

Legal Service Delivery



❑ Legal Service Delivery in ServiceNow refers to a set of services

and processes provided by legal departments or organizations

within the ServiceNow platform.

❑ It aims to streamline and automate legal processes.

❑ Legal Service Delivery in ServiceNow can also help in tracking and

reporting legal metrics.

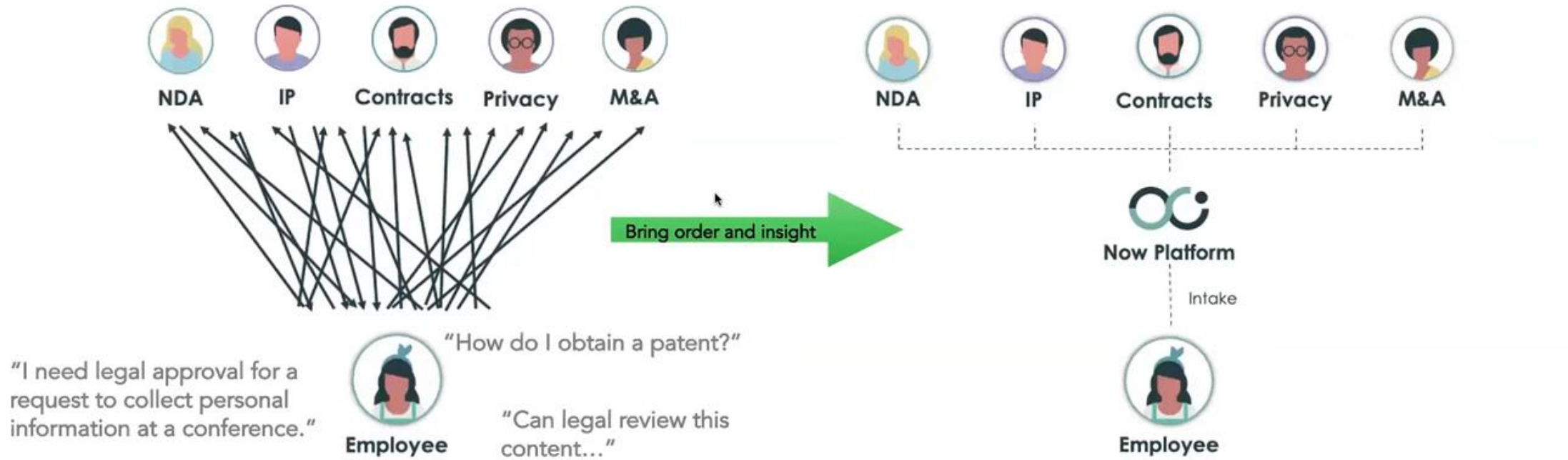
Agenda

- Legal Self Service
- Legal Request Management
- Legal counsel center
- Legal Matter management
- Legal Operations Dashboad
- Practice Areas
- Reference List

Legal Service Delivery

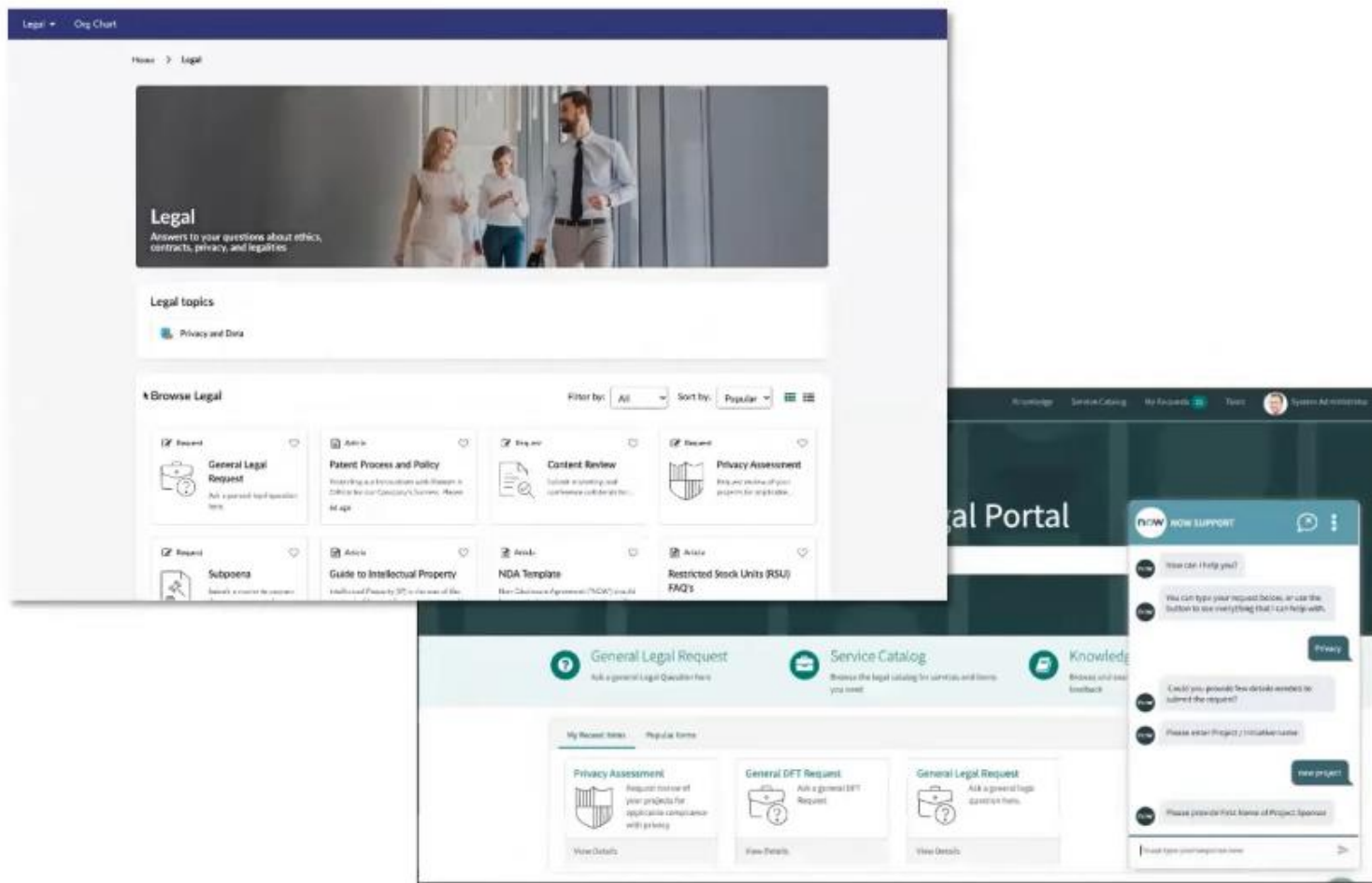
- Unstructured processes

- Streamlined approach



Legal self-service

Deliver 24x7 legal service help



Outcomes

Remove manual email processes with an engaging self-service portal

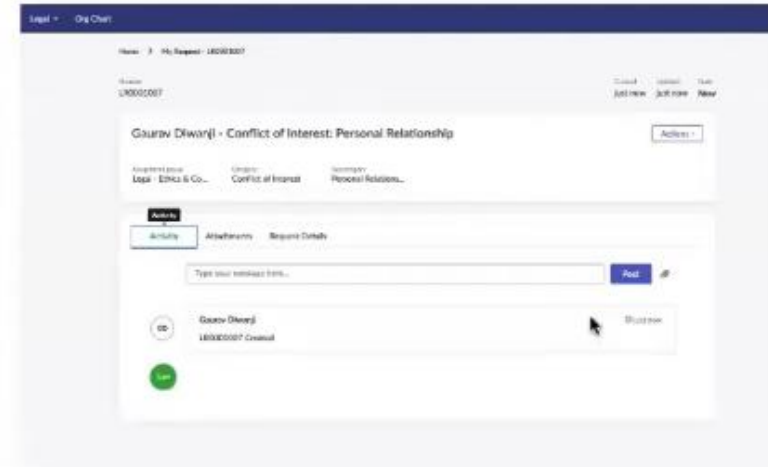
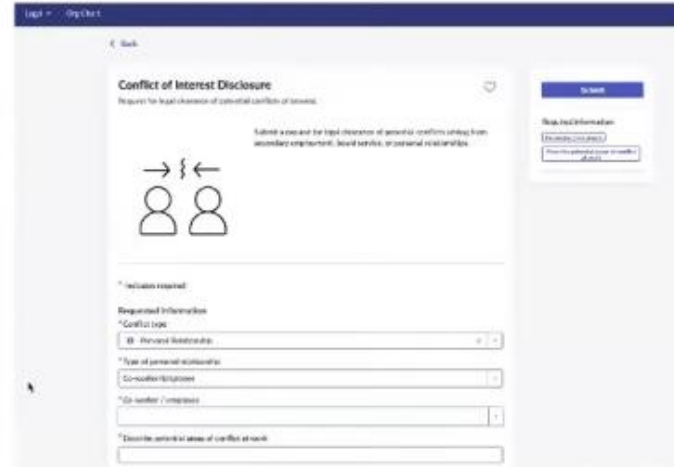
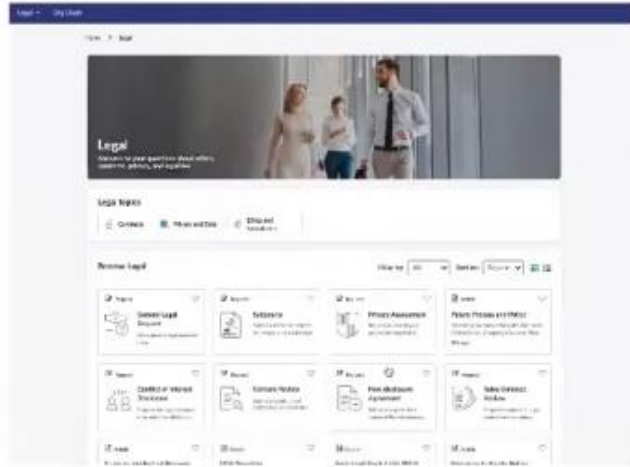
Automate responses for common legal requests with virtual agents

