

# MITRATECH

## **Lawtrac® 4.0**

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## DocSave Guide

## Lawtrac 4.0 DocSave Guide

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# Acknowledgements

This product includes software developed by the following organizations:

Apache Software Foundation (<http://www.apache.org/>)

OpenSymphony Group (<http://www.opensymphony.com/>).

The license agreements for these and other supplemental software packages can be found in your installation media in subfolder Supplemental\_Software\_Licenses. That subfolder also contains Open Source Components.pdf, which lists the locations, license types, and specific versions of components that are available on the web.

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# 1 Docsave User Guide

Lawtrac Docsave includes a robust, integrated Outlook interface that enables Outlook users to attach emails to matters within Lawtrac, saving time and generating value. Microsoft Word integration also allows users to check documents in and out, supporting collaboration.

**Warning:** Lawtrac's Office plug-ins are not certified to work on Microsoft Windows 10, and users may experience performance defects when using Docsave on this operating system and platform.

**Note:** Lawtrac's Docsave is optimized for Microsoft Word and Outlook product versions 2003, 2007, and 2010. If you have a later version than these, we suggest using Lawtrac Connect as an alternative for Outlook use.

## 1.1 Lawtrac Docsave Setup

There are several steps that must be taken to set up Lawtrac Docsave.

<a href="#">FTP Site Setup</a>	An FTP site is required for transferring files from your local machine to Lawtrac.
<a href="#">Lawtrac Docsave Settings</a>	Your Lawtrac site administrator must make adjustments to enable the Docsave feature.
<a href="#">Docsave Drop-down List Setup</a>	Categories and Matter Listing files must be downloaded to create the matter and document category drop-down lists that are available when uploading a document or email.
<a href="#">Installing Docsave</a>	The Docsave installation files are accessible from Lawtrac.

### 1.1.1 FTP Site setup

An FTP site is required for transferring files from your local machine to Lawtrac. If Mitrtech hosts your application, contact the Lawtrac Support Desk at [Support@lawtrac.com](mailto:Support@lawtrac.com) or (800) 453-1698 x100 and request the addition of Docsave to your site. This request prompts the creation of the FTP site as well as the required updates for the FTP settings noted in the following section (Lawtrac Docsave Settings).

If your company hosts Lawtrac in-house, contact your IT Department to request the creation of a FTP site for use with the Docsave feature. If assistance is required, contact the Lawtrac Support Desk at [Support@lawtrac.com](mailto:Support@lawtrac.com) or (800) 453-1698 x100.

### 1.1.2 Lawtrac Docsave Settings

Your Lawtrac site administrator must make the following adjustments to enable the Docsave feature:

- Go to **Application Administration>Document Bank**.
- Select the **Docsave Plug-In** switch to turn the feature on .

The screenshot shows the Lawtrac 4.0 navigation menu with tabs for Legal Department, Finance Options, Key Personnel, Firms & Vendors, Parties & Entities, Matter Maintenance, Document Bank, File Room, Reports, Misc. Settings, and Application & Database. The 'SWITCHES' section is active, displaying four toggle switches: DOCUMENT BANK, DRAG-N-DROP, LAWTRAC CONNECT/DOCSAVE (highlighted with a red arrow), and EMAIL FROM MATTER RECORDS. The right sidebar shows 'BANK ADMINISTRATION' with 'Document Bank Switches' highlighted in a red box.

Docsave Switch

- Select the **Docsave Configuration** link.

The screenshot shows the 'BANK ADMINISTRATION' sidebar menu with the following items: Document Bank Switches (1), Upload Instructions (2), Document Categories (3), Outside Counsel Library (4), Safe File Types (5), Docsave Configuration (6, highlighted with a red box), and Upload Limits (7).

Docsave Configuration Link

This screen is used to input your company's FTP site settings and to give users rights to use this feature. If your application is hosted by Lawtrac, the FTP setting information is entered by Lawtrac Support in the **Lawtrac Docsave Settings** section. If it is hosted in-house, your IT Department must provide this information for entry in this area. No adjustments should be made to the default value entered in the Key Code field.

The screenshot shows the 'Change FTP Information' form with the following fields and values:

FTP ADDRESS:	Lawtracsftp.com
HD DIRECTORY:	\\Lawtutcweb002\LawtracsFTP\La
USER NAME:	Lawtrac30DemoSFTP
PASSWORD:	LTODemo30SFTP
KEY CODE:	AA

A blue button labeled 'Change FTP Information' is located at the bottom right of the form.

FTP Information

Click **Change FTP Information** once the settings are entered. The FTP settings displayed on this screen is visible to all users given rights to use the Docsave feature in the **Individuals with**

**Permission to Use** section of the screen. Place a check to the left of an individual's name if you want them to use the Docsave feature and have access to the FTP settings. Click **Change Users Information** (located at the bottom of the screen) once the users are selected.

