Manage Legal Matters

A Legal Matter is thought of to be any Legal Project that is different from a Litigation Case. A Legal Matter could be a Legal Consultation, Agreement Drafting, Company Incorporation or NDA Generation.
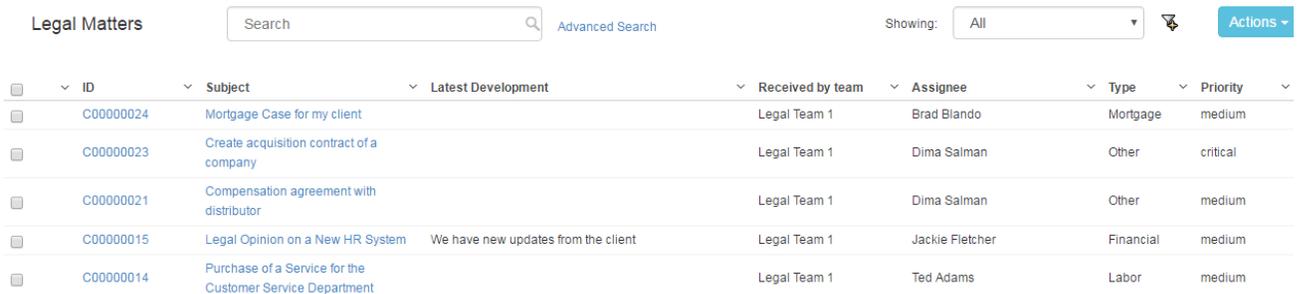
☐ How to access it

From the main menu "**Case -> Legal Matter**".

☐ Add/Edit a Legal Matter

Adding a Legal Matter is done via 2 ways:

1- From the Legal Matters grid, go to the Actions button and Choose Add Legal Matter.

	ID		Subject	Latest Development	Received by team	Assignee		Type		Priority	
☐	C00000024		Mortgage Case for my client		Legal Team 1	Brad Blando		Mortgage		medium	
☐	C00000023		Create acquisition contract of a company		Legal Team 1	Dima Salman		Other		critical	
☐	C00000021		Compensation agreement with distributor		Legal Team 1	Dima Salman		Other		medium	
☐	C00000015		Legal Opinion on a New HR System	We have new updates from the client	Legal Team 1	Jackie Fletcher		Financial		medium	
☐	C00000014		Purchase of a Service for the Customer Service Department		Legal Team 1	Ted Adams		Labor		medium	

2- From the Quick Add, choose Legal Matter.
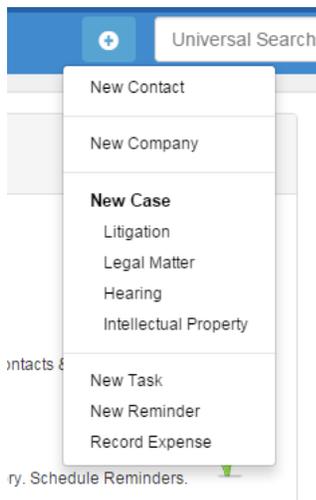
The Add form of a Legal Matter has the basic data that needs to be inserted. The mandatory fields are the ones in red only. After adding a Legal Matter, it will be designated by a **Case ID** that is automatically generated by the system. Once the user clicks on the Case ID from the grid, the Legal Matter form opens where the user can be view/edit the Legal Matter data.

