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LexMundi
Equisphere

Knowledge Packs for
More Successful Matter Outcomes

Matter
Management Module

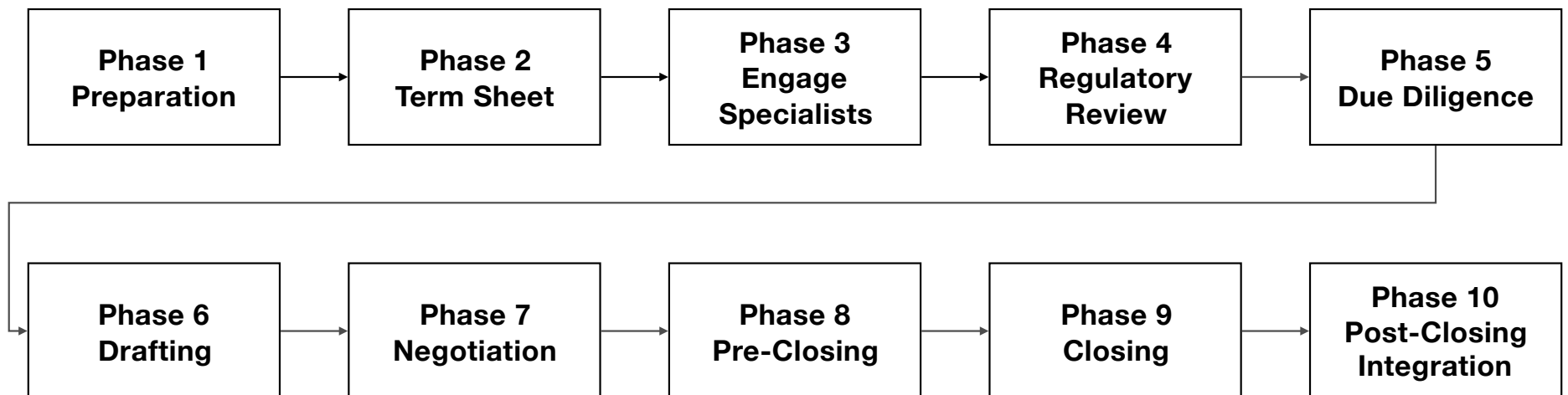
LexMundi
World Ready

MATTER-MANAGEMENT BOARDS

What are they and how can they help me better manage my work?

**Video 8: Using a Board to Manage
WIP of a Practice Group**

Phases of an M&A Transaction



Work in Progress

M&A
WIP

NOT STARTED	PHASE 1 PREPARATION	PHASE 2 TERM SHEET	PHASE 3 ENGAGE SPECIALISTS	PHASE 4 REGULATORY REVIEW	PHASE 5 DUE DILIGENCE	PHASE 6 DRAFTING	PHASE 7 NEGOCIATION	PHASE 8 PRE-CLOSING	PHASE 9 CLOSING	PHASE 10 CLOSED
<p>PROJECT APPLE PEAR LLC CLOSING: MAY 24 PARTNER TWO</p>		<p>PROJECT IMAGE LEIKA PTY CLOSING: MAY 15 PARTNER TWO</p>	<p>PROJECT ALPINE RCL LTD CLOSING: MAY 10 JENNIFER PARTNER</p>		<p>PROJECT FLIGHT WRIGHT BROS. LTD CLOSING: MAY 15 PARTNER TWO</p>	<p>PROJECT FOX OVAL CORP. CLOSING: APRIL 26 PARTNER TWO</p> <p>PROJECT PINK KDSR LTD. CLOSING: APR. 29 PARTNER ONE</p>	<p>PROJECT OMEGA YORK INC. CLOSING: APR 17 JENNIFER PARTNER</p> <p>PROJECT ZOO ELEPHANT EQUITIES CLOSING: APR 19 PARTNER ONE</p> <p>PROJECT CHICKENS WINGS LTD. CLOSING: APR 19 PARTNER TWO</p>	<p>PROJECT GATO MIMI CORP CLOSING: APR 12 JENNIFER PARTNER</p>		

What Information to Capture

- Project name
- Client
- Closing date
- Supervising Partner
- What else?