Configure and deploy out-of-the-box or company-specific workflows for any legal scenario

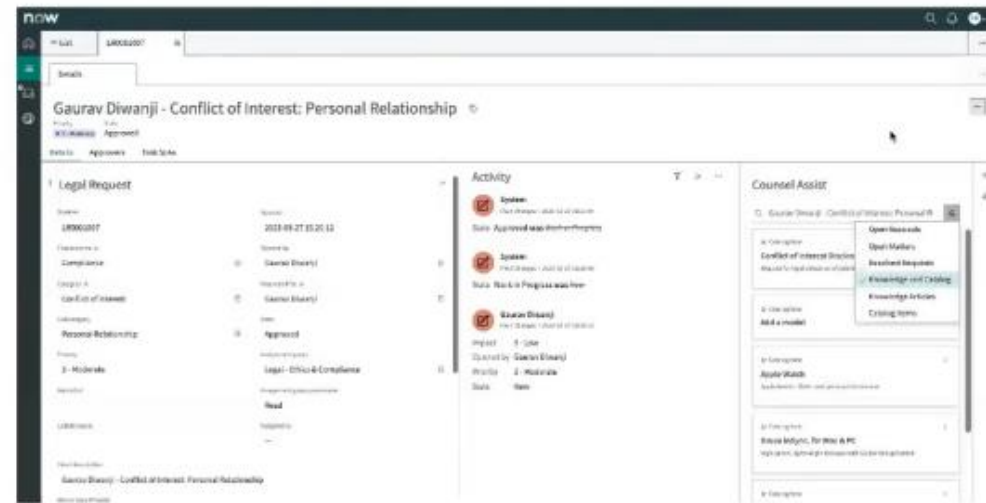
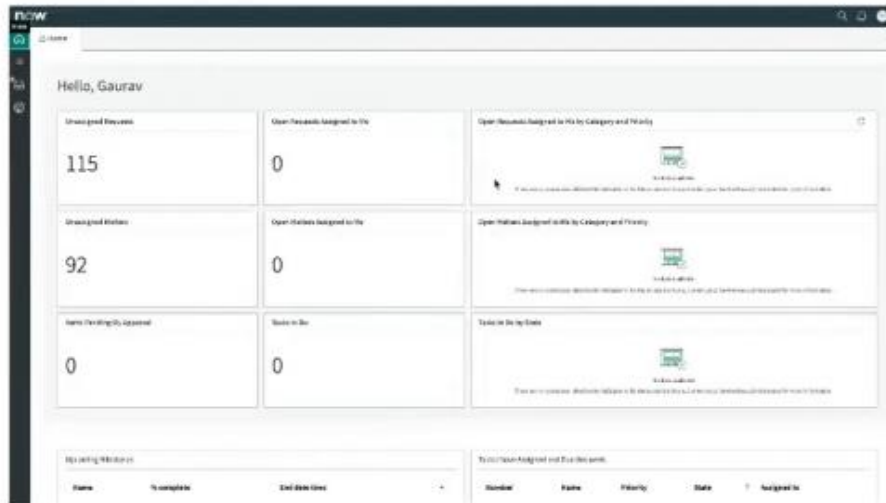
Legal self-service

Intake Forms and Legal Counsel Center

Requester



Legal Ops Team



Legal Request Management

Configurations Items

Practice Area: Specific areas of law practice, such as Intellectual Property, Privacy, or Compliance. Configure intake forms and leads associated with each practice area.

- Several delivered Practice area tables available OOB that extend Legal Requests table.

Note that legal matters has a similar practice area tables that extend the Legal Matter table.

The screenshot shows the 'Practice Area - General' configuration page. At the top, there are tabs for 'Favorites', 'History', and 'Workspaces'. Below this, the 'Practice Area - General' section is active. It contains a form with the following fields:

- Name:** General
- Service catalog category:** General Legal Requests
- Active:** ☒
- Description:** General Practice Area

Below the form are 'Update' and 'Delete' buttons. A blue tooltip is visible over the 'Service catalog category' field, stating: 'Used only for Legal Service Portal. For Employee Center, use the Taxonomy mapping.'

Below the form, there are two tabs: 'Intake Forms (2)' and 'Practice Area Leads'. The 'Practice Area Leads' tab is selected. It shows a table with the following columns: 'Name' and 'Default subcategory'.

Name	Default subcategory
Content Review	Event Presentation
General Legal Request	Others

At the bottom of the table, there is a pagination control showing '1 to 2 of 2'.

For more information, see [Configure a practice area table](#).

- Compliance [sn_lg_ops_compliance]
- Corporate Support [sn_lg_ops_corporate_support]
- Crime [sn_lg_ops_crime]
- Digital Forensics [sn_lg_ops_digital_forensics]
- Ethics [sn_lg_ops_ethics]
- General Contract Support [sn_lg_ops_general_contract_support]
- General Legal [sn_lg_ops_general_legal]
- Government Affairs [sn_lg_ops_government_affairs]
- Health, Safety and Environment [sn_lg_ops_health_safety_and_environment]
- Labor and Employment [sn_lg_ops_labor_and_employment]
- Legal Operations [sn_lg_ops_legal_operations]
- Licensing and Tech Transactions [sn_lg_ops_licensing_and_tech_transactions]
- Litigation [sn_lg_ops_litigation]
- Marketing Support [sn_lg_ops_marketing_support]
- Mergers and Acquisitions [sn_lg_ops_mergers_and_acquisitions]
- Patents, Trademark and Trade Secrets [sn_lg_ops_patents_trademark_and_trade_secrets]
- Privacy and Data Security [sn_lg_ops_privacy_and_data_security]
- Procurement Contract Support [sn_lg_ops_procurement_contract_support]
- Real Estate [sn_lg_ops_real_estate]
- Sales Contract Support [sn_lg_ops_sales_contract_support]
- Stock Plan Support [sn_lg_ops_stock_plan_support]

Legal Request Management

Configurations Items

Record Producers

- Create new record producers, or use/ modify delivered record producers to capture intake.
- Record producers are linked to tables extending Practice App tables extending Legal Request or Legal matter tables.
- Catalog builder can be used to simplify the process of creating record producers.

The screenshot shows the 'General Legal Request' configuration page. The left sidebar contains a navigation menu with 'Details' selected. The main content area is divided into two sections: 'Basic info' and 'Item details'. The 'Basic info' section includes a toggle for 'Item is active', a link to 'Edit name', and a text field for 'General Legal Request'. The 'Item details' section includes a 'Short description' field with the placeholder text 'Ask a general legal question here.' and a rich text editor for the 'Description' field with the placeholder text 'Request for legal service or ask for any information related to legal.'.

The screenshot shows the 'Content Review' configuration page. The left sidebar contains a navigation menu with 'Details' selected. The main content area is divided into two sections: 'General Legal Request' and 'Content Review'. The 'General Legal Request' section includes a 'Description' field with the placeholder text 'Ask a general legal question here.' and a 'Summary description' field. The 'Content Review' section includes a 'Description' field with the placeholder text 'Submit marketing and conference collateral for review.' and a 'Content owner' field. The 'Content type' field is set to 'Marketing Flyer'. The 'Purpose' field has two radio buttons: 'Sales and marketing materials' (selected) and 'Event presentation'. The 'Requested approval date' field is at the bottom.

Legal Request Management

Configurations Items

Intake Forms Employees can use these intake forms on the Legal Service Portal to submit Legal Requests or Matter.

Intake Form: General Legal Request

Name: General Legal Request

Default subcategory: Others

Short description:

Record Producer

Select a record producer type to associate with the intake form.

1. You can associate an existing record producer or create a record producer using the related link.

2. When you create a record producer using the related link, it is populated with default values in the mandatory fields. You must open the record producer to update these fields and add icon and variables.

