

# Appvibe Legal Management

- Overview of Features
  - Key Features
- Getting Started
  - Installation
- Configuration
  - Setup and Customization
- Working With Records
  - Adding and Viewing Records
- FAQ
  - FAQ
- Support
  - Appvibe Support

# Overview of Features

# Key Features

Appvibe Legal Management, designed for Jira, is a comprehensive tool for managing legal tasks, compliance reviews, and contract management. By integrating directly into Jira, it enables corporate legal teams to effectively track outstanding tasks, monitor progress and deadlines, and manage linked documents, streamlining overall workflow and ensuring thorough oversight.

Incorporating customer feedback is pivotal in enhancing legal case management. Valuable insights gathered from client feedback can lead to improvements in legal strategies, processes, and service delivery. This app facilitates capturing and managing this feedback efficiently, directly impacting legal performance and client satisfaction.

- **Feedback Submission.** Capture feedback seamlessly through Jira issues and dedicated forms.
- **Organized Views.** Use tags, filters, and saved views to sort and prioritize feedback efficiently.
- **Direct Jira Integration.** Link customer feedback to Jira issues, ensuring actionable follow-ups.
- **Customizable Layout.** Add, remove, or rearrange columns to suit your team's feedback tracking needs.
- **Activity History.** Maintain a clear log of actions and updates made to each feedback record.

Appvibe Legal Management not only integrates seamlessly into existing workflows but also enhances the ability of legal teams to make data-driven decisions. With improved feedback management, teams can prioritize effectively, respond swiftly, and make strategic adjustments to match the ever-evolving legal landscape. This results in a robust approach to handling legal tasks, with a focus on continuous improvement and client satisfaction.

# Getting Started

# Installation

Legal Management is a Jira app designed to streamline legal processes within your projects. Follow these steps to install and access the app efficiently.

## Step 1:

Log in to Jira with Admin privileges.

## Step 2:

Open the Atlassian Marketplace. In Jira, click on Apps → Explore more apps to open the Marketplace.

## Step 3:

Search for **Appvibe Legal Management**. Use the search bar to find the app.

## Step 4:

Install the App. Click Get app or Try it free. Confirm the installation and grant the required permissions.

## Step 5:

Once installed, go to Manage Apps in the Admin section to ensure it's enabled. You can find a link to Legal Management under the Apps section in the menu on the left side of the screen.

By following these steps, you can successfully integrate Legal Management into your Jira setup, enabling you to manage legal tasks more effectively directly within your projects.

# Configuration

# Setup and Customization

Appvibe Legal Management is a Jira app designed to streamline legal task management. To configure and set up the app, navigate to **Manage Apps** in Jira, locate **Appvibe Legal Management**, and click the **Configuration** button. This will guide you to the configuration page where you can set up roles and permissions, manage system and custom fields, and configure conditional formatting.

## Roles and Permissions

Appvibe Legal Management offers three roles:

1. **Admin:** This super role provides access to all features, including configuration and setup.
2. **Editor:** Users with this role can fully update and view legal management data.
3. **Viewer:** This role allows users to view but not modify legal management data.

Admins can assign these roles to any Jira groups. By default, a Jira Administrator has access to the Legal Management configuration screens.

## System Fields

The app includes predefined legal management fields by default:

- Task ID
- Department
- Assigned Team Member
- Task Type
- Due Date
- Status
- Tags

These are the base fields necessary for effective legal management.

## Custom Fields

If additional fields are required, you can add them via the **Add Field** button. When creating a new field, configure the following options:

- **Field Key:** A unique key for the field
- **Field Label:** Descriptive label for the field key
- **Field Type:** Choose from Text, Number, Date, Select, or Multi-Select
- **Required:** Flag to indicate if the field is mandatory
- **Sortable:** Flag to enable sorting functionality
- **Filterable:** Flag to enable filtering functionality

## Conditional Formatting

This feature allows data formatting based on specific conditions. You can set conditions based on field values, and apply label and highlight color changes when conditions are met.

## Summary

The Appvibe Legal Management app offers flexible tools to manage and organize legal tasks within Jira through customizable roles, fields, and conditional formatting. By configuring these elements, you can tailor the app to suit the specific needs of your legal team.



# Working With Records

# 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.

# FAQ

# FAQ

## **What is the object and purpose of this app?**

The purpose of the app is for Legal Case Management. It is designed to track outstanding legal tasks, compliance reviews, and contract management, helping corporate legal teams monitor progress, deadlines, and linked documents.

## **What types of feedback can the app track?**

The app supports tracking Legal Task ID, Department, Assigned Team Member, Task Type, Due Date, and Status. You can also add custom fields for other related elements that you wish to track.

## **How do I install the app?**

You can install the app from the Atlassian Marketplace. Navigate to the Apps section in Jira. Search for the app name "Legal Management." Click Install and follow the prompts.

## **How do I get support for the app?**

Support is available via our support page at <https://appvibe.com/support>

# Support

# Appvibe Support

**Overview:**

We are here to help you. The Appvibe Legal Management app makes it easy to manage and access Legal within Jira. The app allows a business to track outstanding legal tasks, compliance reviews, and contract management, helping corporate legal teams monitor progress, deadlines, and linked documents.

**Support Contact:**

If you need further assistance or want to suggest additional features, you can reach us on our Support Page at <https://www.appvibe.com/support>