INDIVIDUALS WITH PERMISSION TO USE:	
<input type="checkbox"/> -#McNeil, #Charles	<input type="checkbox"/> -Gonzalez, Todd
<input checked="" type="checkbox"/> -Aben, Barbara	<input type="checkbox"/> -Goodbye, Gerald
<input type="checkbox"/> -Abernathy, Z.	<input checked="" type="checkbox"/> -Gooden, Samatha

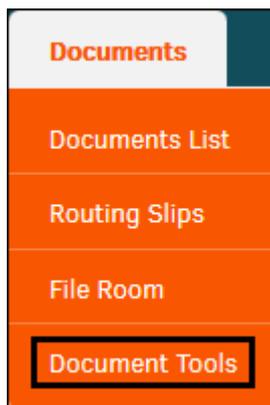
Docsave Permission

### 1.1.3 Docsave Drop-Down List Setup

Before you can use Docsave, the Categories and Matter Listing files must be downloaded to create the matter and document category drop-down lists that are available when uploading a document or email.

***Note:** These files must be updated whenever there is a change in your matter assignments or an adjustment was made to the document categories within Lawtrac. This ensures that the lists reflect updated information.*

1. Log into Lawtrac and select **Document Tools** from the **Documents** tab.



Document Tools Link

2. On the right side of the page, click **Lawtrac Docsave**.
3. Right click the **Matter Listing File** option and select **Save Link As**.



Docsave Drop-Down Files

4. Browse to the C:\Lawtrac directory. If this directory does not exist, a Lawtrac folder must be created to store this file.

5. Click **Save**.
6. Click **Close** when the **Download Complete** prompt appears.
7. On the Lawtrac application in **Document Tools**, right-click the **Categories File** option.
8. Repeat the same process as with Matter Listing File.

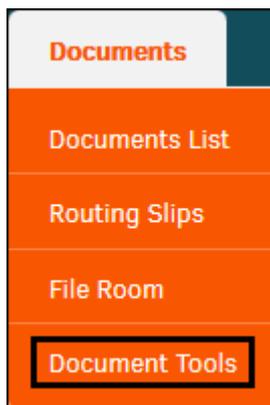
### 1.1.4 Installing Docsave

Prior to installing Docsave v2.0, ensure that all previous versions of Docsave are uninstalled. All instances of Lawtrac or Lawtrac Docsave that appear in Add or Remove Program must be removed. Reboot your computer once the program(s) has been uninstalled.

Ensure that the account you are using has the appropriate installation rights. Windows 7 users must respond to all security prompts during the installation to ensure that Docsave is installed successfully.

**Note:** For successful installation, you must have administrative rights on your computer. To check to see if you have these rights, go to **Start>Control Panel>User Accounts**. If your name does not include "Administrator", you cannot install Docsave properly. If your IT Department does not allow users to have administrative rights, the IT Staff can do the installation on that user's computer, or give them temporary rights until the install is complete.

The Docsave installation files are accessible from Lawtrac. Log into Lawtrac and select **Document Tools** from the **Documents** tab.



Document Tools Link

1. On the right side of the page, click **Lawtrac Docsave**.

DOCUMENT TOOLS C

**Lawtrac Connect**

Lawtrac Connect — Installation from a .zip file

The current installation package works for 32bit and 64bit computers.

For the installation to work correctly, you need to have the Microsoft Visual Basic and Microsoft Visual Studio 2010 Tools for Office Runtime application installed on your computer. You must uninstall any previous Lawtrac Connect installs. **During the Lawtrac Connect installation, your Outlook must be closed.**

