the fly.

Add Workflow Status

Name*

1-Review

+

Save
Cancel

Adding a new status requires specifying some details such as its **name**, **category**, and **type**.

⚠ Statuses should be nested under one of the four main categories: Open, In Progress, Done, and Cancelled.

Add Status

Name*

Name

Category*

Open

☐ Global

Save
Cancel

Statuses could also be **Global** or **Transitional**. By default, all the added statuses will be Transitional unless you check the Global type.

⚠ Transitional statuses allow you to customize your workflow based on different transitional steps including transition screens, notifications, and permissions.

Additionally, all workflow statuses will be listed on a separate page, that could be accessed from the **Workflow Statuses** hyperlink on the top of the page.

Here you can also add new statuses, edit, or delete the existing ones, and track all the statuses with their type and categories.

Settings / Manage Workflows / Workflow Statuses / Add

Total Records: 14

Status	Type	Category	Actions
1-Review	Transitional Status	open	Edit Delete
2-In Progress	Transitional Status	in progress	Edit Delete
3-Closed	Transitional Status	done	Edit Delete
Cancelled	Global Status	cancelled	Edit Delete
Closed	Global Status	done	Edit Delete
Done	Global Status	done	Edit Delete
In Progress	Global Status	in progress	Edit Delete
Open	Global Status	open	Edit Delete
Pending	Global Status	in progress	Edit Delete
Question creation	Transitional Status	open	Edit Delete
Rejected	Transitional Status	cancelled	Edit Delete
Review	Global Status	open	Edit Delete
Under Review	Transitional Status	open	Edit Delete
Working on it	Transitional Status	in progress	Edit Delete

Manage Workflows:

Once adding the new Workflow, you can now manage and customize it.

Settings / Manage Workflows / Workflow Statuses

Manage Workflows

Consultation Workflow

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Administrative workflow

System Workflow (default)

Set as Start Point

Delete

Applicable on: Corporate Matter

Practice Area: Consultation

Status	Type
<div>⚙️</div> Closed	Global Status
Done	Global Status
Open (Start Point)	Global Status
<div>⚙️</div> Pending Internally	Transitional Status
<div>⚙️</div> Rejected	Transitional Status
<div>⚙️</div> Under Review	Transitional Status

Therefore, specify the starting point status, Add new transitions between the transitional statuses, list transitions, and so on.

⚠️

Start Point Status, is the first workflow status of the matter or the case once created.

Settings / Manage Workflows / Workflow Statuses

Manage Workflows

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Administrative workflow

System Workflow (default)

Add Transition

View Transitions

List Transitions

Set as Start Point

Delete

Applicable on: Corporate Matter

Practice Area: Consultation

Status	Type
<div>⚙️</div> Closed	Global Status
<div>⚙️</div> Done	Global Status
Open (Start Point)	Global Status
<div>⚙️</div> Pending Internally	Transitional Status
Rejected	Transitional Status
Under Review	Transitional Status

✔️

Learn more about Transitional Workflows, and how to customize your workflow [here](#).

The workflows will then be automatically assigned in matters/cases when they match the criteria of the workflow.

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

Thank you!