Also from the action wheel next to a Legal Matter entry, choose View/Edit

A Legal Matter form has a lot of important data to be tracked such as

- Case Type: A defined drop-down list. Types can be for example Legal Consultancy, Drafting Agreement, Generation of NDA and similar.
- Case Workflow: A Workflow should be defined in the Admin & Setup-> Workflows. It is thought of as the action that transits the Case from one Status to the other. For more info, visit the Configure Workflow page in the Admin & Setup. Case Statuses are reflected on the Case Board.
- Status Comment: It is a small text field that resembles the last updated Status of the Case in brief.
- Reference number: It is the internal numbering of a Case that is different than that of the Court. This is the firm's reference of file number of the Case.
- Case Stage: A defined drop-down list that depicts that legal technical stage of the Case. It is also track through a Case Stage History Report.
- Dates such as Arrival Date, Filed on Date, Due Date and Close on Date
- Priority: A defined list that is hard coded. Priority serves the color coding on Case Boards.
- Received by Team: Medium to Large teams may wish to divide the Legal teams based on their specialty. Teams are managed through the Admin & Setup-> Received by Teams.
- Assignee: The App4Legal user who is assigned on this Case who compulsorily has to belong to the above chosen Received by Team. This is managed through the Admin & Setup-> Users & Permissions section-> Manage Users. Within the User form, go to Personal information and choose the **Member of** field to be the appropriate Received by Team so that the name of the user appears in the drop-down list.
- Client: A Client could be either a Company or a Contact. The Client can also be added on the fly.
- Case Details such as Subject, Description and Latest Development.
- Case Value: Case Values are associated with 2 Reports in the Reporting Module called **Case Value Tiers** and **Case Value per Client**.
- Estimation of effort: It is where an effort could be estimated versus the actual Time Logs that are recorded on the Case. This could work as an assessment of the performance on this Case.
- Privacy: A Legal Matter can be marked as Private and hence it will not appear to other Users on App4Legal. If a User is the creator of the Case and marks it as Private, he/she will be the owner of this Case. The Private Case could also be Shared with other specified Users. Users who are marked to Override Privacy will be able to see any Private object in App4Legal.

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Add configurations on the fly

All drop-down lists in App4Legal are configurable through the Admin & Setup. Luckily, some configurations can be configured on the fly. For instance, in the Legal Matter form, a user is adding data and wants to have a new Case Type swiftly. There is a blue plus sign that can assist the user to add a new value to the Case Type drop-down list on the fly.

Values that can be similarly added on the fly in a Legal Matter form are:

- Case Type
- Case Stage
- Case Contact Roles
- Case Company Roles
- Other Roles

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☐ **Manage Case Custom Fields**

Visit the Configure Case page in the Administration & Setup for more info.

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☐ **Relate Companies and Contacts**

In the Companies & Contacts section in a Case, the user can relate a Contact or a Company to the Legal Matter and specify the Role with Comments.

Roles are defined lists from the Admin & Setup. Also Roles could be added on the fly as discussed in above bullets.

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☐ **Add Outsourced Lawyers**

In case there is a need to Outsource the Legal Matter to an external counsel, in the Outsource to Lawyers section you can track such information.

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☐ **Add Contributors**

In case there are Contributors on the Legal Matter, in the Contributors section you can track such information.

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☐ **Add Case Notes**

In the Activity section, Notes can be added to the Case such as any development or MOMs or similar. Notes are tracked in a chronological order. Once the Activity section is expanded, the first Note is expanded by default. Notes can also be added on behalf of another User and with an appropriate date. A note can have an attachment on it that will appear in the Related Documents under Notes file. A URL can also be linked to a Case Note.
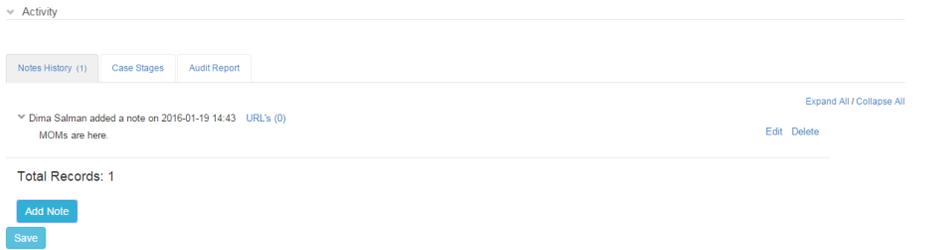
Through our Outlook Add-in feature, Emails can be uploaded as Case Notes as well. Visit our Outlook Add-in page for more info.

Note that if the Customer Portal feature is active and the Case originates from the Customer Portal, Users have the option to select if this Note is visible of not from the Customer Portal side.

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Track Case Stage History

Changes on Case Stage are tracked in a report within the Activity section. All what the user has to do is just change the Case Stage of a Legal Matter and accordingly the counters of the report will be activated. A Case Stage Report tracks for how long the Case lingered in a certain Stage, by whom it was moved and when. Records can be edited in case of a mistake using the action wheel next to every entry. The Report can be exported to excel using the top right action wheel.