1. Install this Microsoft Visual Basic PowerPacks 10.0 application:

1. Click the link: <http://go.microsoft.com/fwlink/?LinkID=145727&clcid=0x804>

2. Select "Run".

Lawtrac Connect

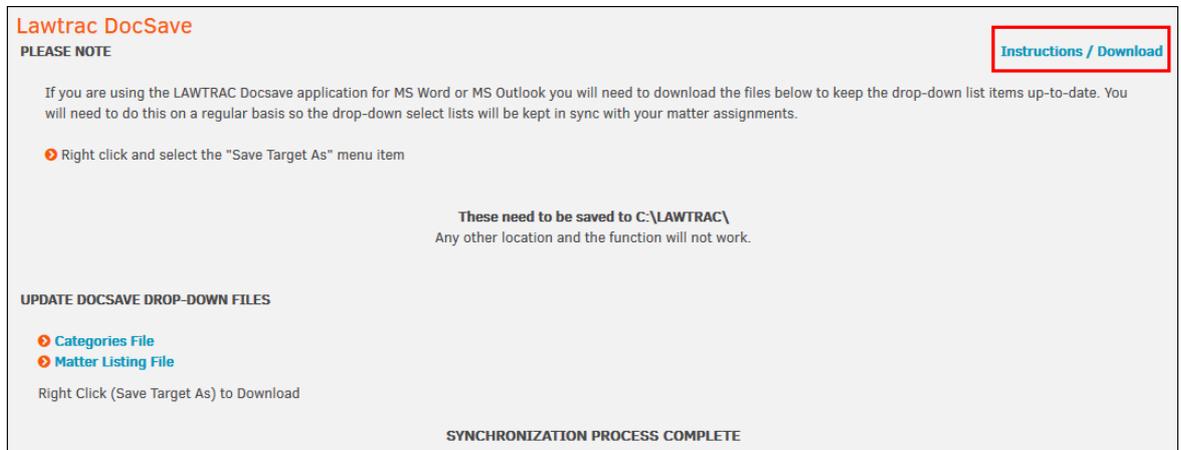
Lawtrac DocSave

Lawtrac Docsave

If you are using the Lawtrac Docsave application for MS Word or MS Outlook you need to download the files shown on this page to keep the drop-down list items up-to-date. You may

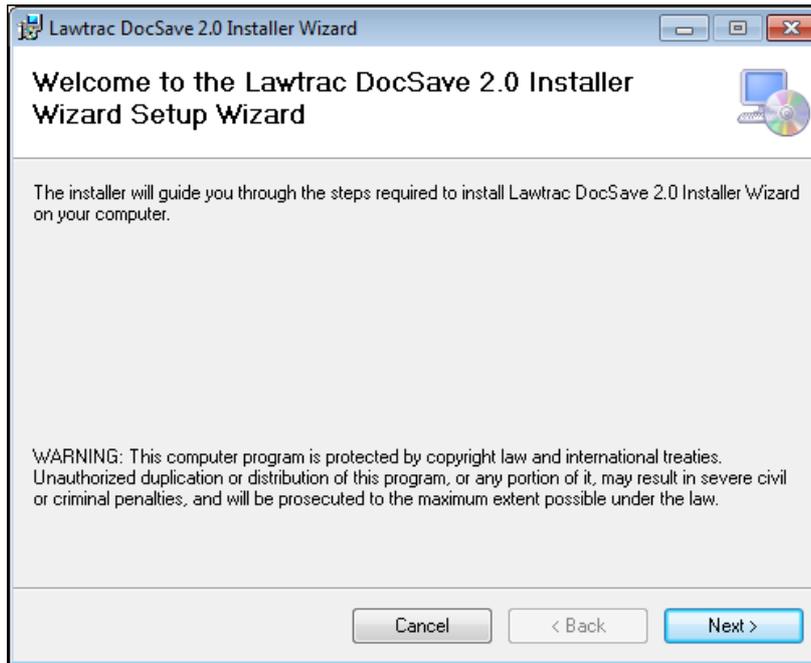
need to do this on a regular basis so the drop-down menus are kept in sync with your matter assignments.

2. Click **Instructions/Download**.



#### Download Docsave

3. Click **Docsave 2.0**.
  4. When the File Download screen appears, choose the **Save** radio button to save the Docsave2.zip file on your computer or **Open** to open the Docsave2.zip file. Click **OK**.
  5. If the Save option was utilized, navigate to the area where the Docsave2.zip file was saved and open it, or access the folder from your recent downloads in your file explorer. The Docsave2.zip contains two files—DocSaveInstallerWizard and setup.
  6. Double click **setup** to begin the installation.
- Note:** If Microsoft .NET Framework and/or Microsoft Visual Studio are not currently installed on your computer, a prompt to install these programs begins once the Docsave setup.exe file is executed.
7. If the .NET Framework installation prompt appears, click **Accept** to proceed with the installation.
  8. If the Visual Studio installation prompt appears, click **Accept** to proceed with the installation.
  9. The Running as Non-admin User prompt appears.
  10. Click **Yes**.
  11. Once .NET and/or Visual Studio is installed, the Docsave 2.0 Installer wizard begins; click **Next**.
  12. When the Select Installation Folder screen appears keep the default path indicated or click browse to specify another location. To view available disk space, select the **Disk Cost** button.
  13. Select the **Just me** radio button.
  14. Click **Next**.



