Matters Table

The Matters table holds records for each matter being managed by the system. The type of matter, and how it is assigned, is defined in the Matter Types table. Default matter types are items such as Litigation Case, Patent Application, Trademark Application, Regulatory Filing, Confidential HR Matter, and Corporate Transaction / Merger or Acquisition.

Matter records are used to manage work being done by outside counsel, internal legal projects, or a combination of the two. They have an Assigned Team and a Matter Owner who belongs to that team. They also can have multiple files and deadlines associated with them. Time can be entered against them and reported on via the Time Entries table, non-legal users can gain access and be CC'd about them, and external legal firms and consultants can be identified and CC'd on emails sent about them.

Use Case

Matter records can be created by members of the Legal group only. They can be created from a button in a Legal Request or by going to the table and clicking New.

The values in the Matter Type drop-down list is drawn from the Matter Types table, and includes values that have been defined for use in the Matters table. The Confidential HR Matter value controls the values in the Confidential field.

Depending on the Matter Type, some additional fields are visible. For instance, a Corporate Transaction matter has a tab for Related Contracts where multiple contracts can be selected and linked to the matter.

Matter Record Tabs

Use this section to learn more about the tabs of Matter records and the fields and functions present on them.

Matter Details Tab

The main fields of the Matter record are found on the Matter Details tab. These fields are:

- Matter Type
- Matter Name: a brief description of the matter.

- Matter Assigned Team: this is set by default based on the Matter Type.
- Matter Owner: the options of this field are filtered to people on the assigned team.
- Matter Number: this value is set by default to the ID of the record and can be be modified by a user if needed.
- Confidential: a yes/no field that affects who can view the matter.
- Description: a text field describing the matter in significant detail.
- Related to Internal Entities: an optional multivalue field that determines if the matter should be linked to specific entities.
- Next Reminder Date: an optional field that uses a time-based rule to notify the Matter Owner on that date. This time-based rule is disabled by default.
- Visible to These Users: other than the legal team, only people specifically listed in this field can view the matter.
- Matter CC's: internal people who can be notified by email about changes related to the matter.
- Involves Outside Firms/People: a yes/no field used to identify outside law firms or companies involved in the matter, if yes is selected, then additional fields become visible called Primary Law Firm, Additional External Law Firms, and External Contacts:

  - A Primary Law Firm, as well as Additional External Law Firms, can be selected. The filter on these fields limits the choices to companies whose roles contain Supplier and whose Goods and Services include Consulting: Legal.
  - External Contacts lists people at the primary law firm or additional law firms.

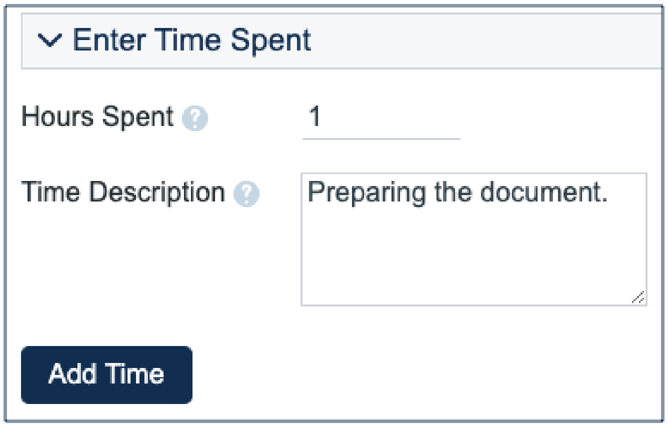
Files and Deadlines Tab

The Files and Deadlines tab allows files to be uploaded, managed, and viewed. Files can be converted from Word to PDF and vice versa. It also allows deadlines to be created and managed.

