

Case Report Function

1. Access Case List from the Mattersmith Dashboard and select the required Case. To create a report the status must be Completed or Signed, this will turn the Report button blue. Click on the Report button.

The screenshot shows the Mattersmith dashboard interface. On the left is a navigation menu with options like Dashboard, Organization, Users, Case, Knowledge, My Playbook, Precedents, and Doc Analyser. The main area displays case details for 'Test Penelope Uk Missing Case' and a table of documents. The table has columns for Document Name, Priority, Status, Receiving Date, Delivery Date, Completed, Parties, Messages, Alert, Review, Reporting, and Action. A red box highlights the 'Reporting' column, and a red arrow points to the 'Report' button in the 'Reporting' column of the second row.

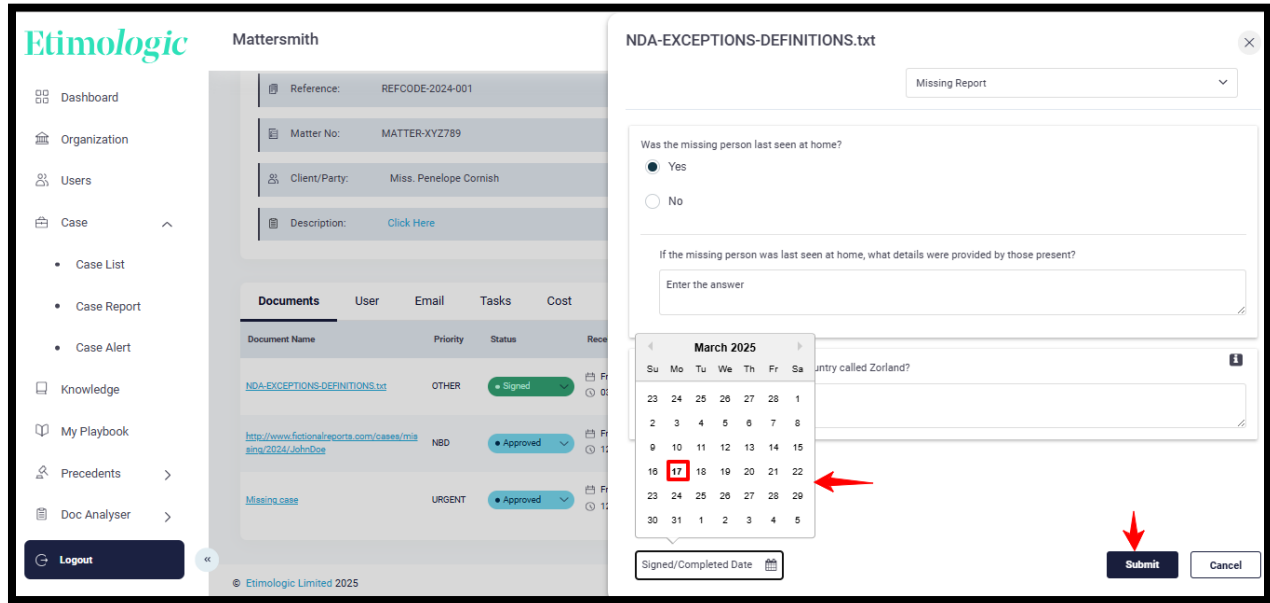
Document Name	Priority	Status	Receiving Date	Delivery Date	Completed	Parties	Messages	Alert	Review	Reporting	Action
NDA-EXCEPTIONS-DEFINITIONS.txt	OTHER	Signed	Fri, Oct 11, 2024 09:28:37 PM	Fri, Oct 11, 2024 11:28:37 PM						Reported	...
http://www.fantasticgranite.com/cases/mis.../2024/JobDoc	NBD	Approved	Fri, Oct 11, 2024 12:10:50 PM	Tue, Oct 15, 2024 12:00:01 AM						Report	...
Misson case	URGENT	Approved	Fri, Oct 11, 2024 12:05:04 PM	Fri, Oct 11, 2024 03:05:04 PM						Report	...