3. To enable creation of legal matter from a request, select the Request and Matter option in the Type field.

Type: Request and Matter

Request record producer: General Legal Request

Default matter template:

Options: Editable Assignment group in Request

Select target record:

Checklist:

Update Delete

Subcategories (3) SLA Definitions Assignment Rules (1) Matter Templates

Subcategory: Search

Options | ServiceNow

Options Name Search

Assigned To field not mandatory

Disable Request Author Approvals

Disable Request Reopen

Editable Assignment group in Matter

Editable Assignment group in Request

Enable External Storage for attachment

Make Request Fulfiller as Matter Owner

- Record Producers built on the Practice Area table extending Legal Requests are associated to Legal Intake forms.
- Options can be set for Legal Request/Matter.
- Intake Forms can be tied to a Request, Matter, or both.
- Legal categories, sub categories should be created and associated to Intake forms.

Categories

Package name contains legal

Title	Description	Catalog	Active	Roles
Search	Search	Search	Search	Search
Legal Matter	Catalog of all legal matter intake forms...	Legal Operations Catalog	True	an_lg_matter.matt
Legal Requests	Catalog of all legal intake forms availa...	Legal Operations Catalog	True	
Compliance Requests	Legal intake forms belonging to the Comp...	Legal Operations Catalog	True	
General Legal Requests	Legal intake forms belonging to the Gene...	Legal Operations Catalog	True	
Privacy Requests	Legal intake forms belonging to the Pri...	Legal Operations Catalog	True	

Configurations Items

- **External Storage System (Optional)**
- Store documents attached to legal requests by the requester or the fulfiller. Enables the organizations to have a centralized documentation management and retention policy.
- Box, Google Drive, OneDrive, SharePoint are storage systems that can be integrated with - this is supported via the Spoke architecture.
- Note that the trigger conditions on the OOB flows may need to be updated based on business requirements for Legal Contracts External Storage Flow.
- Note that by default, all users who have read access to the Request are granted access to the folder in the external system to read the files - this can be modified.
- The External Document Storage feature can be used to store *Matter Artefacts* as well as signed *Contracts* in the Simple Contracts practice area application.

Product Documentation

The screenshot displays the 'Compliance GDS Integration' configuration interface in the Splunk Enterprise console. The left sidebar shows the navigation menu with 'Legal Integrations' selected. The main configuration area includes the following fields and options:

- Name:** Compliance GDS Integration
- Description:** (Empty text field)
- Active:** ☒
- Tags:** (Empty text field)
- Conditions:** Add Filter Condition | Add "OR" Clause
- Frequency:** (Dropdown menu set to 'N') | Compliance | 1s | 60S | 10M | 1h
- Retention:** 30S
- Host:** Group-01
- Folder structure:**
 - Folder: (Dropdown menu set to 'logs')
 - Folder Structure Requirement: (Text area containing a blue tip box)

Folder Structure Requirement Tip: Stores contract documents in the folder path. Set up this folder requirement using a combination of date, size and optionally, generated text from the contract ID field. For example: /logs/Contract/ContractID/number/

At the bottom of the configuration page are 'Save' and 'Cancel' buttons.

≡ List

L00001128

⌵

Details

TOI

⌵

Priority

Status

Assignee

High

Assigned

legal.futurer

Start Work

Details

Documents (3)

Document Access (30)

Legal Matters

Approvers

Task SLAs (1)

Documents

⌵

Last referenced path item:

Name

js-cheatsheet11.pdf

https://drive.google.com/file/d/1DfWwGgUjZtYkQmKqJzYkQmKqJzYkQmKq/view?usp=sharing

legal.futurer

2022-04-11 04:41:02

Uploaded

js-cheatsheet7.pdf

https://drive.google.com/file/d/1DfWwGgUjZtYkQmKqJzYkQmKqJzYkQmKq/view?usp=sharing

legal.user

2022-04-11 04:37:56

Uploaded

js-cheatsheet8.pdf

https://drive.google.com/file/d/1DfWwGgUjZtYkQmKqJzYkQmKqJzYkQmKq/view?usp=sharing

legal.user

2022-04-11 04:37:56

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Details

Attach





now

🏠 **LIST** 180001228

Details

TOI  **Priority** **Assigned** **Assigned** **Legal Matters** **Start Work** **Create Matter**

Details **Documents (4)** **Document Access (30)** **Legal Matters** **Approvals** **Task SLAs (1)**

Document Access    

Last refreshed: 10:00 AM

<input type="checkbox"/>	User	Role	Status	Created	Updated
<input type="checkbox"/>	Elisabeth Johnson	Read	Not Processed	2022-04-13 04:38:11	2022-04-11 04:38:11
<input type="checkbox"/>	Mary Anderson	Read	Not Processed	2022-04-11 04:38:11	2022-04-11 04:38:11
<input type="checkbox"/>	Markus Ellinger	Read	Not Processed	2022-04-13 04:38:11	2022-04-11 04:38:11
<input type="checkbox"/>	and Jöföler	Read	Not Processed	2022-04-13 04:38:11	2022-04-11 04:38:11
<input type="checkbox"/>	Alan Giering	Read	Not Processed	2022-04-11 04:38:11	2022-04-11 04:38:11
<input type="checkbox"/>	Linda Bracke	Read	Not Processed	2022-04-13 04:38:11	2022-04-13 04:38:11

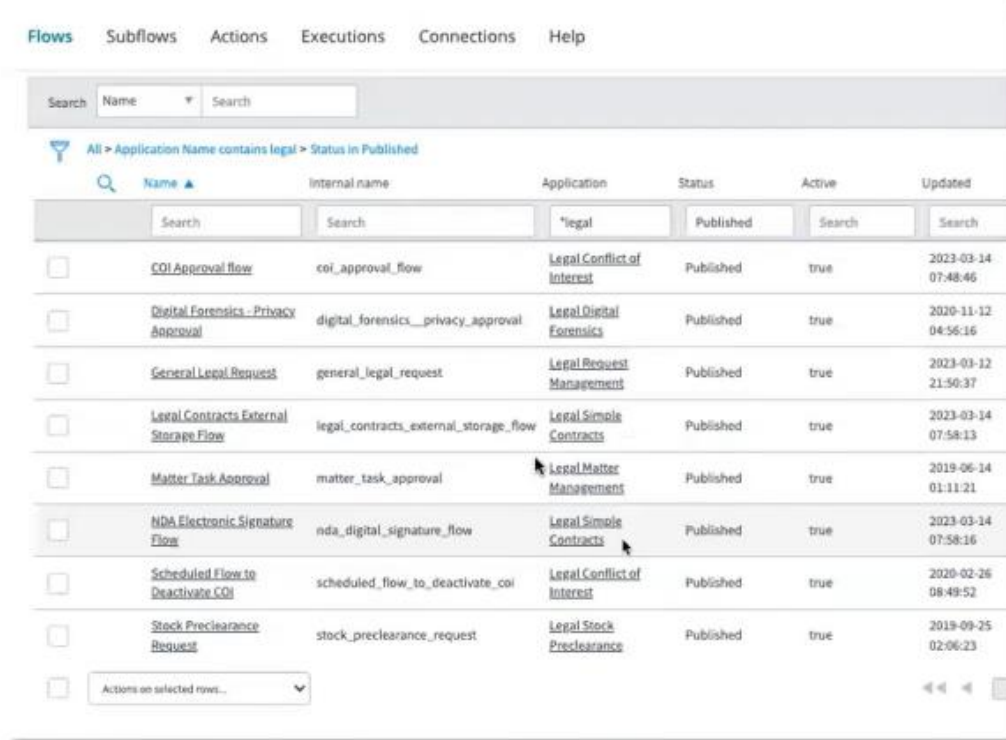
Click on the user name to view the user's profile.

