MITRATECH

Lawtrac® 4.0

Key Personnel User Guide

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Document ID: lt_40_KPUserGuide, published on 10/30/2017

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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 Self-Service User Guide for Key Personnel

1.1 Introduction

The **Self-Service** module can be set up so that key personnel can submit requests directly to the Legal department. Legal then reviews the request and either accepts or rejects it. Once the matter is accepted, you are able to access the matter and any documents that you upload and documents that Legal has given you permission to access.

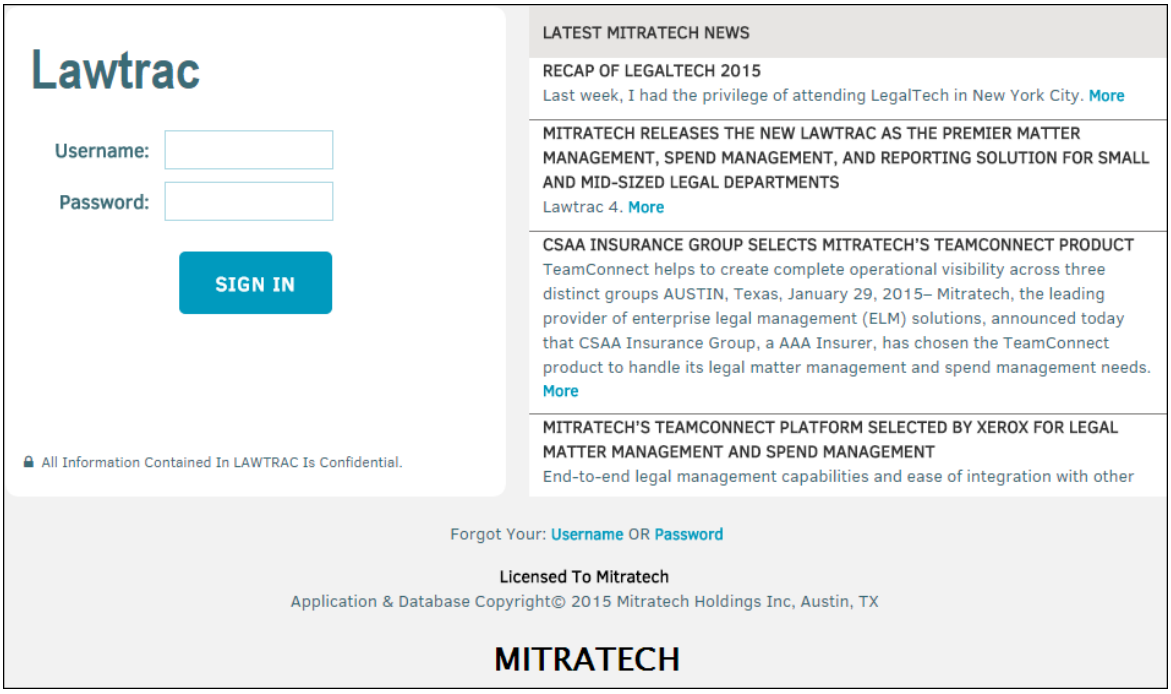
The read-only set-up does not allow key personnel to submit requests directly to the in-house legal team. However, if you are assigned to the matter you have access to the record and be able to view certain information pertaining to that matter. The documents may or may not be accessible, depending on the permissions set by legal.

Note: *Captions of date and text fields are specific to each customer. The captions and screen-shots used in this guide are generic and may not match what you see on your screen.*

1.2 Log On

Your company's Lawtrac site administrator provides you with log-in information and the URL address to access the site.

Complete the user name and password fields and then press **Enter** on your keyboard or click **Sign In** to log in.



Lawtrac Login Page

1.3 Quick Find

Quick Find is one of several ways to locate matter records, invoices, or budgets. Often, it's the fastest way to search and you find the **Quick Find** at the top of all screens in Lawtrac.

Search for matters using the **Quick Find** feature at the top right of the screen. Type in part of a matter name, matter number or prefix (minimum three (3) characters). Click **Find**.

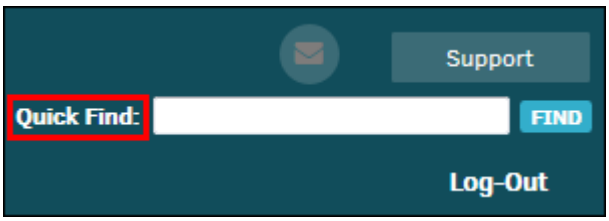
Examples: ABC (part of matter/request name)

CON%3 (for CON-00003)

CON- (prefix number)

The default is All Matters and All Requests, but you can continue refining your results:

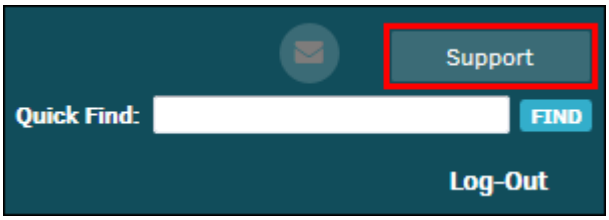
- Matter: Find open, closed or all
- Requests: Find pending, rejected, accepted, or all
- Use the date fields to limit further



Lawtrac Quick Find

1.4 Support

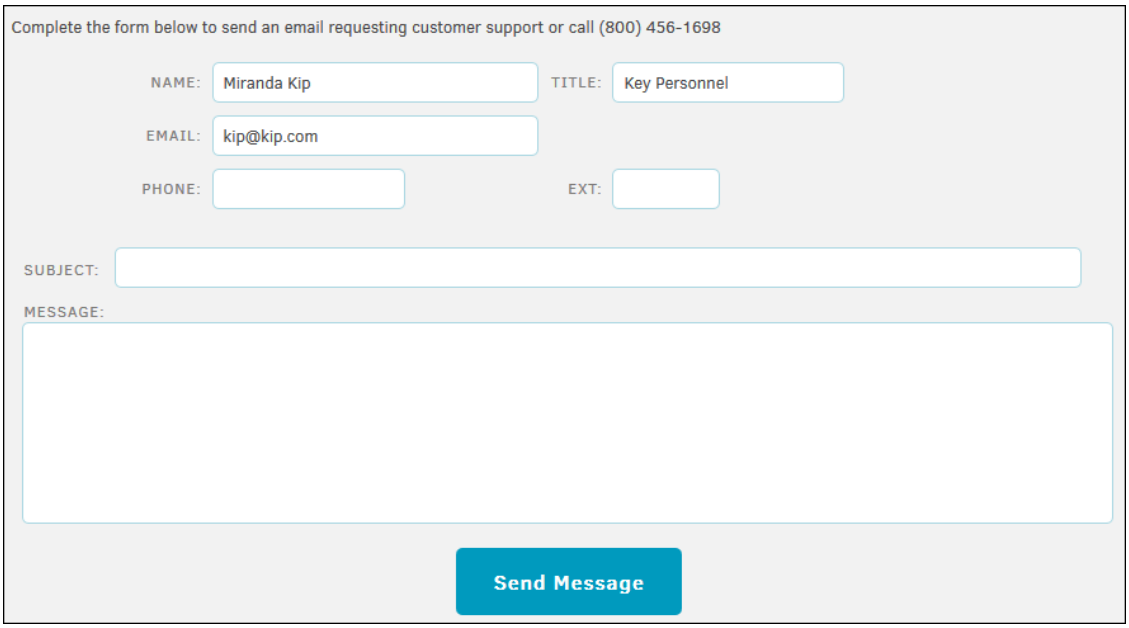
An email requesting support can be sent directly to the LTO Support Team.



Lawtrac Support

Your name, title, and email should pre-populate the appropriate text fields. Phone number and subject are optional, but may help the LTO Support Team address your problems.

Create a descriptive outline of your support needs in the Message text box, then click **Send Message**.



1.5 Top Navigation Bar

At the top of the page in your Lawtrac application you can find several tabs designed to help you navigate through your matter records.

Hover your mouse pointer over the heading to view a drop-down list of hyperlinks.