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Track Case Audit Report

An Audit report tracks basic changes on a Case. It can store information such as the variation of the Assignee, who changed the field and when.

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Relate Documents

The user can relate Documents to a Legal Matter such as MOMs, Agreements, Proxies, Legal information etc.. Documents can be arranged in folders. Privacy can also be applied on a folder and the privileged user can control with whom to share the file.

Files and Folders can be Categorized by Type, Status and optional Comments. Document Type and Statuses are managed via the Admin & Setup.

Documents can be related by either physically applying Documents can be added by 2 ways. Either by the drag-and-drop procedure
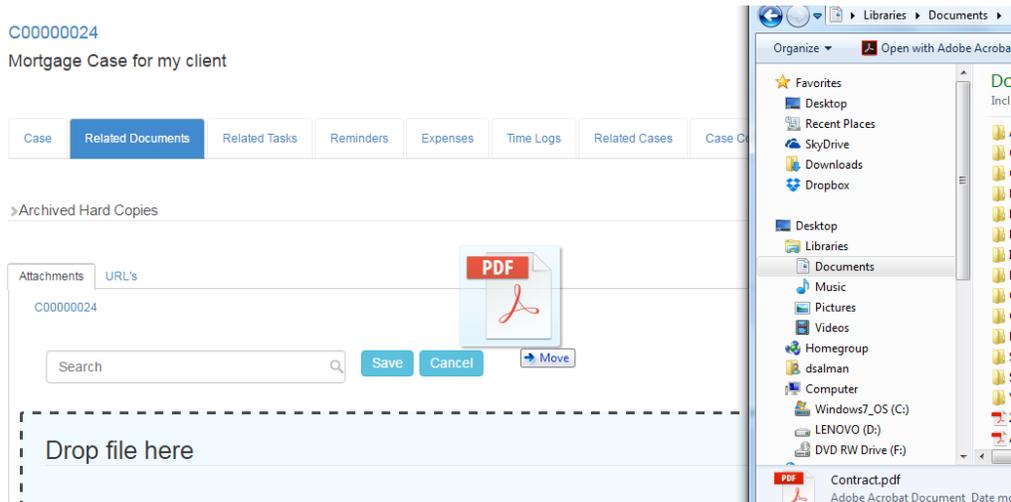
or by uploading the files.

Note that if a File/Folder is added/uploaded with spaces in its name, the system will automatically replace the spaces with underscore for technical reasons. After the File/Folder is added, they can be managed using the action wheel on the grid.

C00000024

Mortgage Case for my client

| Attachments | URL's |

C00000024

Search [Search] | Save | Cancel | Actions ▾

Actions ▾	Name	▾	Type	▾	Status	▾	Comments	▾	Size	▾	Location	▾	Modified By	▾	Modified On	▾
⚙▾	📂 MOMs												Dima Salman		2016-04-18 08:04:59
Rename	ey												Dima Salman		2016-04-18 08:04:12
Delete													Dima Salman		2016-04-18 08:04:14
Share With													Dima Salman		2016-04-18 08:04:19
Copy Path								81.85 (KB)					Dima Salman		2016-04-18 08:04:27

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File/Folders can be

- Renamed
- Deleted
- Shared With: Folder can be set as Private that means only the creator can see it and with chosen App4Legal Users if needed. Folders that are locked are designated with a lock sign. Users who are set to Override Privacy can see all Private objects on App4Legal.
- Copy Path: Folder/Files paths can be copied in order to be shared with colleagues for fast access.

As an alternative to manually adding Files/Folders, and if there's an already implemented Document Management System, you may map a URL to the Legal Matter documents to any Network Drive or Web link.

Add New URL ✖

Document Type*	Administrative ▾
Document Status*	3-Approved ▾
Document Name	Agreement 1
URL Type*	Web ▾
URL*	http://app4legal.com
Comments	

Save | Cancel

- **Inline Edit of Office Documents:**

App4Legal's Documents module offers a very nice feature that allows the user through App4Legal to edit Office documents. This feature is supported on all modern browsers except **Chrome.** All what the user has to do is click on an Office Document such as a Word document. The user can edit the Document and click Save, the Document will be saved directly in the Documents module.

