

Legal Requests Table

The Legal Requests table is used to hold requests submitted by users for legal help. It functions similarly to the Helpdesk tables, but for legal issues. Requests are routed to the appropriate legal teams or people based on the type of request.

A Legal Request can turn into a new Matter record or a new Contract record. and can be linked to that record.

Roles, Teams, and Groups

The Legal Requester role is able to submit Legal Requests. Users with this role are put in the Legal Requester group and the Legal Requester Team. They are given access to create their own Legal Requests and to view those submitted by others where they have been added as a Request CC. They are also given basic contract requester permissions. A user who is only in the Legal Requester group will enter via the Simple Portal interface and will be able to create a request and view their own and others' requests using the menu links.

If a Legal Requester is also added to a power user role such as the Contract Requester role, then they can access Legal Requests via the dashboard.

The people on the legal team who are responsible for resolving Legal Requests, as well as Matters, belong to a role called Legal Request/Matter Manager or one of the other Legal Team roles, and they will all be added to the Legal Group.

Use Case

Use this section to learn about how to use the Legal Requests table.

Submission of a Request

Legal Requests may be submitted by end users under the Read/Request license or by power users through either the main contract requester dashboard or the main navigation bar. When the request is submitted, the user selects the Request Type from a list of preconfigured matter types. This list is drawn from the Matter Types table, filtered to those that are available as legal requests.

Depending on the Request Type selected, certain fields will become visible. If "Issue Related to Existing" is chosen, a lookup to select a matter is visible. If "Contract Related Question" is chosen, a lookup to select a contract is visible. Each Request Type comes with some instructions that are defined in the Matter Types table, which inform the user about the details they need to provide. The user can then enter a summary, add CCs, and provide a preferred answer date.

The user can also set a priority, choose whether the request is confidential, and attach files. Note that the Confidential field values are based on the Matter Type; some matters types are always confidential, while others are optionally so.

When done, they click Save to submit their request. If they have identified any Request CC's those people are notified and the requester receives an acknowledgement email.

Request Assignment

When the request is saved, it is automatically assigned according to the following logic.

- If a specific contract or matter has been selected, and that record has an owner, it is assigned to that person and to the main team for the request type.
- Otherwise, it is assigned to a team based on the default team identified for the Matter Type that was selected.

The assigned person or team is then notified in an email about the new request.

Creating a Matter or Contract

If the request is to create a new Matter or Contract record, the corresponding button appears on the legal request form, available only to the legal team to use.

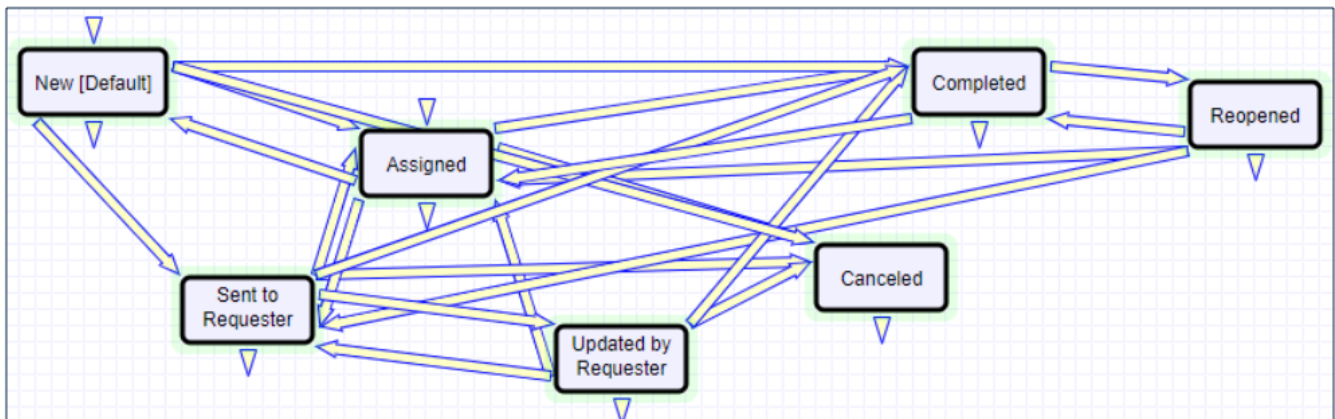
The user can choose the Record Type and Contract Type, but the legal team member can change it if needed after the fact. The user then clicks the Create Contract button. This brings up the new contract screen to fill out, with some of the information mapped from the legal request.

Once the contract is saved, it is linked back to the legal request for reference. The requester becomes the contract requester.

The same situation applies to a new Matter record. When the Matter record is created, the requester is added to the list of people who can view the record.

Workflow and Automated Email Notifications

The workflow is a standard helpdesk or support workflow:



- When a person is assigned rather than a team, the status is automatically changed from Draft to Assigned. If the person was assigned by someone else, they receive an email notifying them of the new assignment.
- If the assignee needs further information from the requester, they can set the Status to Sent to Requester or just add notes to the Notes to and from Requester field, and the system sends the requester and any CC'd users an email with the notes.
- If the requester updates the request by adding notes, the assigned person is notified. If the status was Sent to Requester, the system also updates it to Updated by Requester.

- When the request has been completed, the assigned person changes the Status to Completed, which sends an email to the requester and CCs.
- At that point, the requester may reopen the request if needed by checking a box and adding notes. Doing so sets the status to Reopened and notifies the assigned person.
- A Cancel button on the layout can be used to cancel the request. No email is sent when canceled.

Confidentiality

If a request is marked as confidential, it is only visible to the requester, any CC'd users, and members of the assigned team or assigned person. Other members of the legal team do not have access to it.

Charts and Reports

A few reports have been created for Legal Requests, as well as saved searches for the Legal managers. There is also a Legal Manager dashboard that shows users their assigned legal requests.