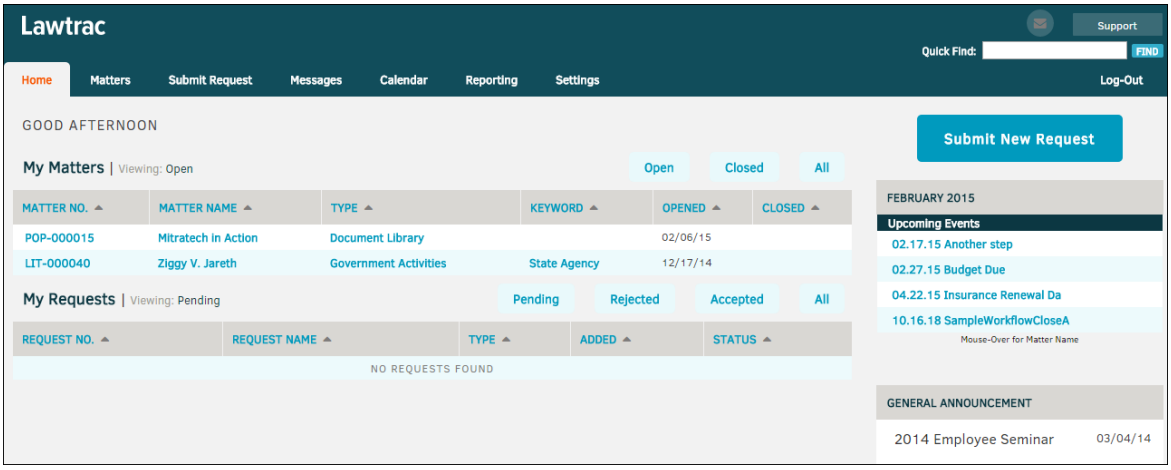
Top Navigation Bar

Top Navigation Options:

Tab	Function
Home	This is the page you first see when logging into Lawtrac.
Matter	Displays all open matters to which you are assigned.
Submit Request	Submit a request to your Legal Department.
Messages	View all Lawtrac internal messages and notices.
Calendar	View a month-to-month calendar for events.
Reporting	View reports containing information on matter records to which you are assigned.
Settings	Update your contact information, change your user name, etc.

1.5.1 Home Page

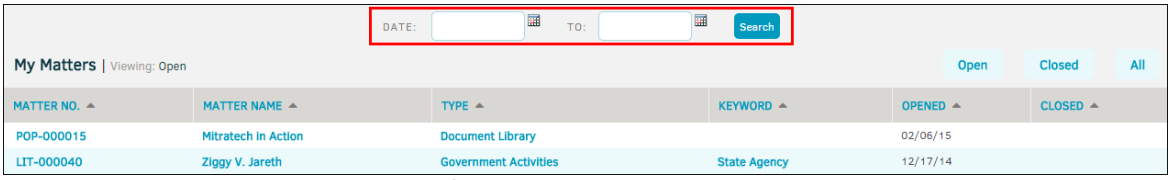
The home page displays all open and closed matter records to which you are assigned. Requests that have been accepted, rejected, or are pending are also listed. You can click on the headings in bold to sort your list.



Lawtrac Home Page: Key Personnel

In the My Matter and My Requests tables, click on the matter or request number to be directed to that matter record or request information page.

Click on Type (i.e. Document Library or Government Actions) to open a search tool at the top of the page. This search tool looks for matter records within a specific period of time. Use the icon to select a date from the calendar.



Search Tool: Time Period

Located on the right side of the page are your upcoming events, which include notifications from your assigned matter records, if you have been allowed notification permissions. Click on the event title to navigate to that matter record or event information.

Announcements and notifications are located here as well, as set up by the site administrator. These notices could be anything from general announcements to instructions and reminders.

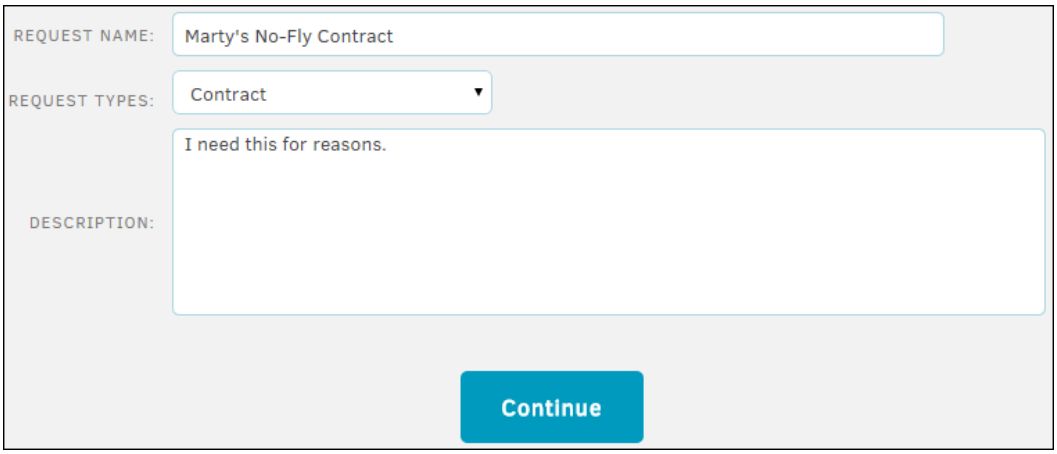
Click **Submit New Request** to create a request for such things as contracts, approval for an issue, claim numbers, etc. Any requests made here show up on your home page, where you can review them, and also show up in your key personnel user profile for the in-house legal team and Site Administrators to view.

1.5.1.1 Submit New Request

Click the **Submit New Request** button on the home page to make a request to your in-house legal team or site administrator. These requests can be seen from your user profile on the Lawtrac application.

Assign the request a unique name or identifier, and choose the type of request from the drop-down menu. Add a summary of the request in the Description text field, if desired.

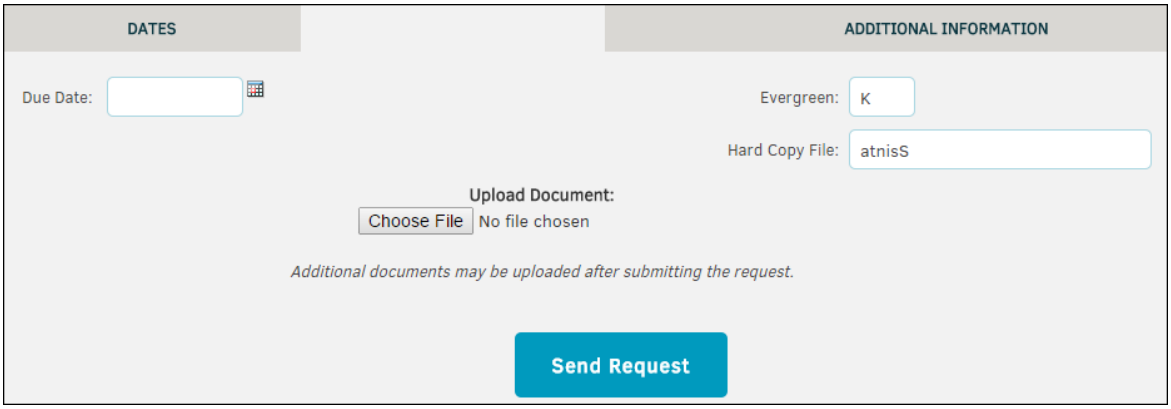
Click **Continue**.



New Request

You can now add a due date for your request, or attach a document. Different request types may have different date types that correspond with your selection. (For example, an HR Issue request may have date options for employment start date and date of alleged incident).

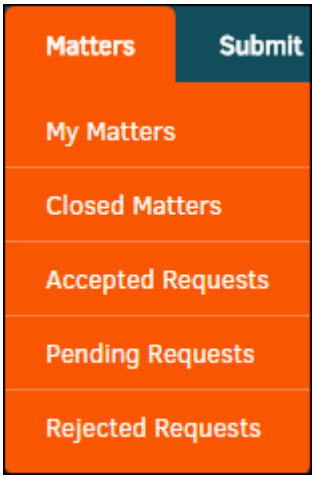
Click **Send Request** to finalize the process.



Send Request

1.5.2 Matters

Hover your mouse pointer over the **Matters** tab to locate your matter and requests.



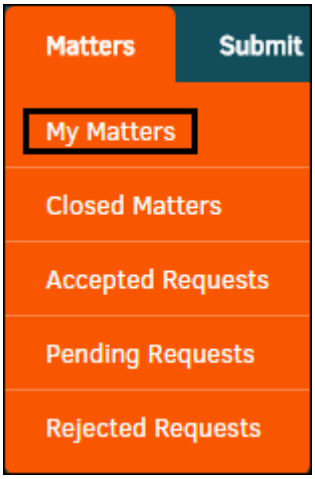
Matters Tab

Matter Options:

Page	Function
My Matter	View a list of matter records to which you are assigned.
Closed Matter	View all closed matter records to which you are assigned.
Accepted Requests	View all requests you have made that have been accepted.
Pending Requests	View all requests you have made that are pending acceptance.
Rejected Requests	View all requests you have made that have been rejected.