If a user has the Document open and is editing it in the meantime, if another user tries to open the same Document the system will prompt a message informing the user that the Document is already in use.

- In App4Legal, **Archived Hard Copies** can be tracked from within the Related Documents tab. You have up to 2 classification of the location of Hard copies with Notes on the side. For more information about the Documents Classification, visit the Configure Documents page in the Admin & Setup.

▾Archived Hard Copies

Main Classifications	Sub Classifications	Notes	Actions

Add Archived Hard Copies

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☐ **Relate Tasks**

Tasks can be related to a Case or not. Tasks can be added from the Related Tasks tab via the Actions button-> Add Task, from the Tasks grid or from the Quick Add drop-down list. If the Task is being added from within the Related Tasks tab in a Case, the associated Case is selected by default.

In the Related Tasks of a Case, you can Search for a Task based on its Description. For more info about the Task module, visit the Manage Tasks page.

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☐ **Add Reminders**

The Related Reminders on a Case are tracked in a dedicated tab. If the Reminder is being added from within the Related Reminders tab in a Case, the associated Case is selected by default. A Reminder can be added from the Actions button-> Add New Reminder.

Reminders list can be exported to Excel. The user can also search for an existing Reminder using the Search field in the Related Reminders tab. The action wheel next to every Reminder entry is useful to apply additional actions such as View/Edit, Dismiss, Delete and Postpone.

You may wish to relate a Reminder to a Case at any time, you can directly go to the bell-shape icon on the top right of the screen, click on it. A list of pending Reminders will appear in case they are previously added. At the bottom of the list, there is an Add action.
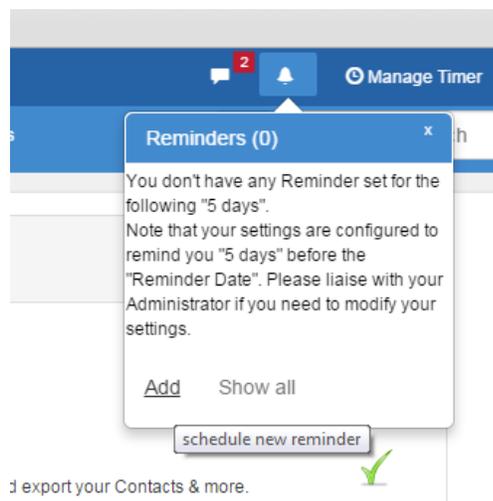
The Add action will redirect the user to the Reminder add form.

Add New Reminder

Reminder Type *	General Assembly ▼ ⊕
Remind On*	2016-01-19 07:00
User to Remind*	Start Typing Add me
Summary*	

☐ Clone Users

☑ Related Case

1   goto

Legal Matter 1...

☐ Related Company

Start Typing

☐ Related Contact

Start Typing

☐ Related Task

Start Typing

Save   Cancel

Choose the Reminder Type and choose the desired Case in the Related Case section. For more info about the Reminders, visit the Manage Reminders page.

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☐ Record Expenses

The Related Expenses on a Case are tracked in a dedicated tab. Record Expense can be done

1- Through the Related Expenses tab on a Case via the Actions button-> Record Expense

2- The Quick Add drop-list

3-The Expenses grid in the Money module.

4- From the action wheel next to a Legal Matter on the grid

If the Record Expense is done via the Expenses tab in a Case, then the Related Case and Client are selected by default.

You can also check one from this flags:

- This Case is Internal and all expenses related to this case are not billable

- The Time tracking related to this case is billable by default

The Status of your Case if you want it billable or internal will be impacted based on your choice.
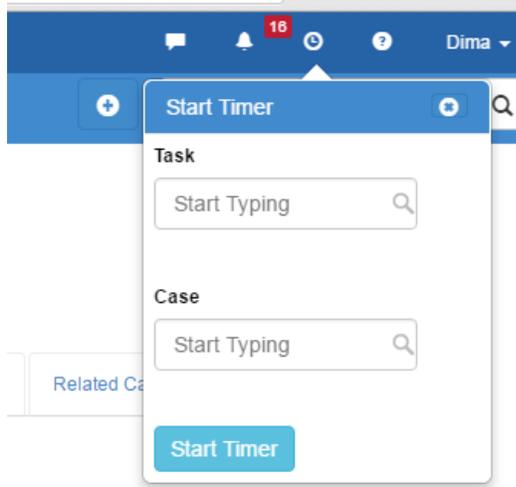
Via the Expenses tab, a "Statement of Expenses" can be generated on this Case. Expenses may also be exported to an Excel sheet. For more information about the Expenses, visit our Manage Expenses page.