Docsave Installation Wizard

15. Click **Next** once the Confirm Installation screen appears to begin the installation.
  16. Once the installation is completed, ensure that the **Launch Docsave 2.0** Installer option is checked in the following screen.
  17. Click **Close**.
  18. The Docsave Installer Wizard Welcome screen appears. Click **Next**.
- Note: if this screen does not appear, it may be minimized in your Taskbar.*
19. On the Outlook and Word detection screen, ensure that your current Outlook and Word version is selected. If it is not, make the necessary adjustment by selecting the appropriate radio button.
  20. Click **Finish**.
  21. Click **Close** when the following screen appears to proceed with installing Docsave.
  22. The Lawtrac Docsave 2.0 setup wizard will begin. Click **Next**.
- Note: The Office version indicated should match the version currently installed on your machine.*
23. When the **Select Installation Folder** screen appears keep the default path indicated or click browse to specify another location. To view available disk space, select the **Disk Cost** button.
  24. Click **Next**.
  25. Click **Next** to confirm the installation.
  26. Click **Close** once the **Installation Complete** screen appears.
- This completes the installation of Docsave v2.0.

## 1.2 Docsave

Docsave is used to drag and attach emails directly to a matter from Outlook or send documents to the Lawtrac application directly from Microsoft Word.

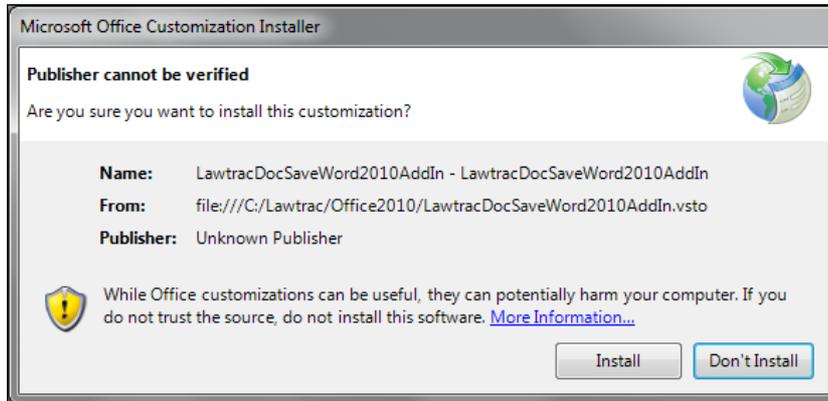
1. LT hosted customers need to request that support set up a FTP site and provide FTP log-in information. Customers hosting their own site must set up a FTP site; Lawtrac can provide guidance.
2. Refer to the steps below to turn on the Docsave feature:
  - a. Select **Application Administration** from the **My Lawtrac** tab
  - b. Select **Document Bank**
  - c. Select **Document Bank Switches** in the sidebar
  - d. Click the **On** button for the Lawtrac Connect/Docsave plug-In feature
3. Refer to the steps below to ensure that the desired users have rights to access this feature:
  - a. Select **Application Administration**
  - b. Select **Document Bank**
  - c. Select **Docsave Configurations**
  - d. In the **Individuals with Permission to Use** section, select the checkbox to the left of the desired individual(s) name
  - e. Click **Change User Information** at the bottom of the list
4. Each user must know their Team ID and Docsave password before installing Docsave:
  - a. Expand the **People** tab
  - b. Select **In-House Legal Department**
  - c. Find user name and open profile
  - d. Note the user's Lawtrac Team ID on the opening page under **Status**

**Note:** Your site administrator is to provide the Docsave password.

5. Each user must install Docsave (refer to [Docsave User Guide](#))

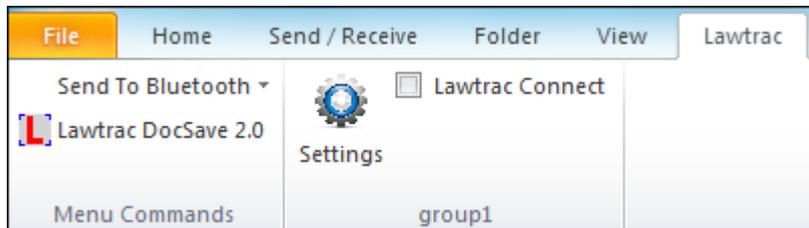
## 1.2.1 Using Docsave in Outlook

1. Open Outlook. If the Microsoft Office Customization Installer appears, click **Install**.



Docsave Installer

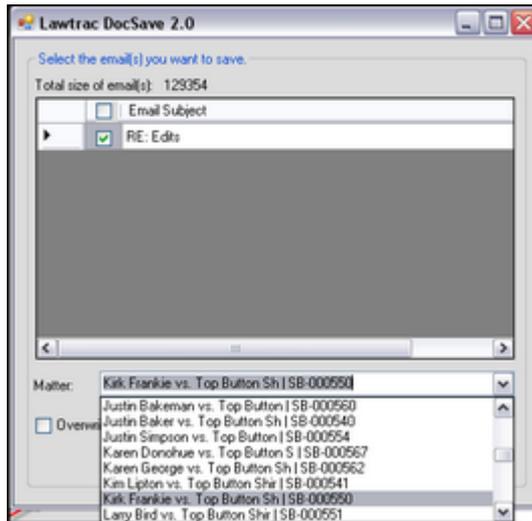
2. Upon accessing Outlook (after installation), the Lawtrac Docsave 2.0 option is available in the top menu bar under **Lawtrac**. Click the tab to open the Docsave window.