1.5.2.1 My Matters

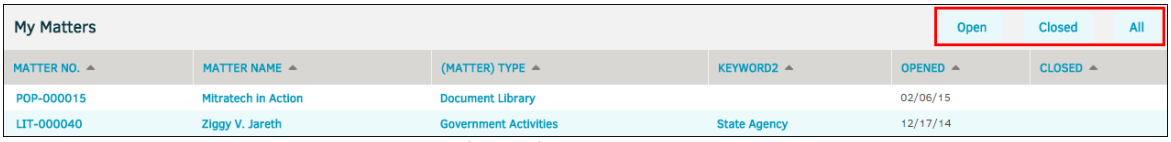
The **My Matter** hyperlink in the **Matters** tab takes you to a list of matter records to which you are assigned, as well as your requests.



Matters: My Matters

Click on the matter number or name to view the matter record information.

Use the buttons at the top right corner of the list to filter your matter to only show those which are opened, closed, or both.



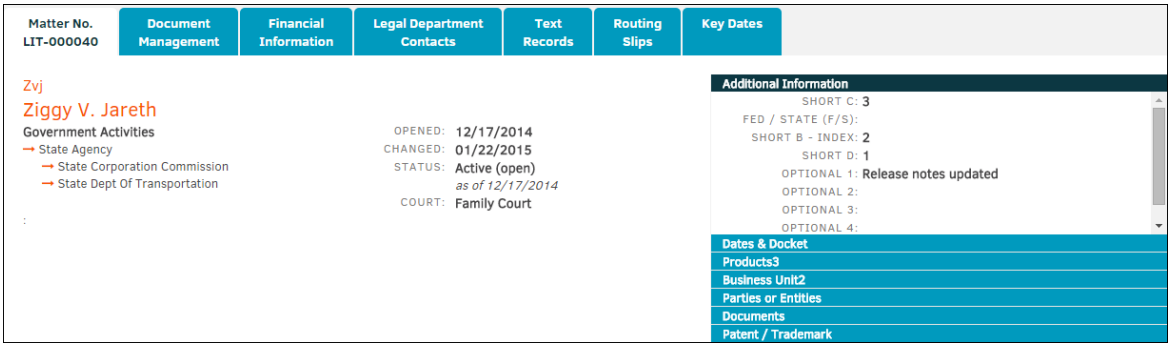
View Open, Closed, or All Matters

The search tool located above your matter can narrow your list to show only matter records created during a specific time period. Click on the icons to select a date, then click **Search**. This tool can also filter your request list.

Search for Matters

1.5.2.1.1 Matter Screen

From **My Matter** under the **Matters** tab, click on the matter number or name to view the matter record information.



Matter Default Screen

The main page shown when opening a matter record contains all the basic information about the record, including date opened/closed, status, and Type.

Any correspondence that your site administrator wishes you to see appears here as well.

The right side of the page contains additional information in collapsed boxes. Click on each blue bar to expand the information.

Important Note: *Site Administrators access site-wide customization options via* ***My Lawtrac>Application Administration>Matter Maintenance>Legal Hierarchy Maintenance.***

Because of ***Lawtrac's*** *customization features, your matter screens may look different than the examples shown in this guide. Depending on the Type classification, sections such as Contract/ Contact Information may not be displayed. Many of the captions and labels in Lawtrac are dependent on the Type classification. These captions are also set by your site administrator.*

1.5.2.1.1.1 Document Management

Lawtrac allows key documents to be uploaded to matters so they can be shared with other corporate staff and outside counsel (if desired).

Select the **Document Management** tab at the top of the matter record screen.

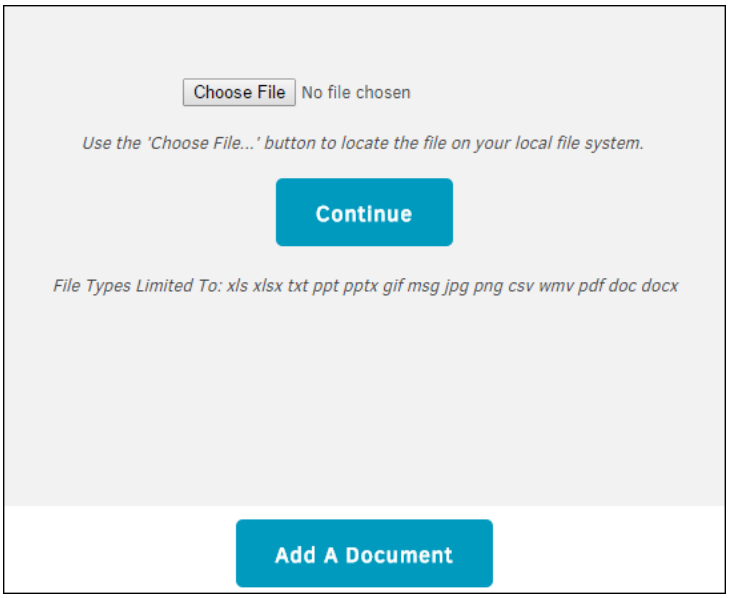
Document Management Tab

It is recommended that matter-related documents be added from within the matter itself; this way the document is automatically associated to the correct matter.

Select the **Document Management** tab within a matter assignment. On the right, click **Add a Document** to open a search window. Click *Browse...* to locate the file on your local file system. Click **Open** and click **Continue** to confirm.

A "File was Saved" notice appears after a successful upload.

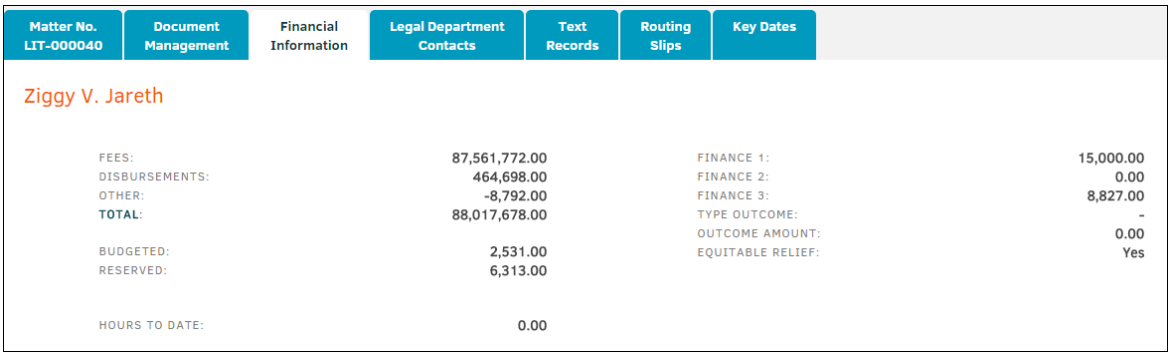
Important Note: *File types are limited to* .xls, .xlsx, .txt, .ppt, .pptx, .gif, .msg, .jpg, .png, .csv, .wmv, .pdf, .doc, *and* .docx.



Add a Document

1.5.2.1.1.2 Financial Information

The **Finance Information** tab allows users to view financial records of the selected matter. ***Important Note:*** *If the matter record is not associated to a firm/vendor with an invoice, certain subjects may not be present.*



Financial Information

- Fees, Disbursements, Other

  These amounts are taken from invoices associated with the matter.

- Total

  This is the sum of all invoice totals, including approved, pending, and rejected.

- Disbursements

  The amount shown is the sum of all disbursements for all invoices—even if there are multiple different invoices.

- Budgeted

  The amount shown is the sum of all budgets assigned to the matter record, even if they are from different vendors.