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☐ **Log Time on a Legal Matter**

Logging Time on a Case is done in many ways

1- Through the Time Logs tab in a Case via the Actions button->Log Time

2- Through the Time Tracking grid

3- Through the Manage Timer on the top right of the screen:

4- Through the action wheel on the grid via Log Time action or Start Timer

Once the Timer is stopped, the Time Log will be directly associated with the specified Case or Task. Time Logs can then be managed through the Time Tracking grid.

If the Log Time is done via the Time Logs tab in a Case, then the Related Case is selected by default. Time Logs can also be done on a Task. If Log Time is done via the Time Logs tab in a Case, then the Task has to be also related to this specific Case.

Time Type is a defined drop-down list that can be managed from the Admin & Setup. If a user didn't find a match among the defined values, then using the blue plus sign, a new value can be added on the fly.

Time Logs can be either billable or internal. If the internal flag is chosen, hence these Logs will not be fed into the Invoice creation in the Money module. Moreover, the number of hours spent will be multiplied by the User Rate per Hour. The Comment inserted related to this Time log will be concatenated with the Time Type and inserted as a Description of the Invoice item.

Logged Time is considered to be the effective estimation of effort. Hence, in the Case form, under effort you will find that the system will calculate the total effective effort and compares it with the estimated effort for better assessment.

User Rate per Hour is defined in the Money Module. For more information, check the Money Setup page. However, the predefined rates can be overrode via the **Specific User Rates** grid. This grid is specifically used to define the User Rate that are specific to this Case only. Specific Rates can be added via the Actions button-> Add User Rate. The added Users are managed in the grid. Editing the value can be done by double clicking on the grid itself.

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☐ **Relate Cases**

In the Related Cases within a Case, relation can be created between one Case and another. In the Relate to Case field you can look up for the Case to be added, choose it, choose Add Relation and in the Comment field you can double click and add the business need behind the relation.

C00000024

Mortgage Case for my client

| Case | Related Documents | Related Tasks | Reminders | Expenses | Time Logs | Related Cases | Case Container |

Relate to Case | Case Subject 🔍 | Add Relation

Save   Cancel

Case ID ⌄	Comment ⌄	Companies ⌄	Referred By ⌄	Assign To ⌄	Case Type ⌄	Case Priori... ⌄	Case Status ⌄	Actions ⌄
C00000021	My business need			Dima Salman	Other	medium	جديدة-1	✖

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☐ **Group Cases by a Case Container**

Cases can be grouped by the Case Container feature. The Case Container is common for both Litigation Cases and Legal Matters. A Case can be related to a Container within in its form or from the Case Container form. From the top of the Case grid, choose Actions->List Case Containers to go to the grid of Case Containers. Managing of Case Containers is possible through the grid.

The user can add a new Container using 2 methods:

1- From the Actions button in the grid-> "Add Case Container".

Case Container   Search 🔍   Advanced Search   Actions ▾

⌄ Container ID ⌄	Subject ⌄	Status ⌄	Created By ⌄	Created On ⌄	Modified By ⌄	Modified On ⌄
CC00001	container 1	1-Open	Dima Salman	2016-04-18 10:20:09	Dima Salman	2016-04-18 10:20:09

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In order to edit a Case Container, click on the action wheel next to the Container ID and choose View/Edit or Delete. A Case Container has a Status and Cases can be added to it via the edit form of the Container. The search feature is useful to search for an already inserted Container in the grid.

2- Adding a Container on the fly from the Case form. Look up the Container from within the Case Container tab, choose and click Add Container so that this Case will be grouped in this chosen Container. If the Case Container doesn't already exist, start typing the Name of the Container and the system will prompt to add it on the fly.