Counsel Assist **Q. 110**

Legal Request Management

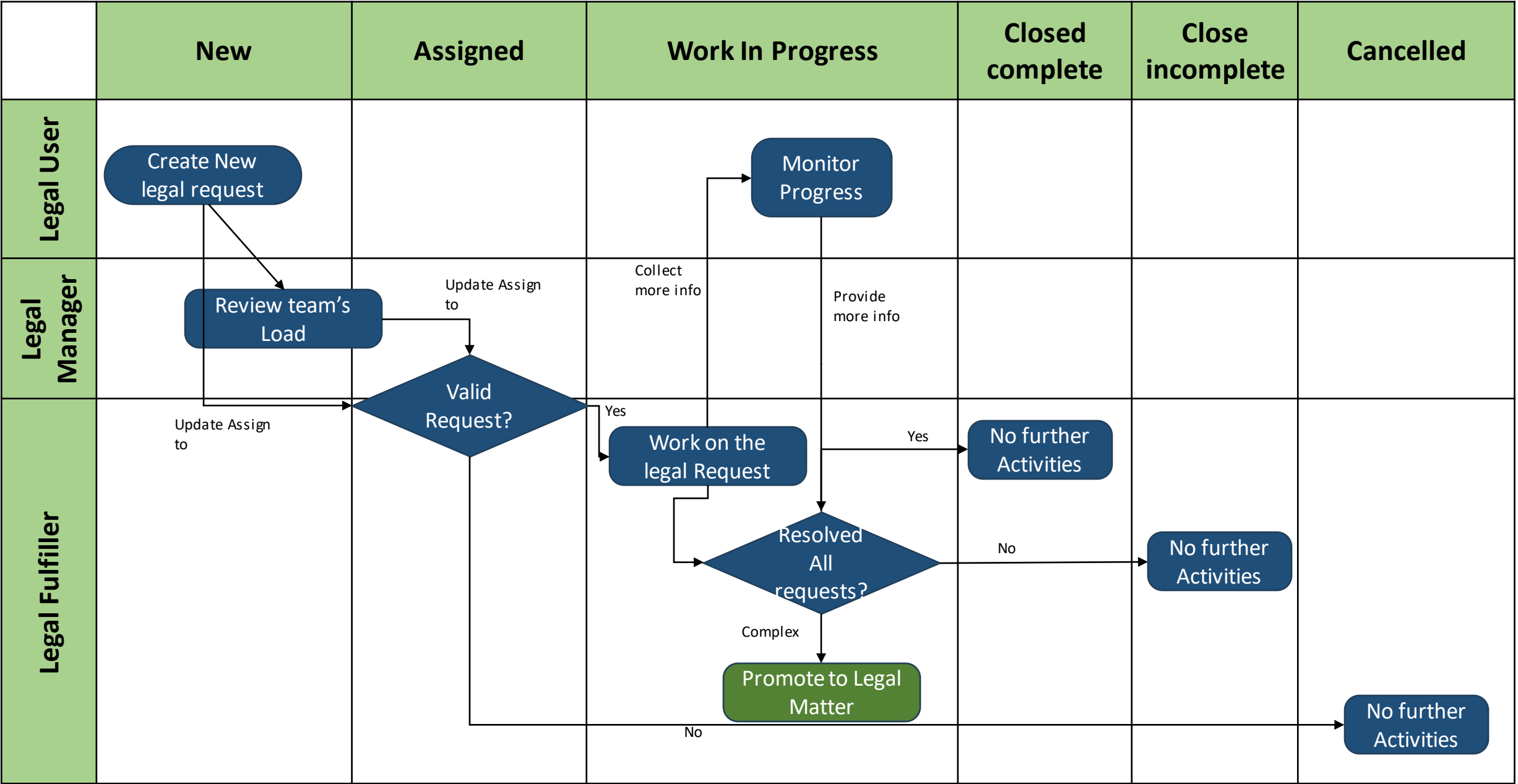
Configurations Items

- **Notifications** Configure notifications to be sent when various events occur.
- **Assignment Rules** Assignment rule for an intake form to assign the associated legal request and matter to a legal group or user.
- **Legal Knowledge Base** (For request deflection): Create Knowledge articles in delivered Legal Knowledge Bases, Categories or create new ones as need as a Level 0 support mechanism.
- **Response Templates** Create or modify a response template with a reusable message that legal fulfillers can use to send users quick and consistent messages.
[Documentation Link.](#)
- **Modify/ review/ Create Flows** When using a Legal Practice App, modify/ review the delivered workflow to align with your organization's legal process.



Flows						
Subflows Actions Executions Connections Help						
Search <input type="text" value="Name"/> <input type="text" value="Search"/>						
All > Application Name contains legal > Status in Published						
Name Internal name Application Status Active Updated						
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="*legal"/>	<input type="text" value="Published"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	
<input type="checkbox"/>	COI Approval flow	coi_approval_flow	Legal Conflict of Interest	Published	true	2023-03-14 07:48:46
<input type="checkbox"/>	Digital Forensics - Privacy Approval	digital_forensics_privacy_approval	Legal Digital Forensics	Published	true	2020-11-12 04:56:16
<input type="checkbox"/>	General Legal Request	general_legal_request	Legal Request Management	Published	true	2023-03-12 21:50:37
<input type="checkbox"/>	Legal Contracts External Storage Flow	legal_contracts_external_storage_flow	Legal Simple Contracts	Published	true	2023-03-14 07:58:13
<input type="checkbox"/>	Matter Task Approval	matter_task_approval	Legal Matter Management	Published	true	2019-06-14 01:11:21
<input type="checkbox"/>	NDA Electronic Signature Flow	nda_digital_signature_flow	Legal Simple Contracts	Published	true	2023-03-14 07:58:16
<input type="checkbox"/>	Scheduled Flow to Deactivate COI	scheduled_flow_to_deactivate_coi	Legal Conflict of Interest	Published	true	2020-02-26 08:49:52
<input type="checkbox"/>	Stock Preclearance Request	stock_preclearance_request	Legal Stock Preclearance	Published	true	2019-09-25 02:06:23
<input type="checkbox"/>	Actions on selected rows...					

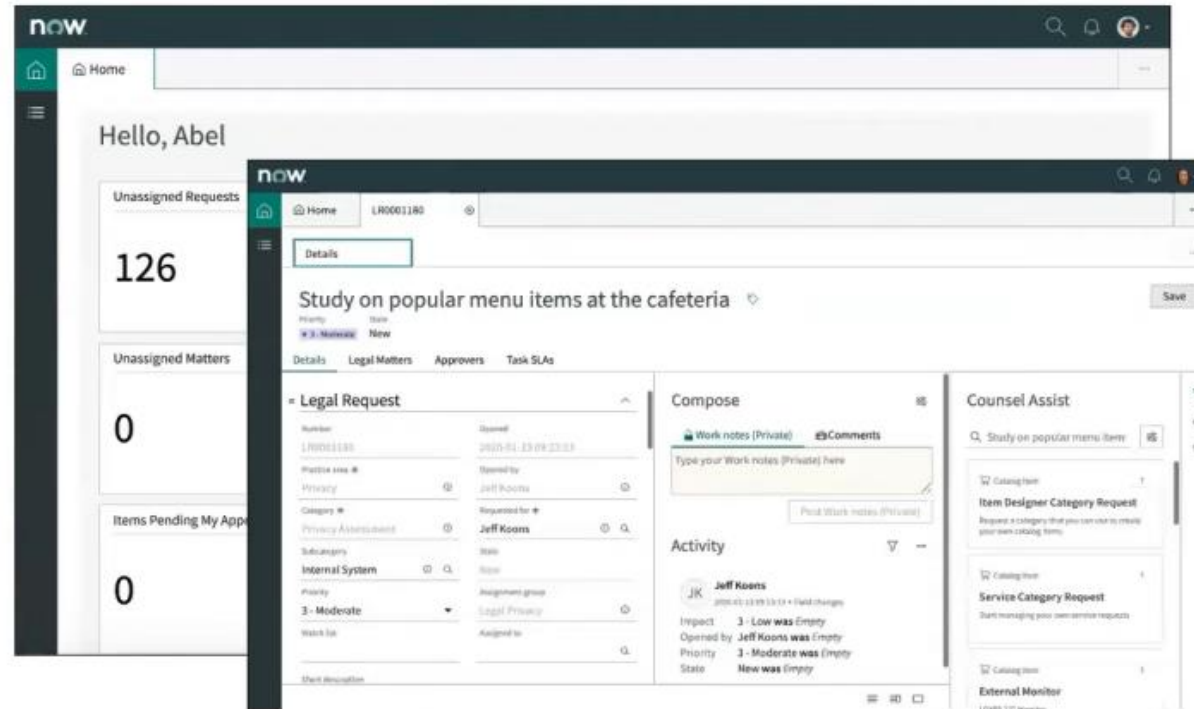
General Life Cycle of LSD



Legal counsel center

Simplify and automate service practitioner experience

Plugins needed: Legal Counsel Center (sn_lg_workspace) application



Outcomes

Move from unstructured email tasks to automated workflows

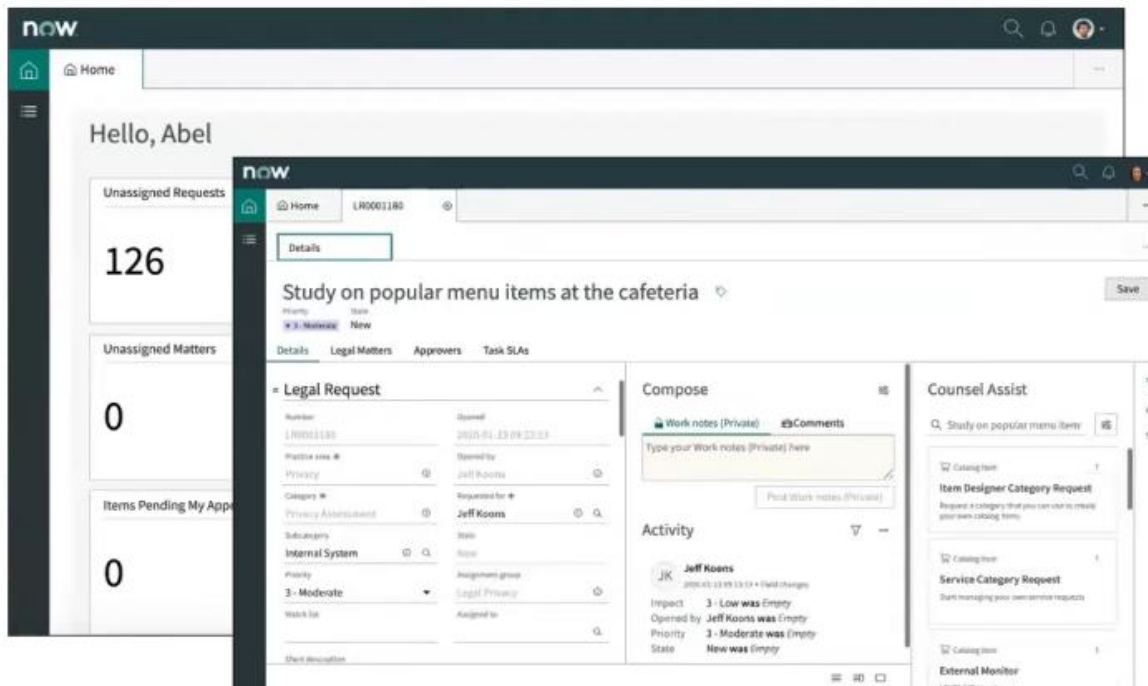
Automatically categorizes and assigns legal requests for rapid response