- Reserved

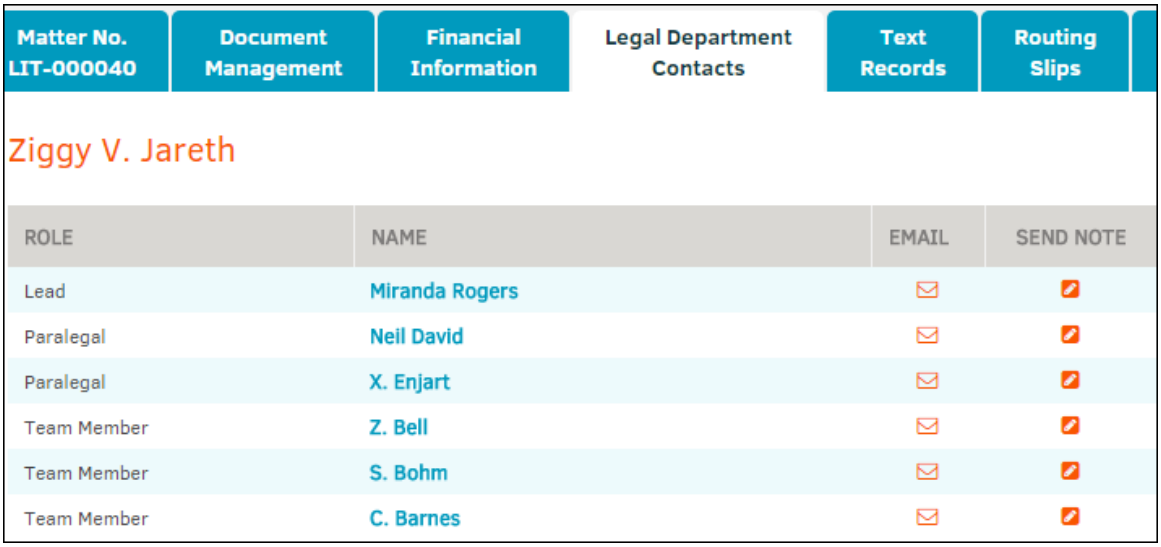
  The amount shown is the sum of all reserves despite differing categories, but payments to parties and outstanding loss reserve can only be viewed as an in-house legal member.

- Finance 1, 2, 3, and Outcome Amount

  These amounts reflect the insurance amounts paid by the company.

1.5.2.1.1.3 Legal Department Contacts

The **Legal Department Contacts** tab shows all members of the in-house legal team who are associated with the matter, and displays their roles.



Legal Department Contacts

Within every matter record there are four available areas of responsibility. Click the following titles to review information about the position:

- **Lead Role**
- **Paralegal Role**
- **Administrative Role**
- **Team Member Role(s)**

Send the legal team member an email or an internal note that they can access inside Lawtrac by clicking the corresponding icon to the right of their names.

Click on an individual's name to pull up their address and additional contact information on the right side of the screen. ***Note:*** *If the individual has not entered this information into their profile, you only see their name and email address, as those fields are required.*

ROLE	NAME	EMAIL	SEND NOTE
Lead	Miranda Rogers		
Paralegal	Neil David		
Paralegal	X. Enjart		
Team Member	Z. Bell		
Team Member	S. Bohm		
Team Member	C. Barnes		

CONTACT INFORMATION

C. BARNES
Contract/Consultant

Corporate Headquarters

1122 Stable Blvd.
Lower Floors
Hamburger Hills Valley, MO 123456

111-555-1212

MartinC@LTODev.com

Legal Department Contact Information

One of two required positions, the Lead position within the matter record is reserved for the individual who is responsible for managing the matter and reporting the status of the matter to your corporate/ company hierarchy. This person must have invoice approval authority for at least one dollar (US $).

The person in this position is automatically notified when the matter is updated, either by individuals within the legal department or outside counsel, and when financial considerations are updated (invoices or budgets received).

This position is based on the premise that the authority to conduct business within the matter can be delegated to others, but never the responsibility for the matter.

The second position is typically reserved for the “primary contact”. This person may be responsible for the day-to-day activities of the matter at the corporate or company level and could be, for example, a paralegal.

Outside law firms, vendors, and other corporate key personnel can be directed to contact the individual in the secondary position in order to keep all information within the matter up-to-date.

This position may work in concert with the secondary position, or may be assigned duties specific to matter types in order to enhance the management of matter information.

Because individual permissions can be set at the activity level, an individual assigned to this position on the legal team may not be privy to financial or other information within a matter, but may help shoulder the responsibility to ensure the matter data is current and accurate.

This position, along with the Lead, is also a required position. Whoever adds a new matter record into Lawtrac is automatically assigned to that matter’s team.

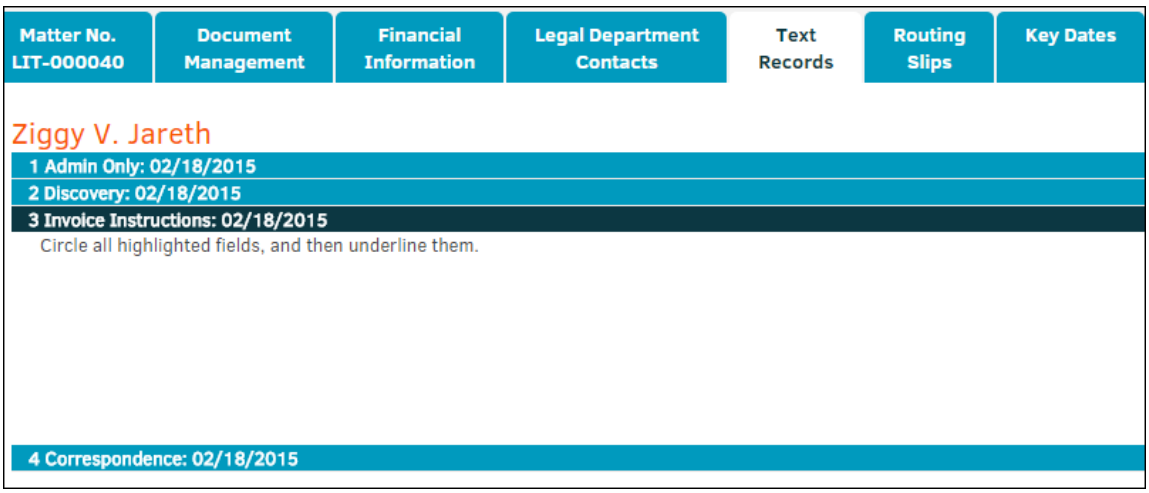
Because a matter’s security settings can restrict viewing to only those assigned to it, there must always be at least one person assigned to the team. This prevents matter records from "falling through the cracks" and being lost within the Lawtrac application.

Depending on the view/edit permissions granted to the individual Team Members, they have full authority to interact with the matter information, as do all of those in the higher positions.

1.5.2.1.1.4 Text Records

The **Text Records** tab allows you to view texts such as invoice instructions or outcome notes that have been added to the matter.

Text records can be added to a matter record by site administrators and the legal team involved with the matter. When a text record is created, security options can be set to allow outside counsel and key personnel to view the category, or not. Unless you have been given Read Access to the record, it does appear in this tab.



Text Records

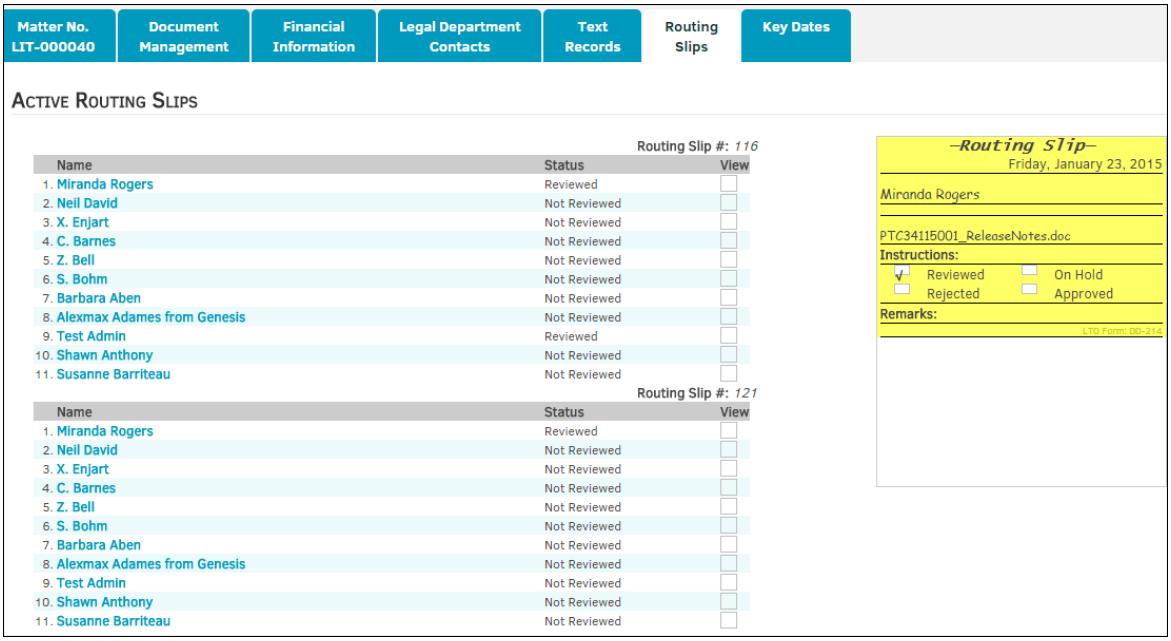
Text records are listed chronologically in expandable bars. Click on the text record category to open the message, and then click the category again to close it. All texts can be expanded to view all messages at once.