2. The Report function will open in a pop-up box. Select the required report from the drop-down menu.

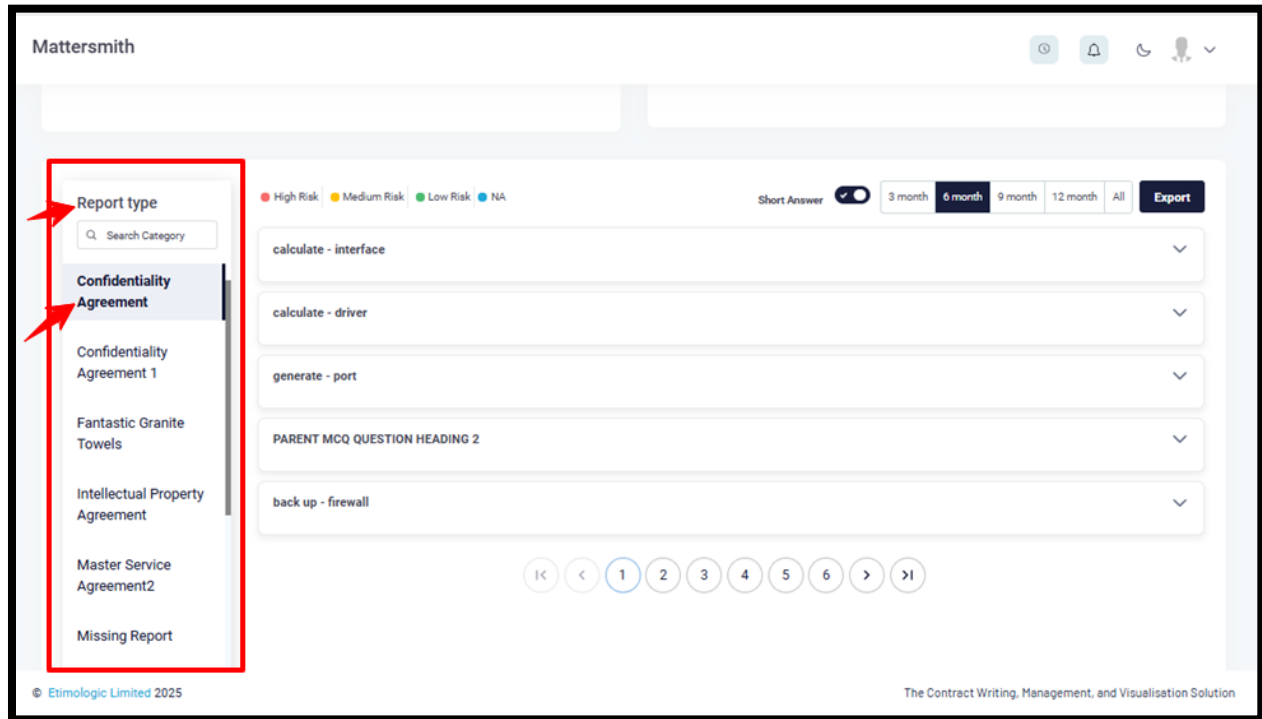
The screenshot shows a pop-up window titled 'Missing case'. It features a 'Select Report Type' dropdown menu. Below the dropdown is a search bar and a list of report types with checkboxes:

- Confidentiality Agreement
- Confidentiality Agreement 1
- Fantastic Granite Towels
- Intellectual Property Agreement

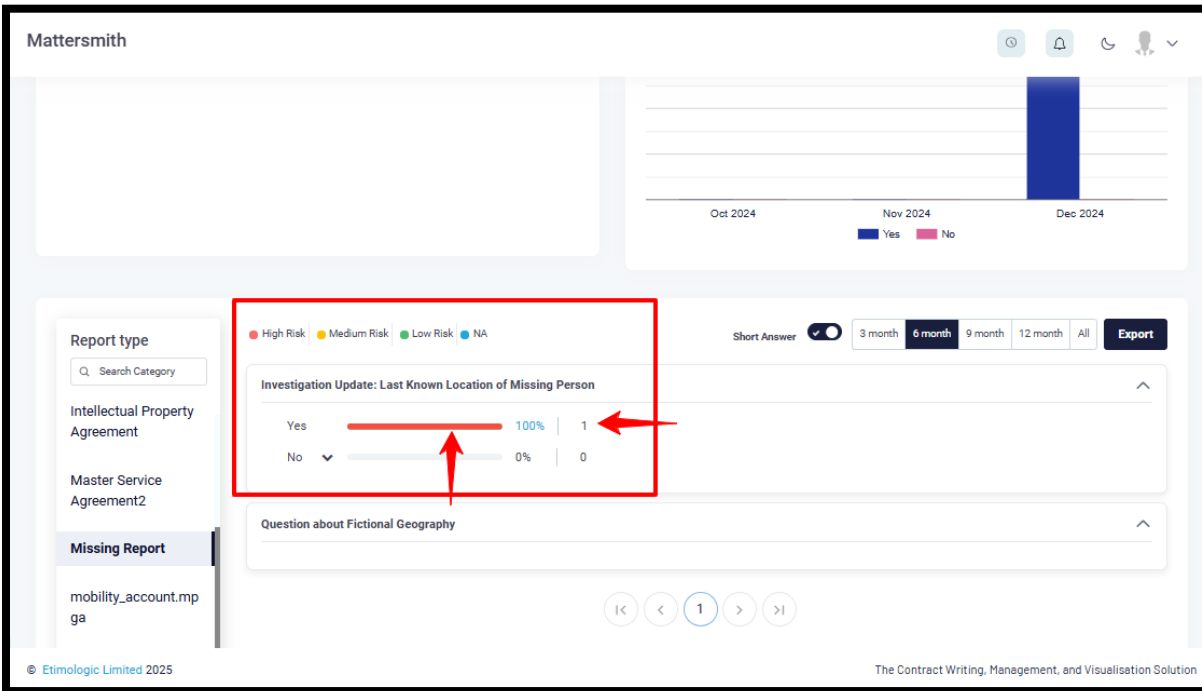
3. Complete the selected report questions, identify the completed or signed date as appropriate, and click the submit button.