C00000002

My Legal Matter

| Case | Related Documents | Related Tasks | Reminders | Expenses | Time Logs | Related Cases | Case Container |

Container 2 🔍   Add Container

No Matches Found; Click to Add "Container 2"

⌄ Status ⌄	Created By ⌄	Created On ⌄	Actions ⌄

|◀ ◀ Page 0 of 0 ▶ ▶| 5 ▼ items per page   No items to display ↻

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☐ **Manage Filters on the grid**

App4Legal offers the ability to save predefined filters. For instance, a user uses the Advanced Search to apply a certain filter on Cases in App4Legal database. The user wishes to apply this filter every time the grid was accessed. Managing filters is easy and is done via the Cases grid.

Once any filter in the Advanced Search is applied, all what the user has to do is Add Filter. Then later on, whenever the Filter is chosen from the list of Filters, the Advanced Search filters automatically apply and the grid is filtered automatically.

If there is a need to edit or delete any Filter, click on Manage Filters.

If a Filter is chosen and you wish to update the filters applied in the Advanced Search, it is possible. Go to the Advanced Search, apply your new filters and choose, Submit and Update Filter.

If you do not wish to impact the filter, you can just click on the regular Submit. It will not take any action over the Filters.

The filters applied above are local ones unlike a **Global Filter**. A Global filter functions the same way as a regular Filter except that one it's configured it will appear to all App4Legal users on their grids. Only Authorized users are allowed to add a Global Filter. They are managed from the Admin & Setup-> Setup & Configuration-> Default Values->Filters Grid Admin User Groups. This is where the Administrator can add the User Group that has the authority to add a Global Filter.

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Search for an existing Legal Matter

There are 3 methods to search for an existing Legal Matter: Quick Search, Advanced Search and Universal Search:

- In **Quick Search**, from within the Cases grid, you can type any string from the Subject of the Case and hit Enter from your keyboard to generate your search results.
- Using **Advanced Search**, you can run your search on a specific field from the Case form. You'll have the possibility also to modify the operator of search for each field (i.e. equal, begins with, contains, >, <, and more). The Advanced Search menu is hidden by default; you need to click on the link Advanced Search from the Companies grid to view it.
- With **Universal Search**, you can type any string from the Subject of the Case and hit Enter from your keyboard to generate your search results. The Universal Search looks into all the App4Legal database.

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Set Partner Shares

Partner Shares has to be activated first in the Money Settings. For more information visit the Money Settings page. Companies/Contact should also be flagged as Partners from within the Money Module. For more information visit our Partners page.
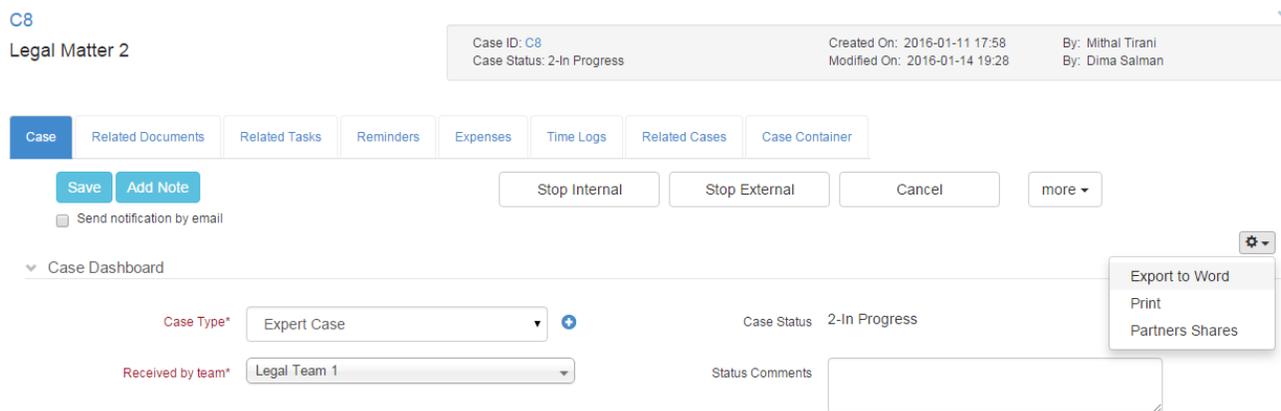
Once the Partner Shares is activated and the Partners are defined, through the action wheel on the top right of the Case, Shares of Partners can be predefined so that it take action in the Invoice module. The total of Shares shouldn't exceed 100.
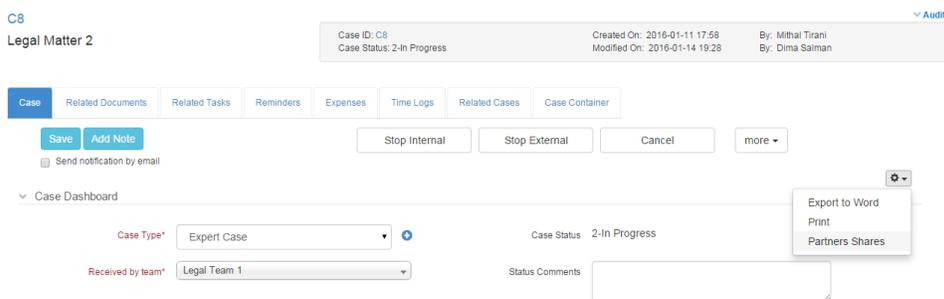
☐ **Export to Word**