1.5.2.1.1.5 Routing Slips

Routing slips are a way of bringing either matters or documents to the attention of an individual from whom an action or response is needed. At this time, routing slips are for the use of legal staff only, however, key personnel can see the routing slips on those matters to which they are assigned and have been given access.

When an individual assigned to a routing slip is not already on the matter's Legal team, that individual is included in a routing slip role. This enables them to view the matter and its documents, regardless of work group settings, and to respond to routing slips for that matter. Once the routing slips have been removed, individuals in a routing slip role are no longer assigned to the matter.

The **Routing Slip** tab in a matter screen allows Lawtrac users to view the routing slips, the individuals reviewing the slip, and the status of their reviews.



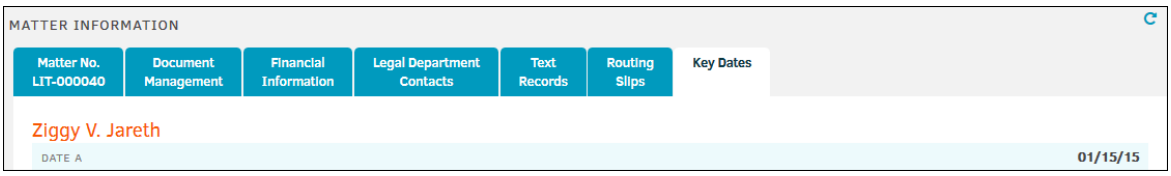
Routing Slips

Click on the icon in the **View** column or the individual's name to view the routing slip. The photo above shows a routing slip for review of a document, which you can find in Document Management. The routing slip is always either for a document or the review of the matter record itself.

1.5.2.1.1.6 Key Dates

Key dates added to a matter record by the Legal team or a site administrator appear in the **Key Dates** tab within a matter. While there are several key date and reminder options for a matter record, you only see events here that the legal team has chosen to share.

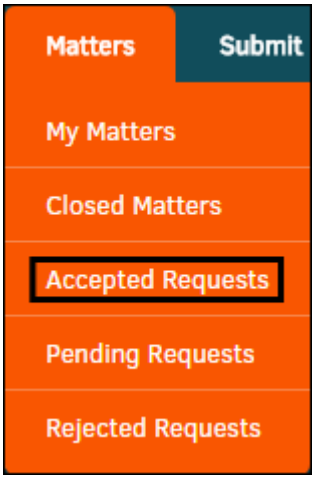
If your legal team or site administrator has given you edit permissions for the event, the icon is displayed to the right of the event date. Click this icon to adjust the date, and click **Save**.



Key Dates

1.5.2.2 Requests

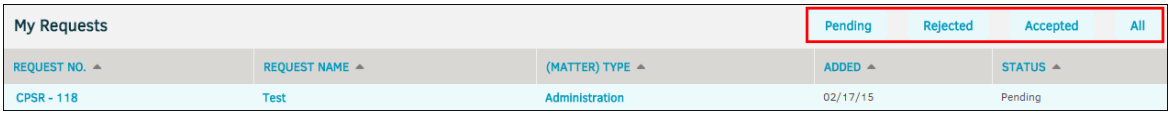
The **Requests** hyperlinks in the **Matters** tab takes you to a list of matter records to which you are assigned, as well as your requests.



Matters: Requests

Click on the request number or name to view the information.

Use the buttons at the top right corner of the list to filter your request to only show those which are opened, closed, or both.



My Requests

The search tool located above your requests narrows your list to show only those created during a specific time period. Click on the icons to select a date, then click **Search**. This tool also filters your matter list.

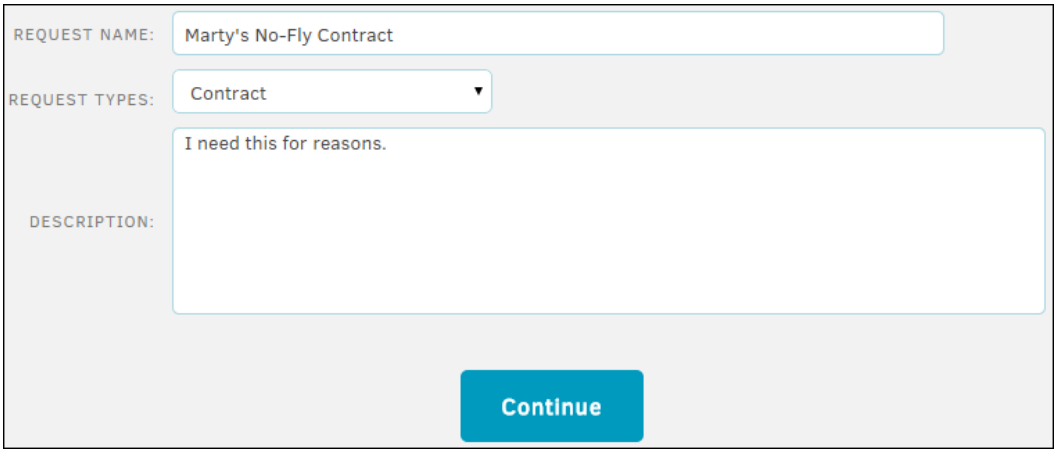
Search for Matters

1.5.3 Submit Request

Click the **Submit Request** tab on the home page to make a request to your in-house legal team or site administrator. These requests can be seen from your user profile on the Lawtrac application.

Assign the request a unique name or identifier, and choose the type of request from the drop-down menu. Add a summary of the request in the Description text field, if desired.

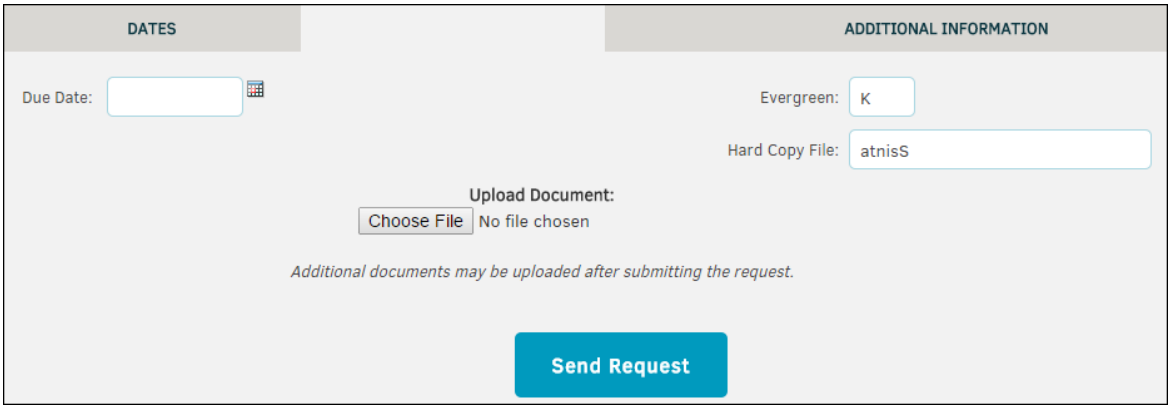
Click **Continue**.



New Request

You can now add a due date for your request, or attach a document. Different request types may have different date types that correspond with your selection. (For example, an HR Issue request may have date options for employment start date and date of alleged incident).

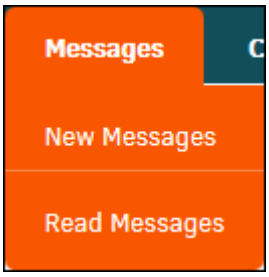
Click **Send Request** to finalize the process.



Send Request

1.5.4 Messages

The **Messages** link across the top navigation bar allows users to read Lawtrac internal messages such as notices indicating changes have been made by the legal team, or messages sent by other users.