PHASE 5 DUE DILIGENCE	PHASE 6 DRAFTING	PHASE 7 NEGOCIATION	PHASE PRE-CLO
PROJECT FLIGHT WRIGHT BROS. LTD CLOSING: MAY 15 PARTNER TWO	PROJECT FORD ORAL CORP. CLOSING: APRIL 26 PARTNER TWO	PROJECT OMEGA YORK INC CLOSING: APR. 17 JENNIFER PARTNER	PROJECT MIMI C CLOSING: A JENNIFER
	PROJECT PINK KDSR LTD. CLOSING: APR. 29 PARTNER ONE	PROJECT ZOO ELEPHANT EQUITIES CLOSING: APR 19 PARTNER ONE	
		PROJECT CHICKENS WINGS LTD. CLOSING: APR 19 PARTNER TWO	

HighQ's Knowledge Base



Home Knowledge Base

www.kb-collaborate.highq.com/home

Search

Home

User Guide

- Getting Started
- Home
- Files
- Tasks
- Wiki
- Events
- Blog
- iSheets
- Workflow
- Miscellaneous
- Changing system languages

HighQ Collaborate Knowledge Base

Welcome to the Collaborate Knowledge Base. This Knowledge Base includes documentation for end users and administrators, from first login to system management. Some of the most useful articles are listed below. Use the expandable table of contents on the left to navigate through all of the articles, or use the search box on the top right to find particular articles. If you have any queries or feedback please send them to techauthors@highq.com



Getting Started

- Activating an Account and Logging in
- User Profile
- Using the Dashboard
- Subscribing to Email Alerts
- Changing a Password



User Guides

- Files Overview
- Search Overview
- Using Tasks
- Events
- iSheets Reference Guide
- Blogs



Files



Managing Users and Groups

WIP - The Digital Version

The image displays a digital Kanban board with four columns representing project phases. Each column contains task cards for different projects. The cards include project names, due dates, and status indicators (colored boxes with letters). A blue 'Add task' button is visible at the bottom of each column.

Phase	Project Name	Due Date	Status Indicators	Current Phase
Phase 5: Due Diligence	Project Flight: Wright Brothers Ltd.	Due on 15 May 2019	PT, AO, PP, DT	In Phase 5
Phase 6: Drafting	Project Ford: Opal Corp.	Due on 26 Apr 2019	PT, AT, PS, DD	In Phase 6
Phase 6: Drafting	Project Pink - KDSR Ltd.	Due on 29 Apr 2019	PO, AO, PF, DO	In Phase 6
Phase 7: Negotiation	Project Omega: Yolk Inc.	Due on 17 Apr 2019	JP, AA, PP, DD	In Phase 7
Phase 7: Negotiation	Project Zoo: Elephant Equities	Due on 19 Apr 2019	PO, AO, PF, DO	In Phase 7
Phase 7: Negotiation	Project Chicken: Wings Ltd.	Due on 19 Apr 2019	PT, AA, PP, DO	In Phase 7
Phase 8: Pre-closure	Project Gato:	Due on 12 Apr 2019	JP, AT, P	In Phase 8

Who's Working on What?