Docsave in Outlook

3. To begin an upload, highlight the desired email(s). Place a check in the box to the left of the email(s) you want to upload. You can also check the Email Subject box to upload more than one email.

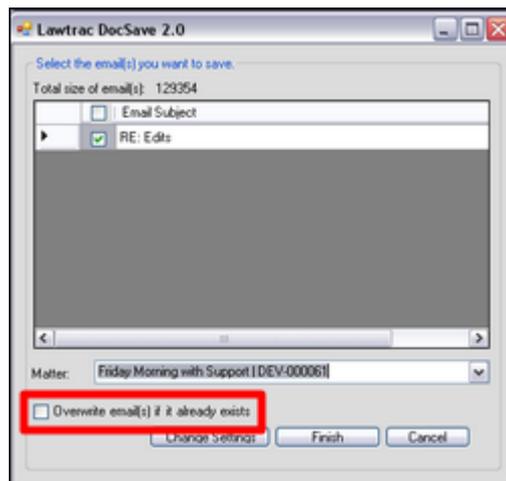
**Note:** Do not include file names that have a number symbol or octothorpe (#), dollar sign (\$), ampersand (&) or include the words "SUBMIT", "UPDATE", or "SCRIPT". Do not include multiple emails with the same subject. If the email subjects include any of these symbols/words or contain the same subject, open the email in Outlook to update the subject. Click **Yes** when prompted to save the changes when closing the email message to ensure the new email subject is saved.



Select a Matter

**Note:** All emails are uploaded as Correspondence.

4. To overwrite an existing email (with the same subject) for that matter, check the Overwrite email(s) if it already exists. Click **Change Settings**.



Change Settings

5. Input the name of your FTP Server, FTP Log-in, FTP Password and Team ID.

**FTP Settings**

**Note:** This information is stored in [Lawtrac](#). For Office 2007/2010, your FTP Password is available through your site administrator.

If you want to save your settings, click the **Save Above as User Settings** option. If this option is selected, your settings are retained for future uploads. You can select the **Reset Settings** option if you want to reset the settings previously saved.

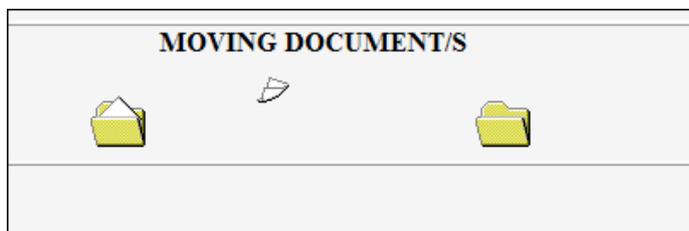
6. Click **Next**.
7. Click **Finish**. Once the email has been successfully transferred to the FTP site, the following prompt appears. **Note:** This prompt may take a few seconds to appear. Do not click **Finish** again.



**Successful Transfer**

The file does not appear within the matter in Lawtrac unless the Docsave switch (in **Application Administration>Document Bank>Document Bank Switches**) is turned on or until the files are automatically moved by the application. This occurs twice an hour (15 minutes past the hour and 15 minutes to the hour) while users are actively working in the application.

When moving the files manually, the following graphic appears while the documents are being moved to the appropriate matter. This moves all pending files, including files uploaded by other users.



**Document Transfer in Process**

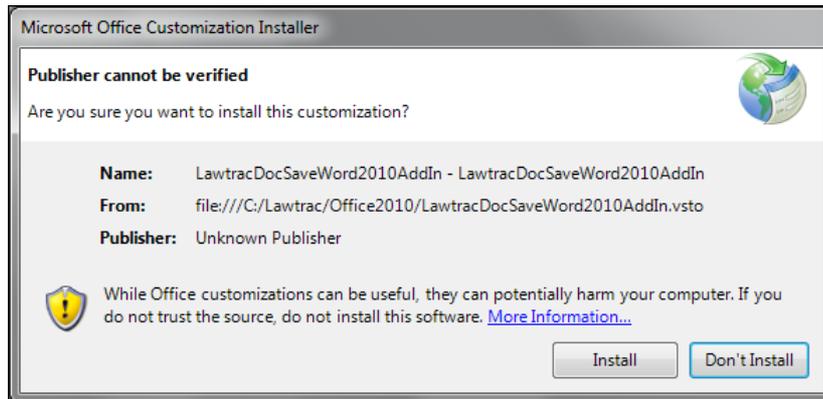
Once all files have been moved, the "Process Complete" text appears. **Note:** Do not navigate from this screen until the "Process Complete" message appears.