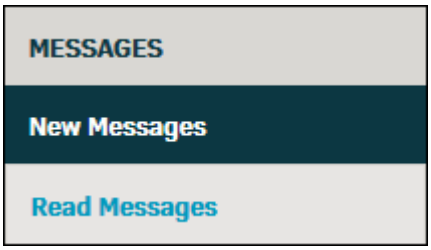


Messages Tab

You are notified of new messages by the mail icon that appears at the top of the page next to the **Support** link. The icon is highlighted in orange when there is a new unread message in your inbox.

New Message Alert

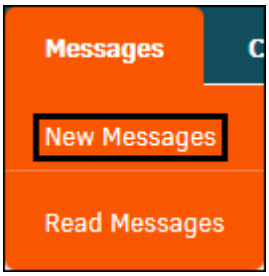
By clicking either **New Messages** or **Read Messages**, you have the ability to navigate between new and read messages from within the page by using the sidebar on the right.



Messages Sidebar

1.5.4.1 New Messages

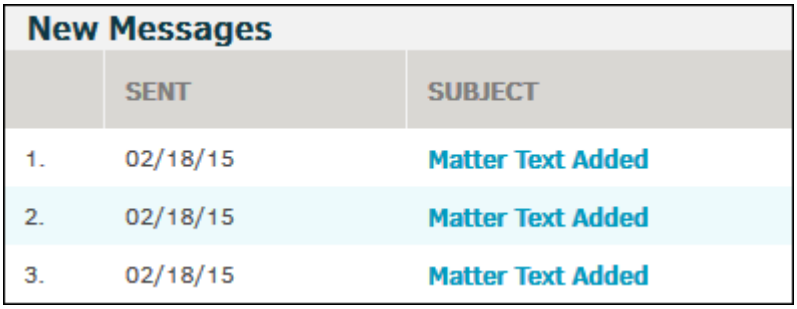
From the **Messages** tab, select **New Messages** to view unread messages.



New Messages Link

If you do not have any unread messages, this page emerges blank. Your unread messages appear in chronological order.

Click the subject of the message to view details.



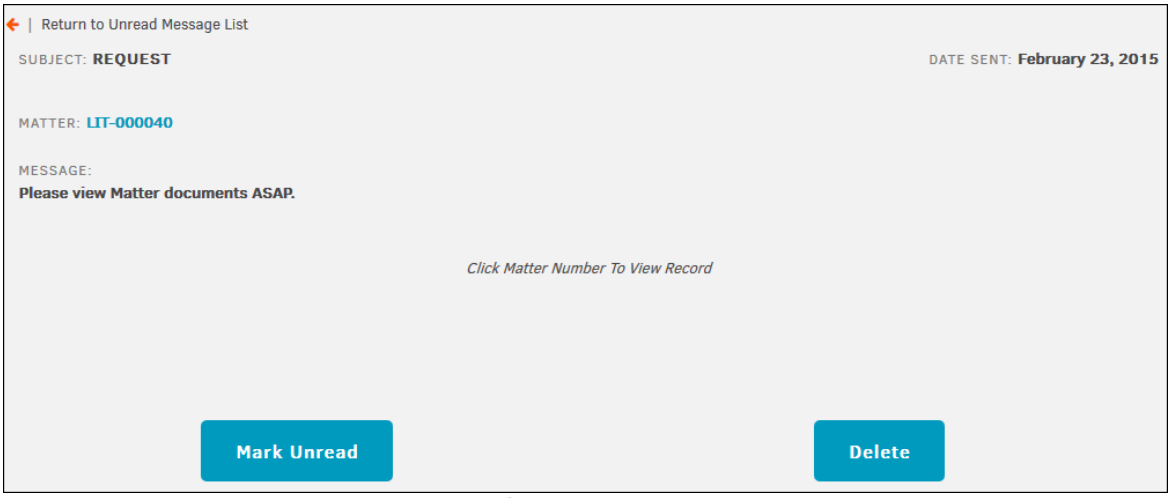
New Messages

	SENT	SUBJECT
1.	02/18/15	Matter Text Added
2.	02/18/15	Matter Text Added
3.	02/18/15	Matter Text Added

New Message List

The open message includes subject title, date sent, matter record associated with the message, and the message detail.

Select the matter number to view the matter record.



Open Message

Click **Delete** to remove the message from both the **New Messages** and **Read Messages** lists.

Click **Mark Unread** to keep this message in your **New Messages** inbox.

Use the icon to return to the messages list. The read message no longer appears in your new message list.

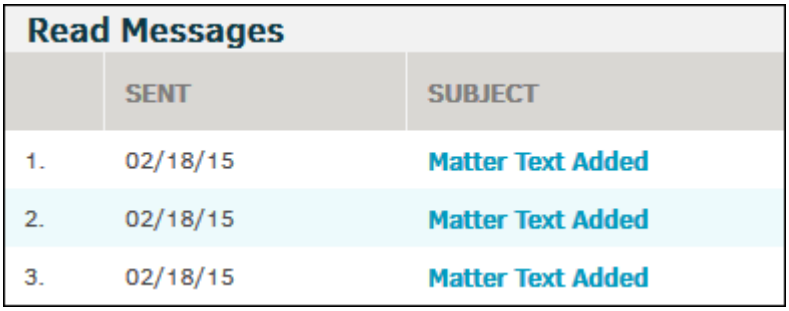
1.5.4.2 Read Messages

From the **Messages** tab, select **Read Messages** to view read messages.

Read Messages Link

All messages that have been previously viewed appear here unless deleted or marked as unread. Your messages appear in chronological order and not in order read.

Click the subject of the message to view details.



Read Message List

The open message includes subject title, date sent, matter record associated with the message, and the message detail.

Select the matter number to view the matter record.

Open Message

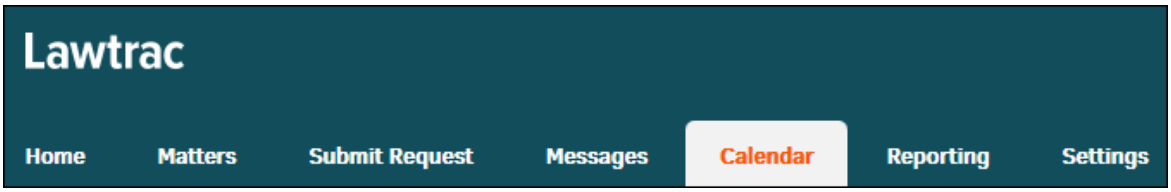
Click **Delete** to remove the message from both the **New Messages** and **Read Messages** lists.

Click **Mark Unread** to return this message in your **New Messages** inbox.

Use the icon to return to the messages list.

1.5.5 Calendar

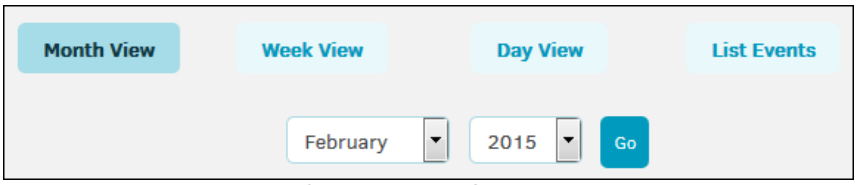
The **Calendar** link across the top navigation bar allows users to view their upcoming events in month, week, or day view format.



Calendar Tab

The calendar defaults to the current month view, but you can change the layout by using the viewing buttons above the calendar.

You can also find a specific month and year by using the drop-down lists, and clicking **Go**.

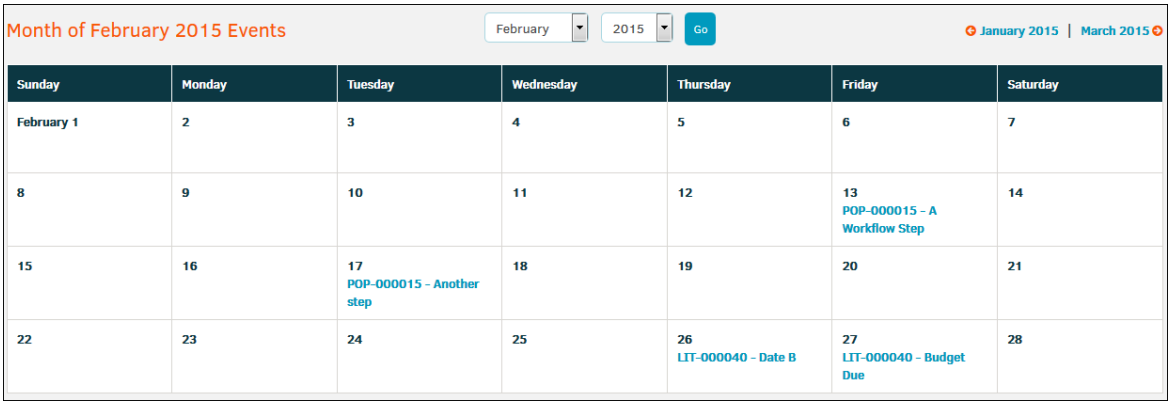


Calendar View Options

Events appear on the calendar as hyperlinks, with the matter number and event subject displayed. Click on the event or matter number to navigate to the matter record's detail page.