Work on multiple requests and legal matters concurrently with an optimized counsel center

Legal counsel center

Simplify and automate service practitioner experience

Plugins needed: Legal Counsel Center (sn_lg_workspace) application



Outcomes

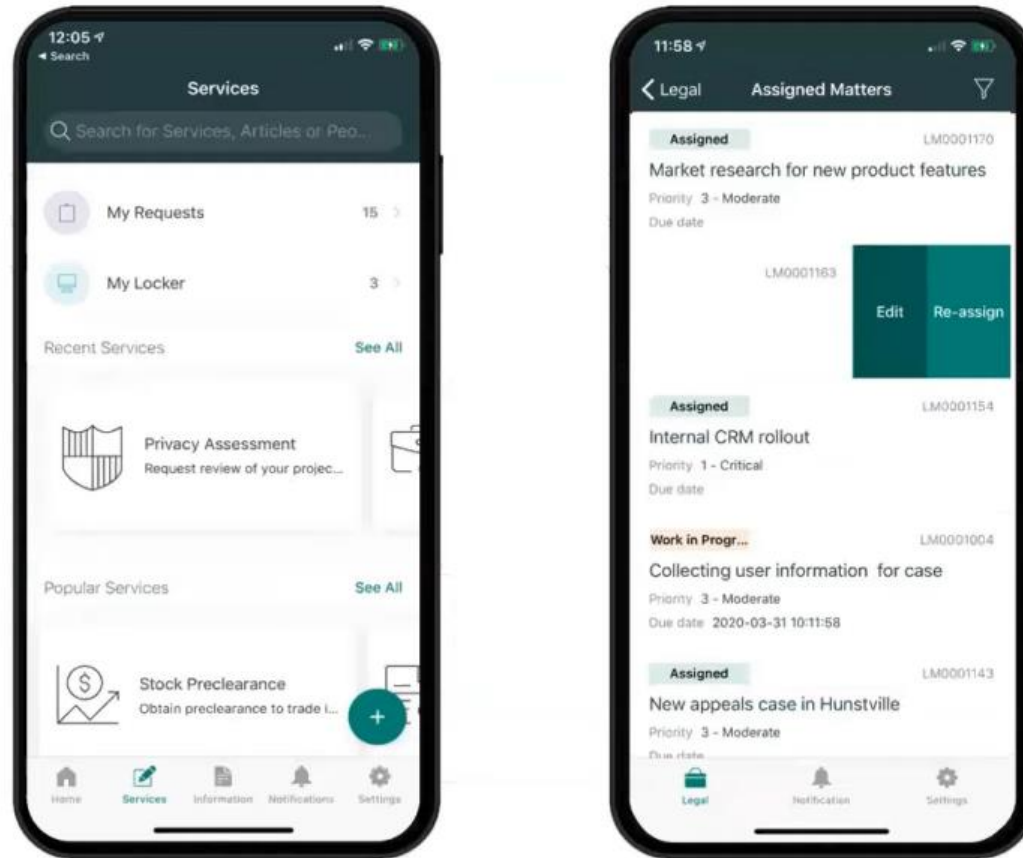
Move from unstructured email tasks to automated workflows

Automatically categorizes and assigns legal requests for rapid response

Work on multiple requests and legal matters concurrently with an optimized counsel center

Native mobile apps

Help employees and legal teams get work done anywhere



Outcomes

Legal Self-service with a click or a swipe

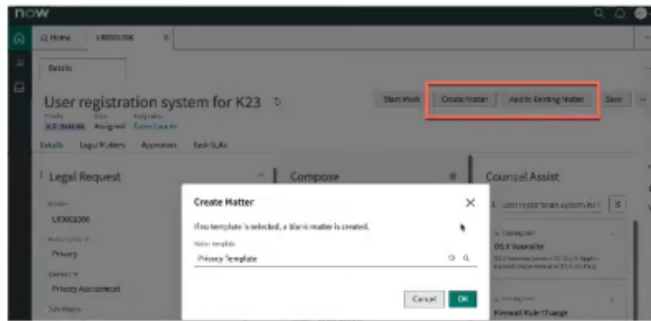
Act on approvals and to-dos

Quickly view and respond to tasks on the go

LEGAL MATTER MANAGEMENT

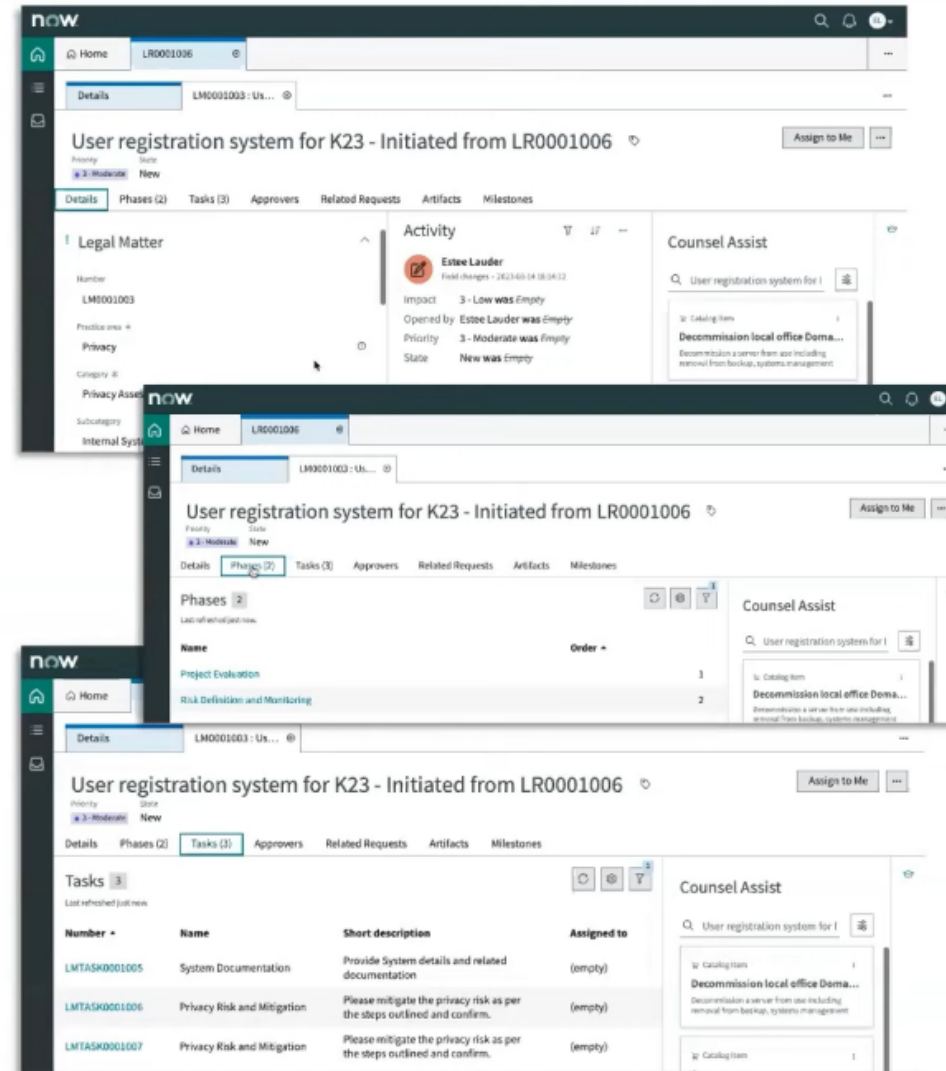
Legal Matter Management

- A Legal Matter is created when additional collaboration, cross-functional tasks, task tracking, document storage is needed to resolve a matter.
- You can create a legal matter in two ways:
 - A legal request can be promoted to a legal matter if the request needs additional investigation and substantial time to work on.