Completion Notification

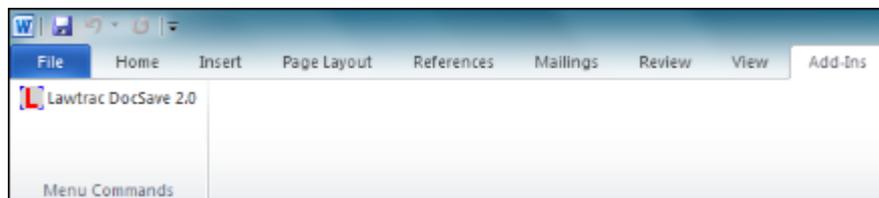
## 1.2.2 Using Docsave in Word

1. Open Microsoft Word. When the Microsoft Office Customization Installer appears, click Install.



Docsave Installer

2. The Docsave icon appears on the **Add-Ins** tab (or under the **File Menu** in Word 2003). To upload a document into Lawtrac, click the Docsave icon.



Docsave in Word 2010

3. When the following prompt appears, click **Yes**.



Docsave Confirmation

4. The File Name, Directory To Save (matter), and Category Name fields are required.
  - a. Input a file name. Do not include file names that have a number symbol or octothorpe (#), dollar sign (\$), ampersand (&) or include the words ', 'SUBMIT', 'UPDATE', or 'SCRIPT'.

- b. Select a matter from the Directory to Save drop-down list.

**Docsave Directory**

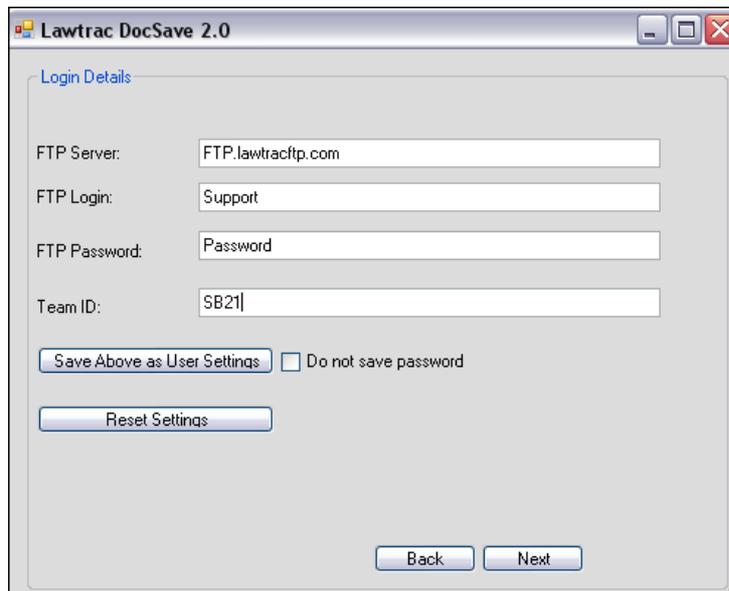
- c. Select a Category. If your company is not currently using document categories, you may need to add a document category "N/A" to Lawtrac. Go to **Application Administration>Document Bank>Document Categories** and proceed with adding this category. Once this entry is completed, the Categories file must be updated to reflect the new entry. Refer to the Docsave [Drop-down List Setup](#) section.
- d. Input the author name or typist if desired. For some users, the PC name appears in the Author field by default.
- e. Select the appropriate radio buttons for the **Outside Counsel Access Rules** and **Version Control** per the chart below.

Outside Counsel Access Rule Option	Results
All Vendors Have Access	All law firms and/or vendors assigned to the matter have the ability to view this document.
Only Assigned to Matter	Only law firms and/or vendors assigned to the matter have the ability to view this document.
Restrict to All	All law firms and/or vendors do <b>not</b> have the ability to view this document.

Version Control	Results
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Skip If Exists	If a document with the same name exists for the matter selected, the document is not to be uploaded to that matter.
Save As New	If a document with the same name exists for the matter selected, the document is to be added with a number appended to the document name (i.e. New document name1.docx).
Overwrite Old	If a document with the same name exists for the matter selected, the document is to be overwritten. However, if there is not a document with the same name in the matter, it will not be added to the matter even though you may receive a successful transfer confirmation.