View previous or upcoming months by using the hyperlinks at the top right of the calendar.

Note: *Dates on the key personnel calendar consist of key matter dates added by legal. Calendar events are also noted.*



Calendar View

Month View

- Displays all days of the month currently being viewed.
- Month link navigation–links are the previous and next month from the one currently being viewed.

Week View

- Default is to display the current week.
- Drop-down navigation–select the week to display.
- Week link navigation–links are the previous and following week from the one currently being viewed.

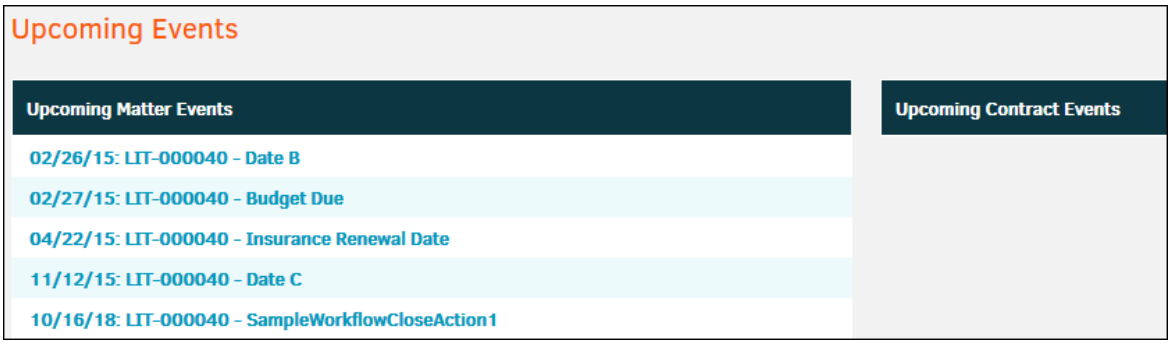
Day View

- Defaults to current day.
- Use drop-down navigation to select a different day.
- Day link navigation–links are the previous and following day from the one currently being viewed.

List Events

- Upcoming matter and contract events are displayed in a list format in chronological order.

- Events are hyperlinks that direct users to the matter or contract details when selected.

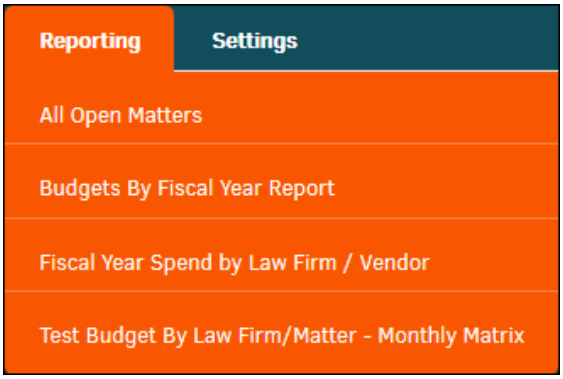


List Events View

1.5.6 Reports

Custom and Ad Hoc reports would need to be reviewed by Lawtrac Report Specialists in order for key personnel to be able to access.

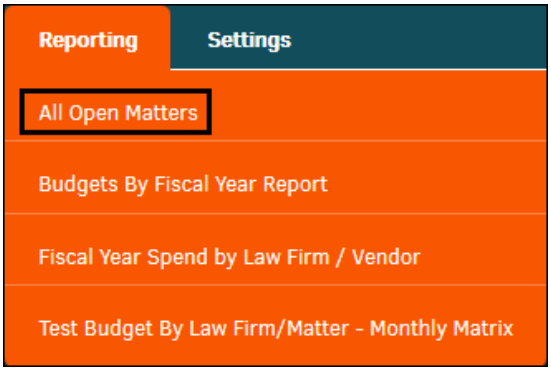
Up to five (5) standard reports can be given to you by the Legal Department. Reports result in information about matters to which you are assigned.



Reporting Tab

1.5.6.1 All Open Matters

From the **Reporting** tab, select **All Open Matters** to view a list of all matters opened in Lawtrac.



All Open Matters Link

Matter records are listed by matter number, matter name, lead, and date opened.

Use the icon in the column header to toggle the list view alphabetically or chronologically.

ALL OPEN MATTERS 1159 RECORDS

Matter No	Matter Name	LEAD	Date Opened
33-5656	Real Estate Contract - Florida Office ,real Est Contract - Florid		01/13/2015
33-5665	Real Estate Contract - Florida Office		01/13/2015
812	Lond Real Estate - Office Lease	Blair Bonnema	01/12/2015
A-00000000	Main Library Matter		12/06/2006
A-00000003	Contract Review: Y. Bailey - Vendorville	Frank Scott	05/16/2006
A-00000005	Jordan Intellectual Property Filings		06/07/2006

All Open Matter Reports

1.5.6.2 Budgets by Fiscal Year Report

From the **Reporting** tab, select **Budgets by Fiscal Year Report** to view a list of all budgets created in a specific fiscal year.

Budgets by Fiscal Year Link

Select a year from the Fiscal Year drop-down list, then click **Run Report**.

Reports are listed by budget number, matter number, firm, type of budget, frequency, and amount.

Fiscal Year: 2015 Run Report

60 RECORDS: 2,518,169.86

BUDGET	MATTER	FIRM	TYPE	FREQUENCY	AMOUNT
2015-81828-18180	33-5665	Fischer And Dogue	Task	Monthly	0.00
2015-380-18189	A-00000389	Aatest	Task	Lifetime	0.00
2015-380-18117	A-00000389	Asdfadsf			0.00
2015-50034-5837	A-00042932	Bennett And Ward - Crested Butte, Co	Phase	Lifetime	30,000.00
2015-2672-18094	A-00042994	Bauman Law	Phase	Lifetime	199,000.00
2015-3495-18090	A-00047824	Richmond Associates	Phase	Lifetime	45,000.00

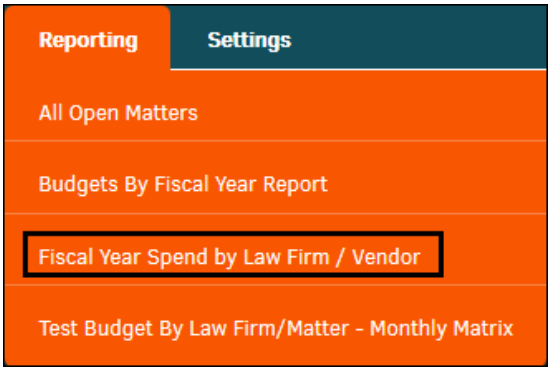
Budgets by Fiscal Year

Click on firm name to view all budgets submitted by that firm.

Click on matter number to view all budgets associated with that matter record.

1.5.6.3 Fiscal Year Spend by Law Firm/Vendor

From the **Reporting** tab, select **Fiscal Year Spend by Law Firm/Vendor** to view a list of all budgets created in a specific fiscal year by a specific firm or vendor.

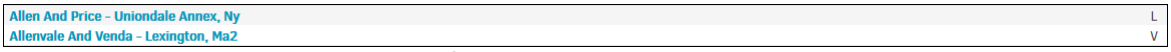


Firm/Vendor Fiscal Year Spend Link

1. Select a fiscal year from the drop-down list.
2. Select either "All" or "Posted" invoices from the Invoices drop-down list.
3. Find fiscal year spend by company name by entering all or part of the firm/vendor name in the text box, and then specify whether the text is the beginning, middle, or end of the firm/vendor name.
4. Click **Go**.

Search for Fiscal Year Spend

The list contains the firm/vendor name, and indicate whether that company is a firm or vendor with either the letter 'L' (Law Firm) or 'V' (Vendor) on the far right.