- A practice area lead can create a legal matter directly. These matters do not have any parent legal request though related requests can be added to them.
- A Legal Matter can have Tasks, Phases, Milestones, Artifacts, as well as related Legal Requests associated to it.

[Documentation Link](#)



Legal Matter Management

Configurations Items

- **Matter Templates**

- When a new Legal Matter is created, or a Legal Request is promoted to a Legal Matter, the legal ops team can be given an option of selecting a Matter Template.
- The Matter Template can be used to create pre-defined Tasks, Phases.
- Matter Templates are used to standardize legal procedures for handling legal matters.
- A matter template needs to be approved and published before it can be applied to subsequent Legal Matters.

[Documentation Link](#)

The image displays two screenshots from a Legal Matter Management system. The top screenshot shows the 'Matter Template Configuration' interface. It includes a 'Matter Defaults' section with a table for 'LegalMatterTemplate' and a 'Values that are pre-set when a matter record is created.' annotation. The bottom screenshot shows a 'Legal Matter - Demo' view. A green arrow points from the 'Matter Defaults' section to the 'Legal Matter' view. In the 'Legal Matter' view, the 'Priority' is set to 'High', and a red arrow points to this value with the annotation 'Set from Matter Template'.

Values that are pre-set when a matter record is created.

Set from Matter Template

Legal Matter Management

Configurations Items

- **Matter Phases** A phase can be created in a Matter Template to standardize procedures for handling legal matters.

The first screenshot shows the 'Matter Template' configuration page. It includes fields for 'Number' (LMTPT0001), 'Name' (Investigations), and 'Status' (Draft). Below these are 'Matter Defaults' and a table for 'Phases'. The second screenshot shows the 'Matter Phase Template' configuration page for 'Fact Collection'. It includes fields for 'Number' (LMTSKTPL00109) and 'Name' (Fact Collection). The third screenshot shows the 'Legal Matter - Demo' details page. It includes fields for 'Priority' (2-High), 'Due date' (2023-03-30 17:00:00), 'Status' (Assigned), and 'Matter owner' (Amedeo Avogadro). Below these are tabs for 'Details', 'Phases (2)', 'Tasks (2)', 'Approvers', 'Related Requests', and 'Artifacts'. The 'Phases (2)' tab is active, showing a list of phases: 'Fact Collection' and 'Recommendation and Remediation'.

- **Matter Task Templates** A Task Template is created to standardize a task that is associated to a Legal Matter Phase.

The first screenshot shows the 'Matter Template' configuration page. It includes fields for 'Number' (LMTPT0001), 'Name' (Investigations), and 'Status' (Draft). Below these are 'Matter Defaults' and a table for 'Phases'. The second screenshot shows the 'Matter Task Template' configuration page for 'Interview Subject'. It includes fields for 'Number' (LMTSKTPL00003), 'Name' (Interview Subject), and 'Phase' (Fact Collection). Below these are 'Task Defaults' and a table for 'Checklist'. The third screenshot shows the 'Legal Matter - Demo' details page. It includes fields for 'Priority' (2-High), 'Due date' (2023-03-30 17:00:00), 'Status' (Assigned), and 'Matter owner' (Amedeo Avogadro). Below these are tabs for 'Details', 'Phases (2)', 'Tasks (2)', 'Approvers', 'Related Requests', 'Artifacts', and 'Milestones'. The 'Tasks (2)' tab is active, showing a list of tasks: 'Interview Subject' and 'Remediation Plan 1'.

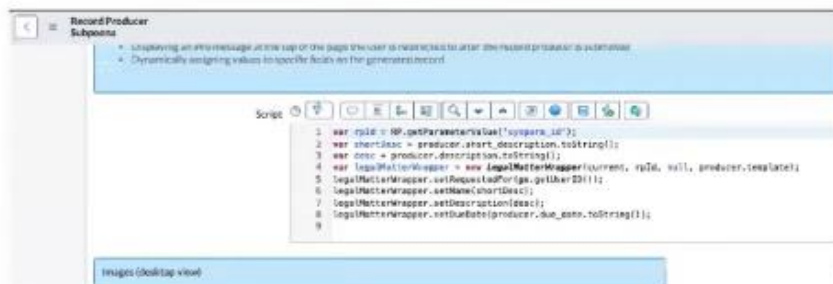
Values that are pre-set when a matter is created.

Checklists can be created as a part of the matter.

Legal Matter Management

Configurations Items

- **Record Producer** If a record Producer is created and associated to an Intake form for matter, it must be built on the Legal Matter (or an extended Practice Area) table.
- A template variable can created to allow the Legal Ops team to choose the template for this matter.
- A script such as as the one below, using *legalMatterWrapper* object can be used to associate the selected template to the that matter this is created. This script can be used to populated



The image displays the 'Subpoena' form and its configuration. The form includes a 'Request Details' section with a 'Template' dropdown and a 'Due date' field. The configuration window shows the 'Type Specifications' tab, which defines the 'Subpoena' type with various attributes and conditions.

Subpoena Form:

- Request Details:** Template (dropdown), Due date (YYYY-MM-DD).
- Subpoena Details:** Issued date (YYYY-MM-DD), Jurisdiction, Court, Requesting attorney.

Configuration (Type Specifications):

- Application:** Legal Matter Management
- Map to field:** Due (Reference), Subpoena (Order 150)
- Values specific to this variable Test:** Variable Width: 100%, Not Included in 2 columns configuration.
- Reference:** Matter Template (ref_id_matter_template)
- Reference qualifier:** Simple
- Reference qualifier condition:** All of these conditions must be met:
 - Action: is true
 - State: is Published
 - Intake form mapping: is Subpoena

Legal Matter Management

Configurations Items

- **Intake Forms** Intake forms can be created for Legal Ops team to create Matters, similar to Legal Requests.
- Record Producers built on the Practice Area table extending Legal matters are associated to Legal Intake forms related to matter.
- If a Legal Request can be promoted to matter, select 'Request and Matter' in the type field and link to the Request Record Producer.
- A default matter template as well as applicable matter template for this Intake form can be specified.

Intake Form Subpoena

Name: Subpoena Practice area: Employment

Default subcategory: Production of Evidence

Short description:

Record Producer

Select a record producer type to associate with the intake form.

1. You can associate an existing record producer or create a record producer using the related link.
2. When you create a record producer using the related link, it is populated with default values in the mandatory fields. You must open the record producer to update these fields and add icon and variables.
3. To enable creation of legal matter from a request, select the Request and Matter option in the Type field.

Type: Matter

Matter record producer: Subpoena

Default matter template:

Options:

Checklist:

Update Delete

Subcategories (2) SLA Definitions Assignment Rules (1) **Matter Templates (2)**

Intake form mapping - Subpoena

Number	Name	State	Updated
LMTPL00001	Investigations	Published	2020-03-14 22:49:14
LMTPL00002	e-discovery	Published	2020-03-14 22:49:14

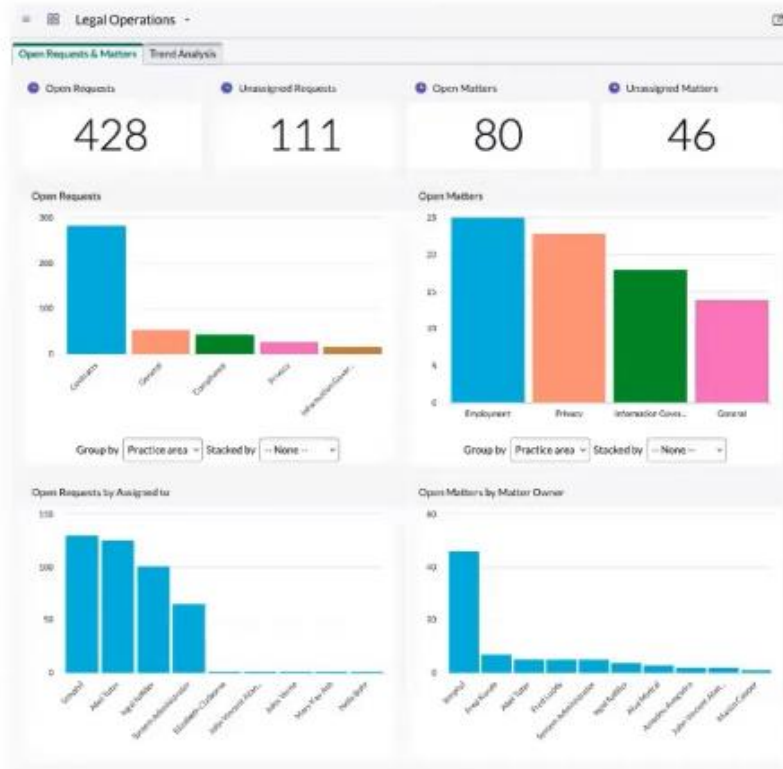
1 to 2 of 2

Legal Operations Dashboard

Persona: Legal Department

The Legal Operations dashboard provides comprehensive reports to the legal department. The dashboard uses Performance Analytics to provide reports and metrics on legal requests and legal matters.