- f. Click **Next**.
- g. Input the name of your [FTP Server](#), FTP Log-in, FTP Password and Team ID.
- h. To retain your settings for future uploads, click the **Save Above as User Settings** option. Select the **Reset Settings** option if you want to reset the settings previously saved. Click **Next**.



Lawtrac DocSave 2.0

Login Details

FTP Server:

FTP Login:

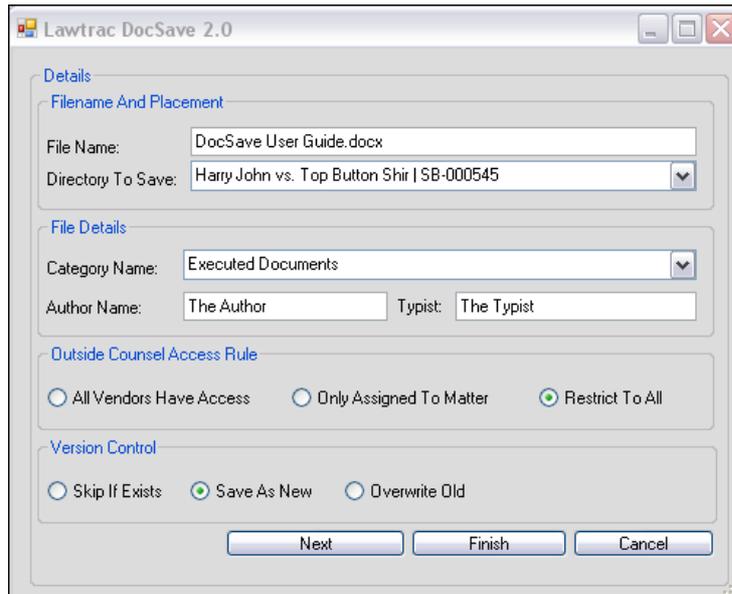
FTP Password:

Team ID:

Save Above as User Settings  Do not save password

Click Next

- i. Click **Finish**.



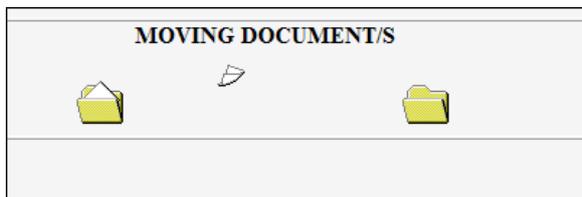
**Click Finish**

- Once the document has been successfully transferred to the FTP site, the following prompt appears. **Note:** *This prompt may take a few seconds to appear. Do not click **Finish** again.*



**Successful Transfer**

- The file does not appear within the matter in Lawtrac until the Docsave icon (on the home screen) is selected or until the files are automatically moved by the application. This occurs twice an hour (15 minutes past the hour and 15 minutes to the hour) while users are actively working in the application.
- When selecting the Docsave icon to move the files manually, the following graphic appears while the documents are being moved to the appropriate matter. This moves all pending files, including files uploaded by other users.



**Document Transfer in Process**

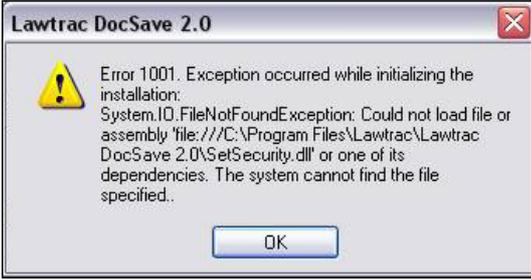
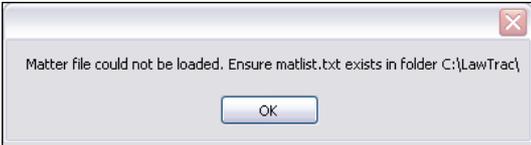
- Once all files have been moved, the "Process Complete" text appears. **Note:** *Do not navigate from this screen until the "Process Complete" message appears.*