4. Navigate to Dashboard. The dashboard will update automatically. From the Management Dashboard select the document type from the list available.



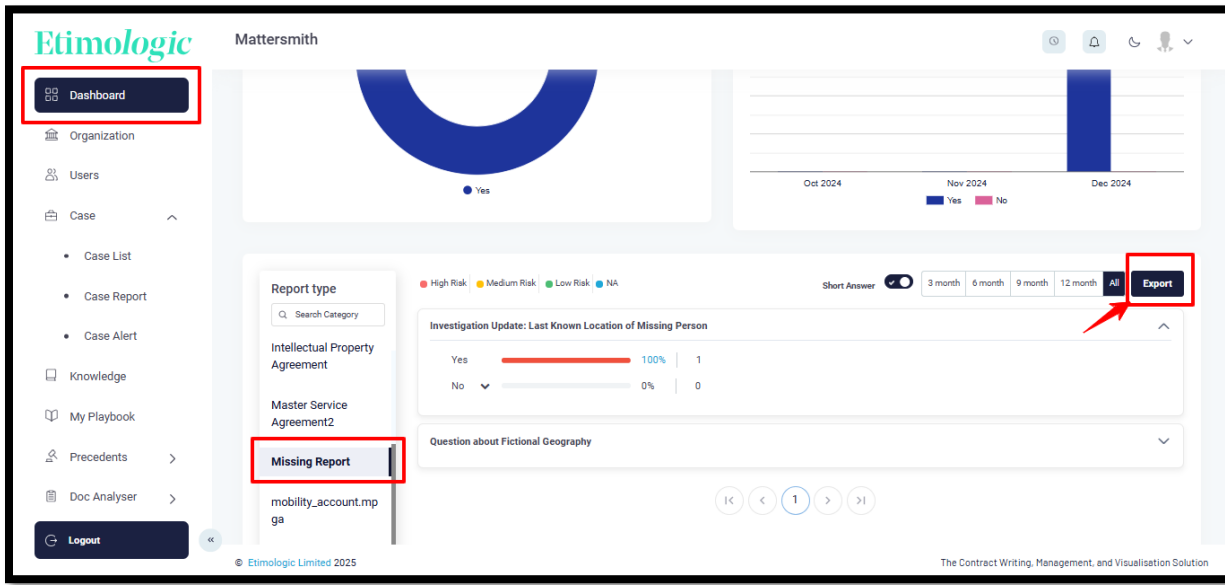
5. Once a question is selected, the results will populate the graph. You can select different periods using the drop-down menus. The percentages of the clause or provision within the sample is shown in blue and the number of documents covered by the report in black. Risk indicators are identified by colour code. By clicking on the percentage slider, you can access the Cases relating to these results for which you have been given permission.



6. You can access the documents within the permissioned Cases by clicking on the title in blue. To preserve the list of cases you wish to review, right click the case title and 'Open link in new tab'.

The screenshot shows the 'Case Report' interface. At the top, there's a header with 'Case Report', a checkbox for 'Include Terminated Documents', a 'Document Status' dropdown, a search bar, and an 'Add Case' button. Below that is a table with the following columns: ID, Client/Party, Title, Description, Status, Delivery Date, Created On, Updated On, Completed On, and Action. The first row is highlighted with a red box and contains the following data: ID: 1150, Client/Party: Miss. Penelo..., Title: [Test Penelope Uk Missing Case](#), Description: [Click Here](#), Status: 📌, Delivery Date: [Delivery Date](#), Created On: 📅 Fri, Oct 11, 2024 12:08:38 PM, Updated On: 📅 Mon, Mar 17, 2025 01:29:02 PM, Completed On: (empty), Action: ⋮. Below the table, there's a 'Limit' dropdown set to '10' and a pagination bar showing '1' of 1 items.

7. Report results can be exported by clicking the turquoise button and downloading.



8. The report will show the results in graph and data form.