[Documentation Link](#)



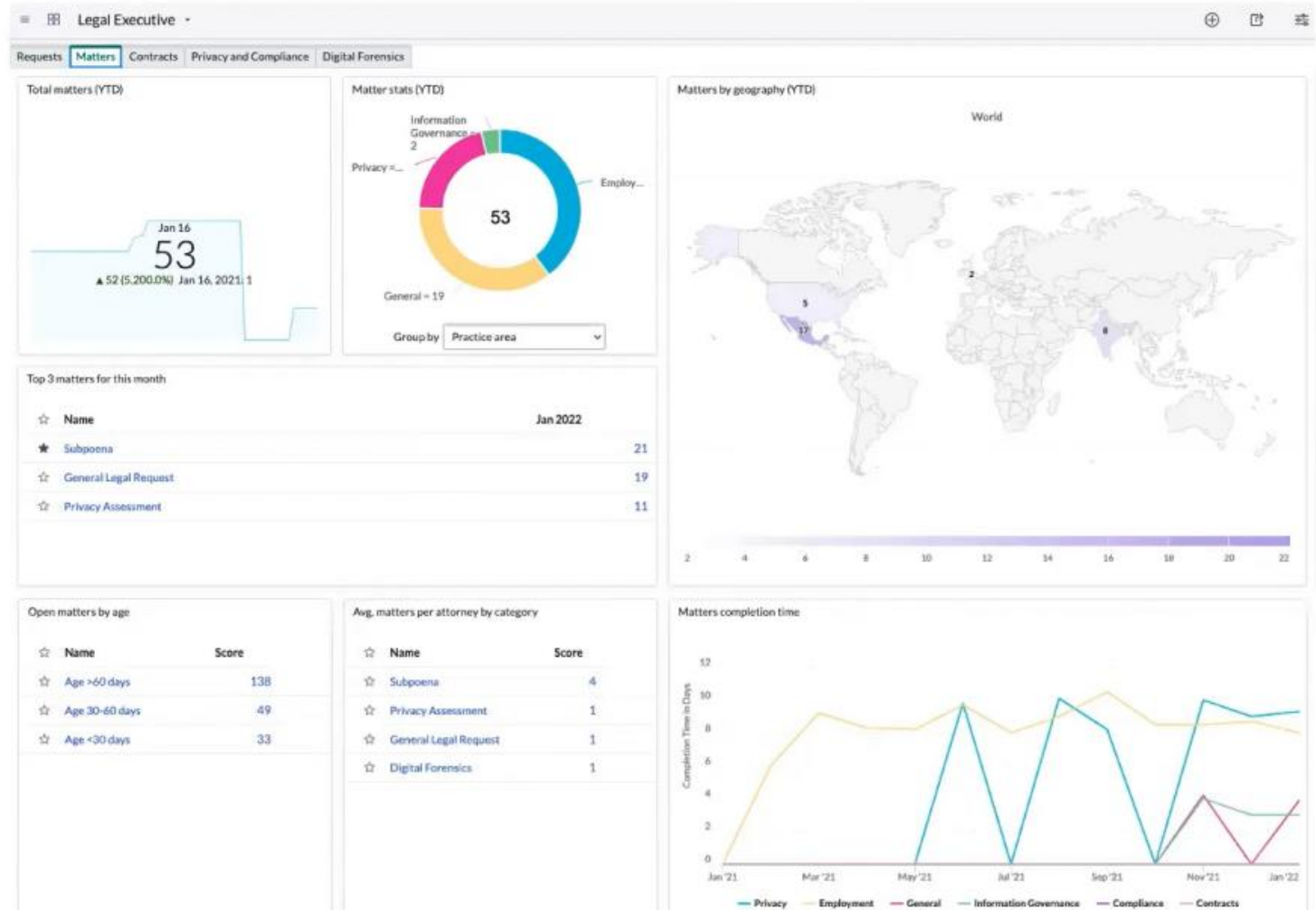
Legal Executive Dashboard

Persona: Legal Executives, Practice Area Leads, General Counsel

[Documentation Link](#)

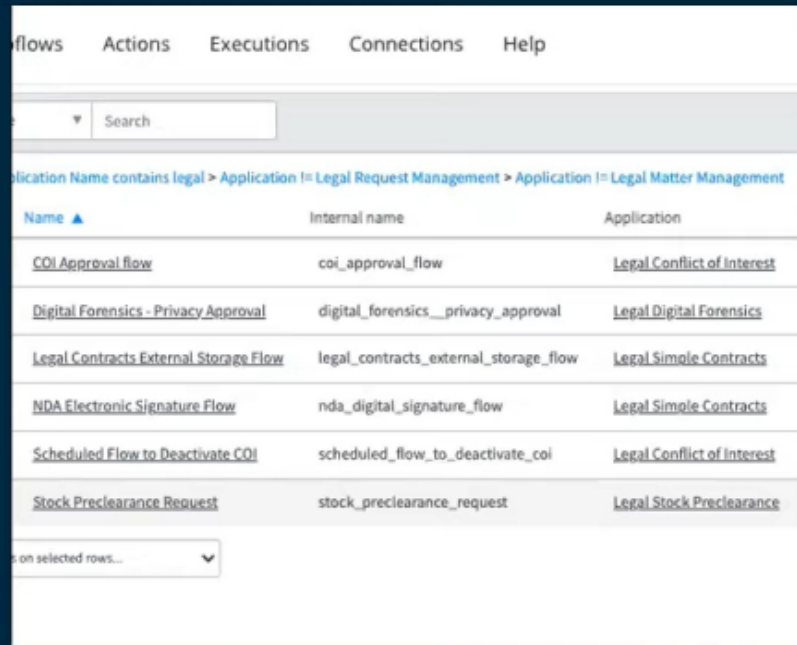
As an executive I can get a birds eye view of the nature and volume work the team is doing and understand the trends related to Legal requests and Legal Matter to make informed business decisions.

Case Study: [How ServiceNow transforms its legal operation.](#)



Legal practice apps

Leverage industry expertise to configure and deploy fast



The screenshot shows a web application interface with a top navigation bar containing 'Flows', 'Actions', 'Executions', 'Connections', and 'Help'. Below the navigation bar is a search bar with a dropdown arrow and the text 'Search'. A breadcrumb trail reads: 'Application Name contains legal > Application != Legal Request Management > Application != Legal Matter Management'. The main content area is a table with three columns: 'Name', 'Internal name', and 'Application'. The table lists several workflows, each with a link in the 'Name' column. At the bottom of the table, there is a dropdown menu with the text 'on selected rows...'.

Name	Internal name	Application
COI Approval flow	coi_approval_flow	Legal Conflict of Interest
Digital Forensics - Privacy Approval	digital_forensics__privacy_approval	Legal Digital Forensics
Legal Contracts External Storage Flow	legal_contracts_external_storage_flow	Legal Simple Contracts
NDA Electronic Signature Flow	nda_digital_signature_flow	Legal Simple Contracts
Scheduled Flow to Deactivate COI	scheduled_flow_to_deactivate_coi	Legal Conflict of Interest
Stock Preclearance Request	stock_preclearance_request	Legal Stock Preclearance

←-----> **Digital Forensics**

←-----> **Investigations**

←-----> **Stock Pre-Clearance**

←-----> **Conflict of Interest**

←-----> **Simple Contracts**

Outcomes

Faster time to value with
Industry best practice
workflows

Leverage Now Platform
from self-service request
to service delivery

Prioritize legal
transformation based on
real scenarios

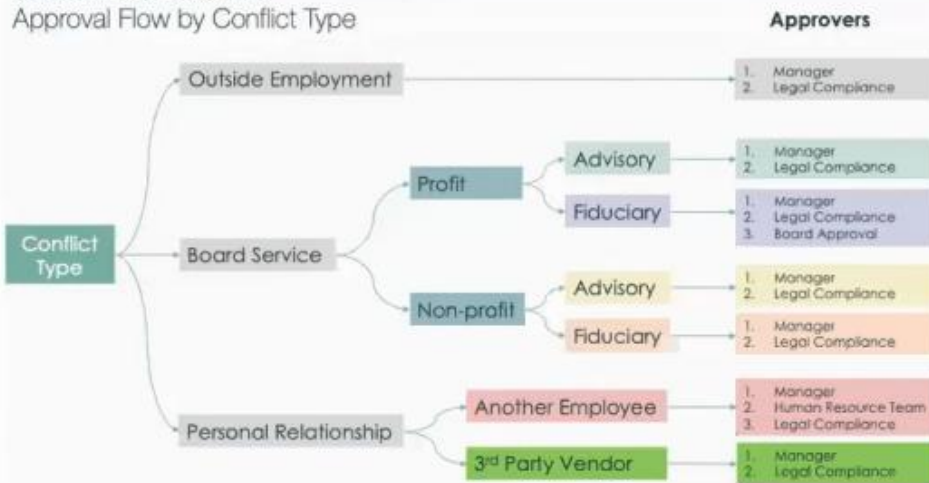
Practice Area Apps

Legal Conflict of Interest

Manage the disclosure, approval, and registry of conflict of interest that might arise from employees having competing interests or loyalties.