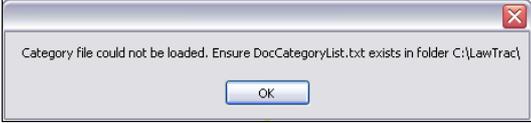


Completion Notification

## 1.3 Common Issues & Solutions

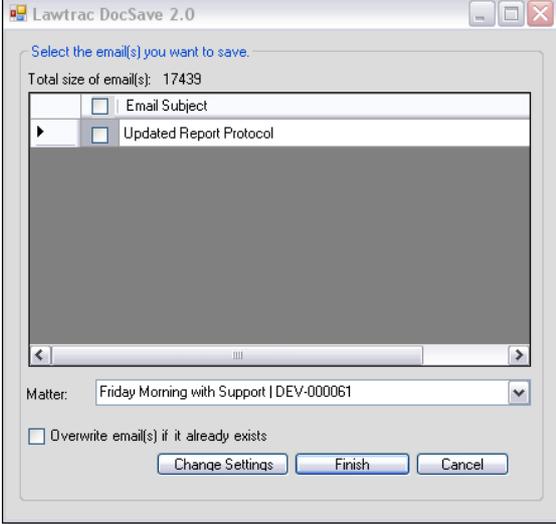
### Common Issues & Solutions

Issue	Solution
<p>Another version of Lawtrac Docsave is already installed.</p> 	<p>If the following error appears when attempting to install Docsave 2.0. Go to your computer's <b>Control Panel&gt;Programs</b> and uninstall Lawtrac Docsave 2.0.</p>
<p>Error 1001: File Not Found.</p> 	<p>Proceed with reinstalling Lawtrac Docsave 2.0. The option to <b>Repair</b> or <b>Uninstall</b> Docsave appears; select the option <b>Repair</b>. Upon completion, go to your computer's <b>Control Panel&gt;Programs</b> and uninstall Lawtrac Docsave 2.0. Once the uninstall is complete, reboot your computer and proceed with the re-installation.</p>
<p>The installation is completed, but the Docsave option does not appear in Outlook or Word.</p>	<p>Go to <b>Start&gt;All Programs&gt;Lawtrac&gt;Lawtrac Docsave 2.0 Installer Wizard&gt;Docsave 2.0 Installer Wizard</b>.</p>
<p>Matter file could not be loaded.</p> 	<p>Ensure that the MatList.txt file exists in C:\Lawtrac. Refer to the <a href="#">Docsave Drop-down List Setup</a> section for instructions on downloading this file.</p>
<p>Category file could not be loaded in Word:</p>	<p>Ensure that the DocCategoryList.txt file exists in the C:\Lawtrac directory. If it does not, refer to</p>

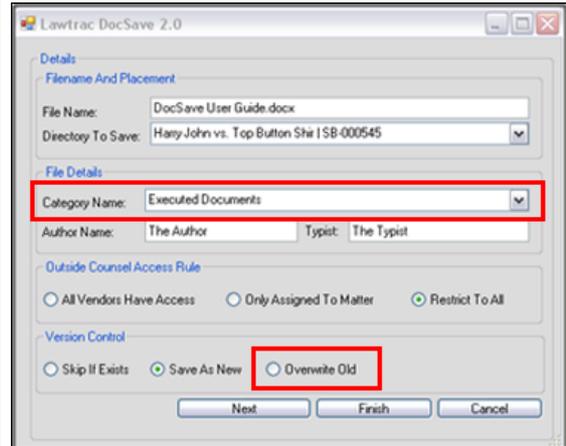
	<p>the <a href="#">Docsave Drop-down List Setup</a> section for instructions on downloading this file.</p>
<p>Selected document could not be transferred.</p> 	<p>Click <b>OK</b> and select the <b>Show Log</b> option to get more details. Contact Lawtrac Support at <a href="mailto:Support@lawtrac.com">Support@lawtrac.com</a> with the error indicated in the log.</p>
<p>The following error appears when selecting <b>Show Log</b>:</p> 	<p>Review your FTP settings to ensure that all of the information was entered correctly. Contact Lawtrac Support at <a href="mailto:Support@lawtrac.com">Support@lawtrac.com</a> with the error indicated in the log.</p>

## 1.4 Known Issues

### Known Issues

Issue	Screen-shot
<p>No file is transferred if none of the checkboxes are selected when uploading an email. The prompt appears indicating that it was successful, but no action was taken. Ensure at least one of the checkboxes are selected before clicking <b>Finish</b>.</p>	

If **Overwrite Old** is selected, the document within the matter will be overwritten. However, if the category name is changed, the category will not be overwritten. Within the matter, go into **Document & Files** and edit the category name.



Lawtrac DocSave 2.0

Details

Filename And Placement

File Name: DocSave User Guide.docx

Directory To Save: Harry John vs. Top Button She ISB-000545

File Details

Category Name: Executed Documents

Author Name: The Author    Typist: The Typist

Outside Counsel Access Rule

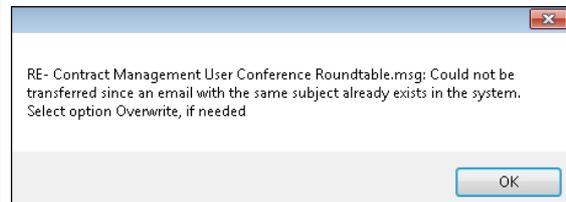
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