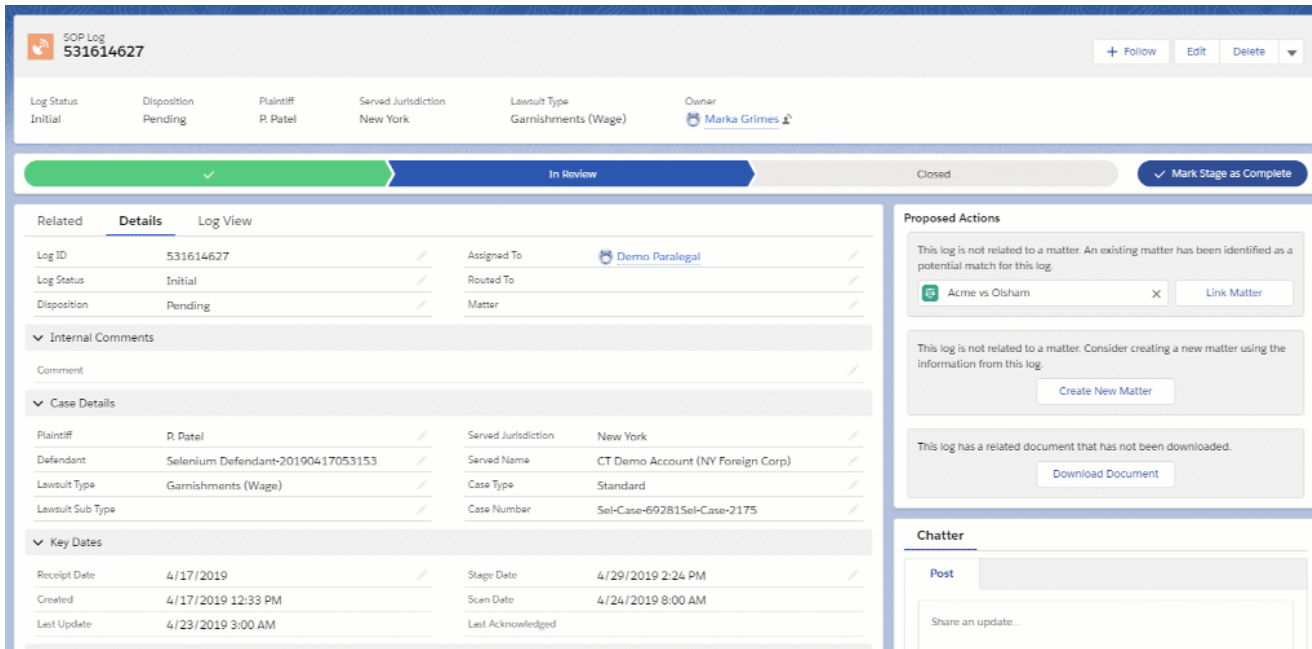


Working With an SOP Log

The SOP Log view provides access to information and actions relevant to the underlying log record. This page layout and the underlying data can be customized to suit specific use case scenarios.



The screenshot displays the SOP Log view for log ID 531614627. The interface includes a header with the log ID and a status bar with buttons for Follow, Edit, and Delete. Below the header, a progress bar shows the current stage as 'In Review'. The main content area is divided into three sections: 'Related' (Log ID, Log Status, Disposition), 'Details' (Internal Comments, Case Details, Key Dates), and 'Log View' (Assigned To, Routed To, Matter). The 'Details' section is expanded, showing case details like Plaintiff (D. Patel), Defendant (Selenium Defendant-20190417053153), Lawsuit Type (Garnishments (Wage)), and Key Dates (Receipt Date, Created, Last Update, Stage Date, Scan Date, Last Acknowledged). The 'Proposed Actions' section on the right offers options to Link Matter, Create New Matter, and Download Document. The 'Chatter' section at the bottom allows for posting updates.

SOP Log Details

The fields on the details tab can be used in list views, reports, and within workflow processes.

- **General information** - The fields in this area uniquely identify the SOP Log and provide relevant details of the SOP's workflow status.
- **Case Details** - The following case details represent the values defined by and provided to the integration from the CT Service of Process. For this reason, these fields would not typically be modified.
- **Key Dates** - This area contains relevant date details for the underlying SOP. With the exception of *Scan Date*, these dates are managed by the CT Service of Process.

SOP Log View

The SOP Log View displays additional detailed information regarding the SOP Log provided by the CT Service of Process. This information can be used for default values

when creating new matters in AdvoLogix. Fields on this view may not be available for list views, reports, or within workflow processes.

Related Lists

This area displays related lists of information relevant to the underlying SOP Log.

- **Files** - Provides a list of files related to the underlying record. This list will include the file downloaded from the CT SOP Log.
- **Notes** - Provides an optional way to track information relative to an SOP Log.
- **Acknowledgements** - Contains a list of Acknowledgements relevant to the underlying SOP Log.

SOP Log Proposed Actions (Lightning Component)

The actions listed under proposed actions are dynamically determined by the current state of the SOP Log. These actions are intended as suggestions for streamlining the SOP review process. Potential proposed actions include:

- **Link to Matter** - This action allows the user to quickly link the underlying SOP Log to an existing matter. When possible, AdvoLogix will suggest a matter based on the log's Case Number.
- **Create Matter** - This action allows the end user to quickly create a new matter using the underlying log information. Field mapping templates allow organizations to map fields between the SOP Log and an AdvoLogix matter.
- **Update Matter** - This action enables the user to transfer SOP updates to an existing matter. This process is also useful for comparing an SOP Log to the related matter.
- **Download Document** - This action is available when the related SOP document has not been previously downloaded.
- **Submit for Acknowledgement & Get Acknowledgement Status** - This action is available when the logged-in user has permissions to acknowledge SOP Logs and using the *Submit for Acknowledgement* action button a fresh acknowledgement can be generated.

Use the *Get Acknowledgement Status* action button to refresh latest status available from CT for the latest acknowledgement available on the SOP Log.



The *Get Acknowledgement Status* action button is the manual way for refreshing latest status from CT the acknowledgement status however will be automatically refreshed from CT by AdvoLogix background services as well.

SOP Log Page Layout Buttons

The following buttons are available within the SOP Log detail view. Organizations may choose to include or exclude these buttons in accordance with their business process.

- **Create Matter** - This button allows the end user to quickly create a new matter using the underlying log information. Field mapping templates allow organizations to map fields between the SOP Log and an AdvoLogix matter.
- **Update Matter** - This button enables the user to transfer SOP updates to an existing matter. This process is also useful for comparing an SOP Log to the related matter.
- **Download Document** - Connects to CT and downloads the document related to the SOP Log. This option can be removed and is most relevant when your organization has not opted to automatically download documents from CT.
- **Acknowledge** - Connects to CT and submits an Acknowledgement for the underlying SOP Log.

Chatter

Chatter allows users to collaborate in context with the SOP Log they are discussing. Review [this article](#) for more information on using Chatter.



Files, Notes and Chatter are standard platform objects.