The dashboard is organized into four vertical columns representing different project phases:

- Phase 5: Due Diligence**
 - Project Flight: Wright Brothers Ltd. (Due on 15 May 2019) - In Phase 5. Icons: PT, AO, PP, DT.
- Phase 6: Drafting**
 - Project Ford: Opal Corp. (Due on 26 Apr 2019) - In Phase 6. Icons: PT, AT, PS, DD.
 - Project Pink - KDSR Ltd. (Due on 29 Apr 2019) - In Phase 6. Icons: PO, AO, PF, DO. (Circled in red)
- Phase 7: Negotiation**
 - Project Omega: Yolk Inc. (Due on 19 Apr 2019) - In Phase 7. Icons: JP, AA, PP, DD. (Circled in red, with tooltip for Jennifer Partner)
 - Project Zoo: Elephant Equities (Due on 19 Apr 2019) - In Phase 7. Icons: PO, AO, PF, DO.
 - Project Chicken: Wings Ltd. (Due on 19 Apr 2019) - In Phase 7. Icons: PT, AA, PP, DO.
- Phase 8: Pre-closing**
 - Project Gato: M... (Due on 12 Apr 2019) - In Phase 8. Icons: JP, AT, P...

WIP - The Digital Version

The screenshot displays a digital work-in-progress (WIP) interface with four columns representing different project phases:

- Phase 5: Due Diligence**: Shows "Project Flight: Wright Brothers Ltd." due on 15 May 2019, with tags PT, AO, PP, DT.
- Phase 6: Drafting**: Shows "Project Ford: Opal Corp." due on 26 Apr 2019 (tags PT, AT, PS, DD) and "Project Pink - KDSR Ltd." due on 29 Apr 2019 (tags PO, AO, PF, DO).
- Phase 7: Negotiation**: Shows "Project Omega: Yolk Inc." with a contact card for Alicia Associate (tags AA, PP, DD) and "Project Chicken: Wings Ltd." due on 19 Apr 2019 (tags PT, AA, PP, DO).
- Phase 8: Project Closeout**: Shows "Project G..." due on 12 Apr 2019 (tags JP, AT).

A contact card for **Alicia Associate** is highlighted with a red circle. The card displays the firm name "firmllp," the email address "AliciaAssociate@firmllp.com," and a "Send a message" button. Red arrows indicate the flow of interaction: from the "Add task" button in Phase 5 to the "Project Pink" task in Phase 6, from the "Project Omega" task in Phase 7 to the contact card, and from the contact card to the "Send a message" button.

Matter Card Details

The screenshot displays a task management interface with a modal window titled "Task details" for "Project Pink - KDSR Ltd.". The modal contains the following information:

- Title:** Project Pink - KDSR Ltd.
- Status:** Phase 6: Drafting
- Start date:** 14 Feb 2019
- Due date:** 29 Apr 2019
- Assignee(s):** Partner One, Associate One and 2 more
- Priority:** Normal
- List:** Phase 6
- Created by:** David Skinner, 05 Apr 2019 22:50
- Updated by:** David Skinner, 07 Apr 2019 16:55
- Description:** Acquisition of GD Corp.

The background interface shows a list of tasks under "Phase 5: Due Diligence", including "Project Flight: Wright Brothers Ltd." and "Omega: York Inc.". The "Add task" button is visible at the bottom of the task list.

Card View

The image displays a Kanban board with four columns representing different project phases. Each column contains one or more project cards. Each card includes the project name, due date, a set of four colored status tags, and the current phase. Below each card is a small input field with a star icon and a menu icon. A blue 'Add task' button is located at the bottom of each column.

Phase	Project Name	Due Date	Status Tags	Current Phase
Phase 5: Due Diligence	Project Flight: Wright Brothers Ltd.	Due on 15 May 2019	PT, AO, PP, DT	In Phase 5
Phase 6: Drafting	Project Ford: Opal Corp.	Due on 26 Apr 2019	PT, AT, PS, DD	In Phase 6
Phase 6: Drafting	Project Pink - KDSR Ltd.	Due on 29 Apr 2019	PO, AO, PF, DO	In Phase 6
Phase 7: Negotiation	Project Omega: Yolk Inc.	Due on 17 Apr 2019	JP, AA, PP, DD	In Phase 7
Phase 7: Negotiation	Project Zoo: Elephant Equities	Due on 19 Apr 2019	PO, AO, PF, DO	In Phase 7
Phase 7: Negotiation	Project Chicken: Wings Ltd.	Due on 19 Apr 2019	PT, AA, PP, DO	In Phase 7
Phase 8: Pre-closing	Project Gato: ...	Due on 12 Apr 20...	JP, AT, P...	In Phase 8