Conflict of Interest

Approval Flow by Conflict Type



[Documentation Link](#)

[NowCreate Deployment Guide](#)

servicenow

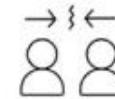
Workflow:
Conflict of Interest

Legal > Legal Operations Catalog > Legal Requests > Conflict of Interest Disclosure

Here's an example workflow for an employee disclosing outside employment.

Conflict of Interest Disclosure

Request for legal clearance of potential conflicts of interest.



Submit a request for legal clearance of potential conflicts arising from secondary employment, board service, or personal relationships.

Employee chooses the conflict type

Employee completes and submits the form

The request enters on approval workflow

The request is approved or denied

The decision is emailed to employee

A record is generated automatically

Practice Area Apps

Legal Digital Forensics

Handle digital forensics requests for data discovery related to custodial and non-custodial data sources that are subject to investigations or litigation.

Key Features

- Intake form to gather request background, custodial and non-custodial data sources with keywords and filter dates.
- Flagging of **e-discovery data sources** with instructions for data processing.
- Integrated privacy approval flow to get the required approvals before starting the investigation.
- Pre-defined standard digital forensic tasks using a template.
- Record and audit trail of all activities done in support of the investigation and litigation.

[Documentation Link](#)

[NowCreate Deployment Guide](#)

Workflow: Digital Forensics Request

Legal > Legal Operations Catalog > Legal Requests > Information Governance > Digital Forensics Request

Here's an example workflow to request data discovery related for custodial and non-custodial data sources that are subject to investigation or litigation.



Set up the following items in the application:

- 1) List of data sources for e-discovery
- 2) Privacy approval workflows
- 3) Digital Forensics matter template

After setup, here's what the workflow looks like:



Practice Area Apps

Legal Investigations

Enables Legal departments to accept complaints from a simple intake process through multiple channels. The app standardizes the investigations workflow.

Key Features

- Multi-channel intake process including Legal Service Portal, Employee Center portal, and **Anonymous Report Center (ARC) portal**.
- Option for submitting anonymous or named complaints.
- Pre-configured Intake form
- **Interview Templates**
- Allegation Types/ Subtypes

For interdepartmental transfer of complaints between Legal and HR departments, see Better together solution: [Legal Investigations and HR Service Delivery Employee Relations](#)

[Documentation Link](#)

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[NowCreate Starter Stories](#)

Legal Investigations workflow

Enable the Legal department to accept complaints from a simple intake process through multiple channels. The legal team can organize and conduct detailed legal investigations including interviews, gathering evidence, and preparing final reports along with recommended actions.



Setup the following items

- ✓ Configure allegation types and allegation subtypes.
- ✓ (Optional) Install the Anonymous Reporting Center plugin to enable submitting complaints to Legal anonymously.
- ✓ (Optional) Install the Interview Templates plugin to enable configuring interview templates for conducting interviews.

▶ Employee submits a complaint with details like complaint type, involved party, description and date of the incident.

▶ Legal request fulfiller assesses the complaint and, if required, promotes it to a legal matter for detailed investigation.

▶ Matter fulfiller conducts the legal investigations that might include:

▶ Adding more involved parties as a witness, the subject or allegation, etc.

▶ Associating more allegations against any of the involved parties.

▶ Conducting interviews with the involved parties.

▶ Gathering evidences, documenting and storing them in the legal matter them in the legal matter.

▶ Matter fulfiller prepares final report and recommended actions.

▶ Matter fulfiller closes the legal matter and legal request as required.

Ethics Complaints

Report ethics complaints via the Legal Service Portal or the Anonymous Reporting Center.



Ethics complaints can include bribery, accounting or financial fraud, insider trading, or other issues, and other ethical violations. If you suspect an incident of any of these violations, please report it and provide a detailed description of the incident. Please note that the information you submit will be kept confidential. We will review the incident and take the next relevant steps, which may include an investigation, as per our policy.

* Indication required

* Complaint type

* Detailed description

Involved parties

Submit

Actions: Involved party type Internal party name External party name Status Notes Created

No data to display

* Provide the approximate date and time of the incident (format: dd/mm/yyyy)

10/01/2020 10:00:00

Attachments

Practice Area Apps

Legal Simple Contracts

Enables employees to submit legal requests for the creation or review of contracts with third parties, such as vendors, customers, and partners.

Key Features

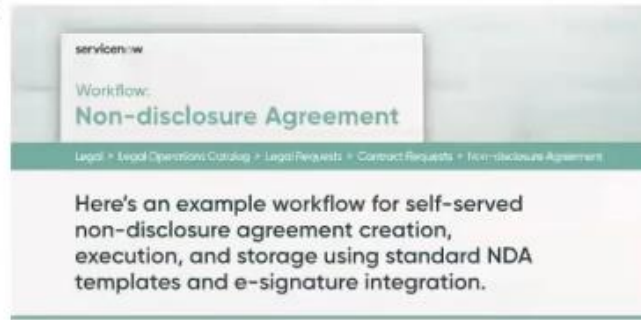
- Document templates for standard contract documents such as Non-disclosure Agreements (NDA). **Create template blocks to replace text based on conditions in the document templates.**
- **Integration with Microsoft Dynamics CRM** to pull sales representatives and associated sales accounts and active opportunities data.
- **Integration with electronic signature** providers such as DocuSign and Adobe Sign.
- **Integration with external storage providers** such as Box, Google Drive, and Microsoft OneDrive to store final signed contract documents.
- Centralized repository of all signed and signed contract documents.

Practice Area Apps

Legal Simple Contracts

We current support for the following contract requests OOB:

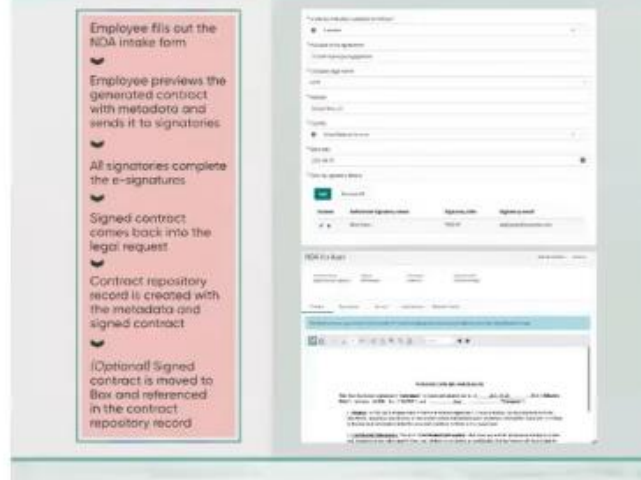
- [Non-disclosure agreement requests](#)
- [Sales contract review requests](#)
- [Third-party contract review requests](#)



Set up the following items in the application:

- 1) Multiple variations of NDA templates
- 2) Template selection rule to choose the right template based on the legal request
- 3) Internal signatories for different templates
- 4) E-signature integration - Adobe Sign or DocuSign
- 5) (Optional) Integration with Box as external storage to store signed contracts

After setup, here's what the workflow looks like:



Sales Contract Review Request workflow

Sales team members can submit legal requests for sales contract reviews when they have to engage legal counsel for customer queries, review the terms and conditions provided by customers, or for legal guidance. The commercial legal team can review the sales contract and provide the requested contract support.



Setup the following items in the application

- Configure Microsoft Dynamics CRM to import the sales representatives, sales accounts, and active opportunities data.
- Configure deflection, based on specified conditions, that will provide guidance to sales persons.
- (Optional) Integration with external storage provider to store signed contracts.

Employee fills out the sales contract form with details like **Sales account** and **Opportunity**, that is pulled from the CRM system.

(Optional) Employees upload sales contract document.

System checks for deflection rules to provide legal guidance based on the entered information.

If no deflection rules match, then the legal request is submitted.

If the deflection rules match, preconfigured legal guidance, appears.

Follow the guidance and cancel submission.

To get more guidance, provide business justification and submit the request.

(Optional) Fulfiler obtains ad hoc approval from stakeholders for documents.

Fulfiler makes necessary revisions to the document and uploads it to the request.

The sales contract document is ready to be signed.



Submit a request for a sales contract when you have customer questions, need to engage legal counsel, or need a review of terms and conditions given by customers.

*What does your request involve?

1 Data Processing Agreement

*Account

1 A External Consultant

Opportunity

1 2 Generalist Business Manager for A

Opportunity

1 2 Generalist Business Manager for A

Deal closure date

2022-03-04

Additional information

Add attachments

Reference List

- Legal Service Delivery Application Video
 - ❖ https://www.youtube.com/watch?v=FVzkyUIM5rE&t=1664s&ab_channel=ServiceNowCommunity
- Legal Service Delivery Documentation.
 - ❖ <https://docs.servicenow.com/bundle/washingtondc-employee-service-management/page/product/legal-request-management/concept/legal-management-overview.html>