Working With Records

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Adding and Viewing Records

Adding Records to Legal is straightforward, whether at a system, project, or Jira Issue level. The Legal Management app within Jira streamlines the process, allowing users to seamlessly input and maintain legal-related records within their current workflow.

Records can be added with detailed information covering several fields: Task ID, Department, Assigned Team Member, Task Type, Due Date, and Status, as well as any custom fields you define. To initiate this process, navigate to the Legal dashboard and click the Create button. Input data for each of the aforementioned fields, along with tags and any custom fields pertinent to your project needs.

On the Legal dashboard, you can perform the following actions:

1. **Create and Manage Multiple Views**
   Use the View dropdown at the dashboard's top to create new views, manage existing ones, or clear current views. Note that making changes to views requires admin role access.
2. **Filter by a Column Value**
   Filters can be applied to column values by selecting the column title icon and entering the desired criteria. Filtering is only available on columns with the filtering feature enabled.
3. **Sort by a Column Value**
   Records can be sorted by selecting and double-clicking on a column title, allowing for forward or reverse sorting based on that column's data.
4. **View Activity History**
   All modifications made by users are tracked and can be accessed by clicking the three dots on the dashboard's top right corner and selecting Activity History.

These functionalities provide comprehensive control over data management, ensuring efficiency in handling legal records and facilitating a streamlined workflow.