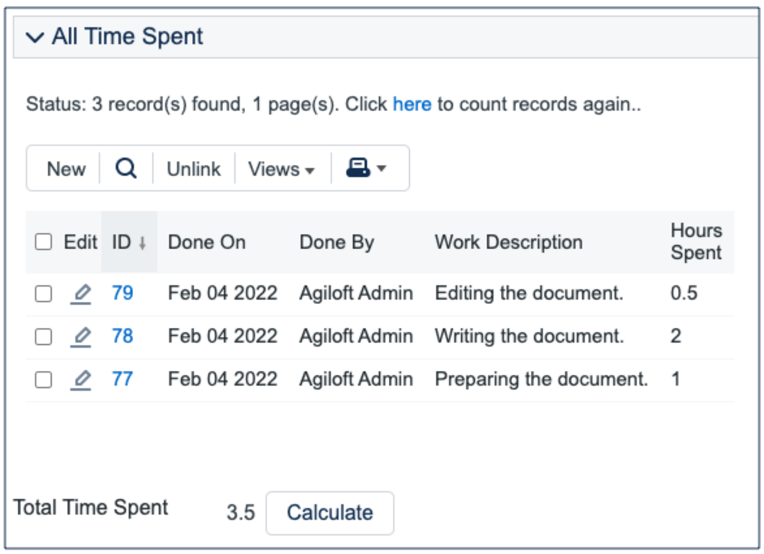
If multiple deadlines are created, the next one is automatically updated based on date, and reminders can be sent to the responsible person or anyone related to the matter.

Time Entry Tab

Time entries can be created for Matter records on the Time Entry tab.



You can then view all time entries in the All Time Spent linked table.



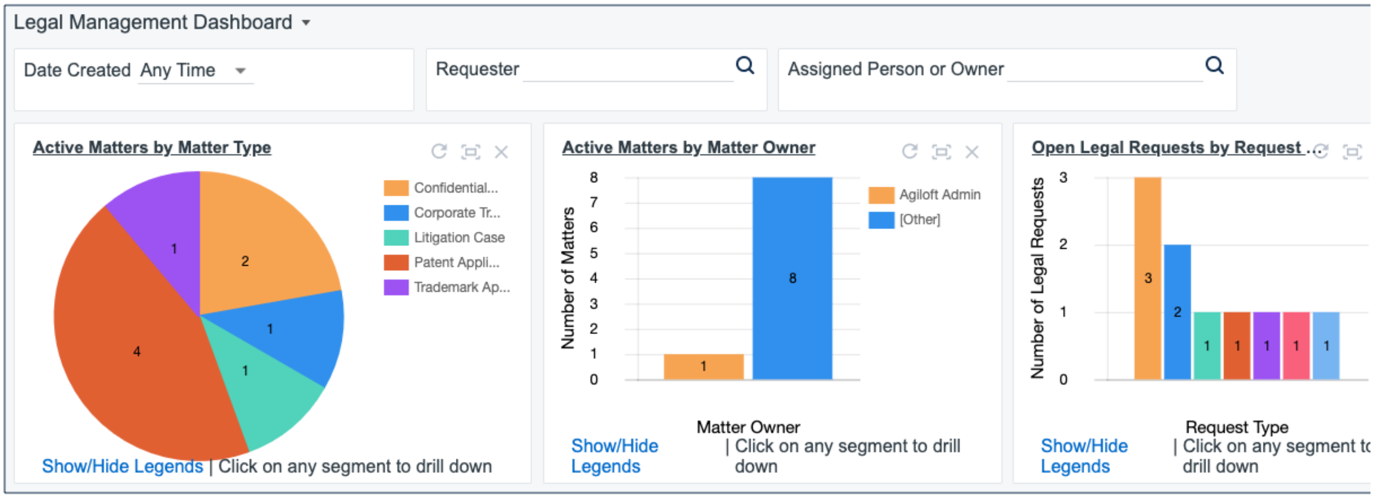
You can run reports on the Time Entry table to show all the user's time entries for the current month and for the last 12 months.

Email Notifications

When a new Matter record is created, the requester and CCs are notified of the new matter. When created, if no person is assigned as the Matter Owner, then the default Matter Team is assigned and notified based on the Matter Type. If a person is assigned by someone other than the Matter Owner, that person is emailed about the new assignment. If the Next reminder date is today, the Matter Owner is emailed the reminder.

Charts and Reports and Dashboard

Reports for the Matters table have been added to the Legal Manager Home Page Dashboard.



Legal Management Dashboard
Date Created Any Time
Requester
Assigned Person or Owner
Active Matters by Matter Type
Confidential...
Corporate Tr...
Litigation Case
Patent Appli...
Trademark Ap...
2
1
1
4
1
Show/Hide Legends | Click on any segment to drill down
Active Matters by Matter Owner
Number of Matters
8
7
6
5
4
3
2
1
0
Agiloft Admin
[Other]
Matter Owner
Show/Hide Legends | Click on any segment to drill down
Open Legal Requests by Request ...
Number of Legal Requests
3
2
1
0
Request Type
Show/Hide Legends | Click on any segment to drill down