Via the action wheel on the top right of the Case, a Case can be exported to Word.

Or from the action wheel next to a Legal Matter on the grid

The most important data is visualized in a Word document.

☐ **Delete a Case**

From the action wheel, there is an option to delete a Case. A Case if not related to any Money object such as Expense, Bill or Invoice, may be deleted from the system along with all the related metadata.
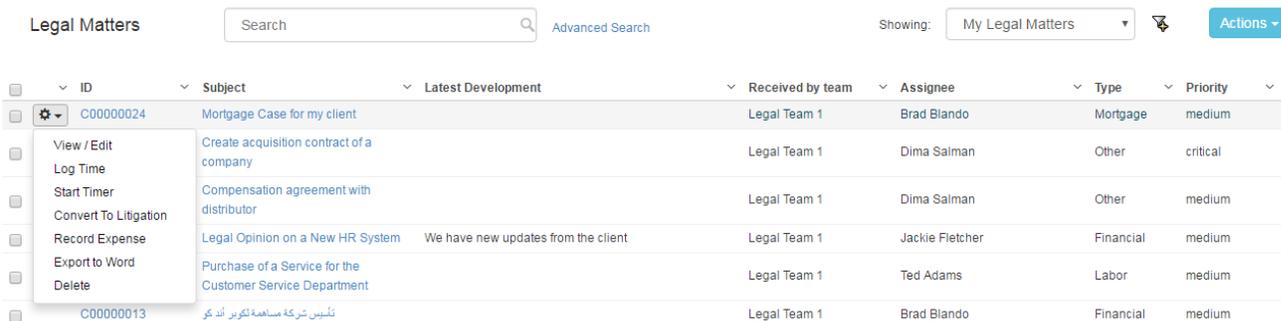
☐ **Print a Legal Matter**

Via the action wheel on the top right of the Case, a Case can be Printed. The most important data is visualized in a Print mode that is browser specific.

☐ **Convert to a Litigation Case**

If for any reason a Legal Matter needs to be converted to a Litigation Case, it is possible to be done via the Action wheel next to a Legal Matter in the grid.

The system will then migrate the Legal Matter to the Litigation Cases grid while maintaining its data.

☐ **Export to Excel**

The Cases grid can be exported to an excel sheet at any moment via the Actions button on the grid-> Export to Excel. Also, search results can be exported to an excel sheet separately.

☐ **Archive/Unarchive Cases**

You may wish to Archive Cases in order to decrease the size of entries on grids. Archiving is done through the Case Board.

Archiving is done based on the Default Archive Case Status that is defaulted in the Setup & Configuration-> Default Values in the Admin & Setup. Multiple Statuses can be set. Once the Archive Cases is clicked the system will prompt a message to make sure that the user wants to Archive Cases having the specified Status(es).

In order to **Unarchive Cases** , you need to go to the Cases grid-> Advanced Search-> Archived field choose it to be Yes and click Submit.

It will display all the Archived Cases. Then on the grid, mark the Cases that you wish to unarchive, click on the Actions button -> Unarchive.

This action will retrieve all the marked Archived Cases back to the grid and Case Board.

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