Timeline View

Add **View** **Group**

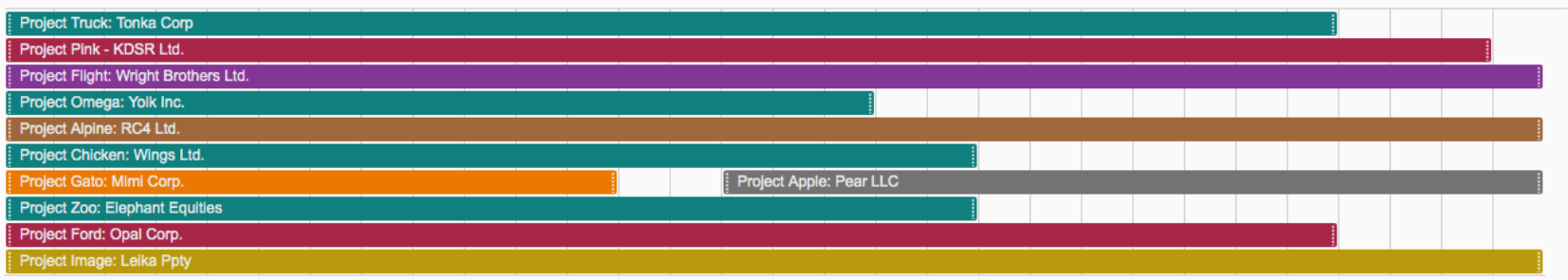
Search and filter tasks

All tasks Assigned to me Created by me Favourites

1 Apr 2019 - 30 Apr 2019

Today **Week** 2 Weeks Month

Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30



List View

Add View Group

Search and filter tasks

All tasks Assigned to me Created by me Favourites

Title	Start date	Due date	List	Priority	Status	Assignee
<input type="checkbox"/> Project Truck: Tonka Corp	01 Feb 2019	26 Apr 2019	Phase 7	Normal	Phase 7: Negotiation	Jennifer Partner, Alicia Associate and 2 more
<input type="checkbox"/> Project Pink - KDSR Ltd.	14 Feb 2019	29 Apr 2019	Phase 6	Normal	Phase 6: Drafting	Partner One, Associate One and 2 more
<input type="checkbox"/> Project Flight: Wright Brothers Ltd.	25 Feb 2019	15 May 2019	Phase 5	Normal	Phase 5: Due Dillige...	Partner Two, Associate One and 2 more
<input type="checkbox"/> ! Project Omega: Yolk Inc.	01 Mar 2019	17 Apr 2019	Phase 7	High	Phase 7: Negotiation	Jennifer Partner, Alicia Associate and 2 more
<input type="checkbox"/> ! Project Chicken: Wings Ltd.	11 Mar 2019	19 Apr 2019	Phase 7	High	Phase 7: Negotiation	Partner Two, Alicia Associate and 2 more
<input type="checkbox"/> Project Alpine: RC4 Ltd.	11 Mar 2019	10 May 2019	Phase 3	Normal	Phase 3: Engage Sp...	Jennifer Partner, Associate Two and 2 more
<input type="checkbox"/> ! Project Gato: Mimi Corp.	15 Mar 2019	12 Apr 2019	Phase 8	High	Phase 8: Pre-closing	Jennifer Partner, Associate Two and 2 more
<input type="checkbox"/> Project Ford: Opal Corp.	18 Mar 2019	26 Apr 2019	Phase 6	Normal	Phase 6: Drafting	Partner Two, Associate Two and 2 more

Gimbal

gimbalcanada.com
+1.514.667.2288



david@gimbalcanada.com
karen@gimbalcanada.com