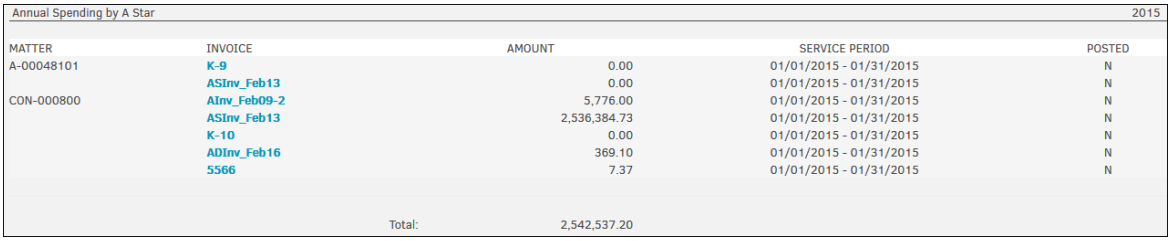


Spend by Firm or Vendor

Click the firm/vendor name to open that company's spend report.

The report lists all invoices by matter record number, the title of the invoice, amount, service period, and whether it has been posted ("N" for no; "Y" for yes; "NA" for not applicable).

The bottom of the page displays the sum of all invoice amounts.

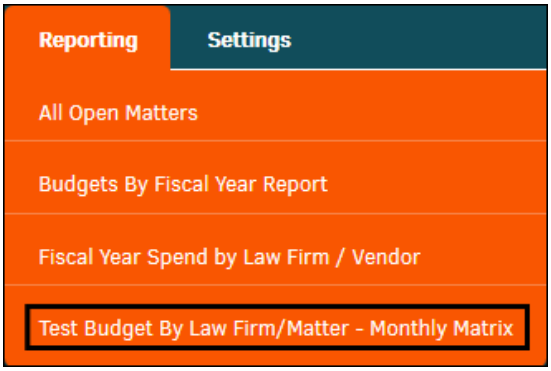


MATTER	INVOICE	AMOUNT	SERVICE PERIOD	POSTED
A-00048101	K-9	0.00	01/01/2015 - 01/31/2015	N
	ASInv_Feb13	0.00	01/01/2015 - 01/31/2015	N
CON-000800	AInv_Feb09-2	5,776.00	01/01/2015 - 01/31/2015	N
	ASInv_Feb13	2,536,384.73	01/01/2015 - 01/31/2015	N
	K-10	0.00	01/01/2015 - 01/31/2015	N
	ADInv_Feb16	369.10	01/01/2015 - 01/31/2015	N
	5566	7.37	01/01/2015 - 01/31/2015	N
	Total:	2,542,537.20		

Opened Spend Report

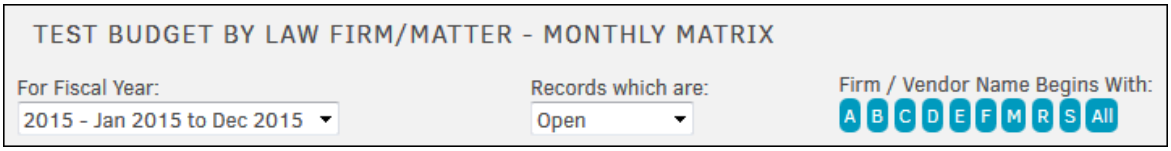
1.5.6.4 Test Budget by Law Firm/Matter: Monthly Matrix

From the **Reporting** tab, select **Test Budget by Law Firm/Matter: Monthly Matrix** to view budgets by firms and vendors on a monthly basis.



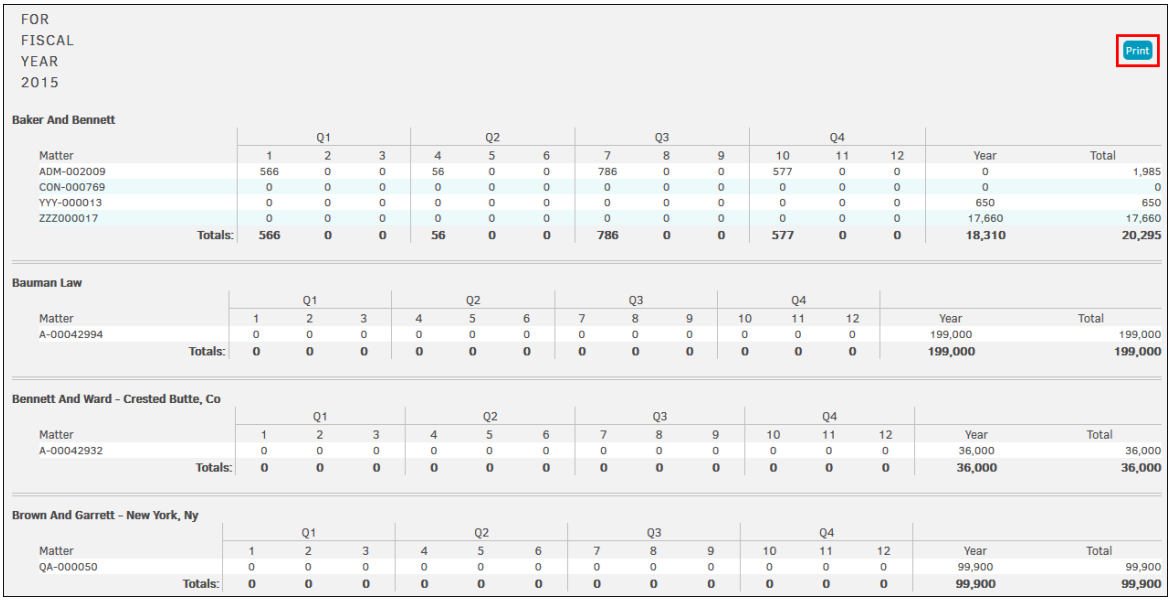
Test Budget Link

1. Select a fiscal year from the drop-down list.
2. Filter records that are open, closed, or both.
3. Select a letter that corresponds to the firm/vendor name.



Law firms and vendors are listed in alphabetically order, showing the quarterly, year end, and total sums for each matter record assigned.

Click **Print** at the top right corner of the list to print the report in as an Excel spreadsheet, Adobe PDF, or Word document. Click **Close** to cancel and return to the report list.



FOR FISCAL YEAR 2015

Print

Baker And Bennett

	Q1			Q2			Q3			Q4				
Matter	1	2	3	4	5	6	7	8	9	10	11	12	Year	Total
ADM-002009	566	0	0	56	0	0	786	0	0	577	0	0	0	1,985
CON-000769	0	0	0	0	0	0	0	0	0	0	0	0	0	0
YYY-000013	0	0	0	0	0	0	0	0	0	0	0	0	650	650
ZZZ000017	0	0	0	0	0	0	0	0	0	0	0	0	17,660	17,660
Totals:	**566**	**0**	**0**	**56**	**0**	**0**	**786**	**0**	**0**	**577**	**0**	**0**	**18,310**	**20,295**

Bauman Law

	Q1			Q2			Q3			Q4				
Matter	1	2	3	4	5	6	7	8	9	10	11	12	Year	Total
A-00042994	0	0	0	0	0	0	0	0	0	0	0	0	199,000	199,000
Totals:	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**199,000**	**199,000**

Bennett And Ward - Crested Butte, Co

	Q1			Q2			Q3			Q4				
Matter	1	2	3	4	5	6	7	8	9	10	11	12	Year	Total
A-00042932	0	0	0	0	0	0	0	0	0	0	0	0	36,000	36,000
Totals:	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**36,000**	**36,000**

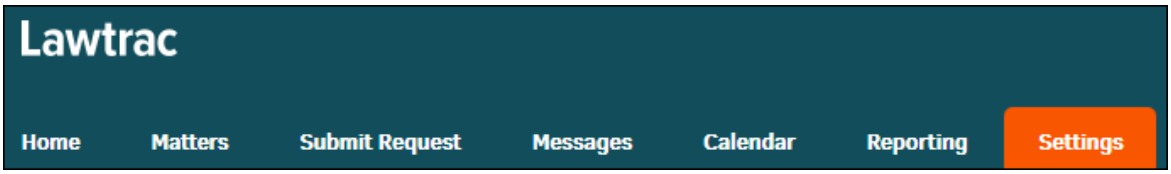
Brown And Garrett - New York, Ny

	Q1			Q2			Q3			Q4				
Matter	1	2	3	4	5	6	7	8	9	10	11	12	Year	Total
QA-000050	0	0	0	0	0	0	0	0	0	0	0	0	99,900	99,900
Totals:	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**99,900**	**99,900**

Monthly Matrix

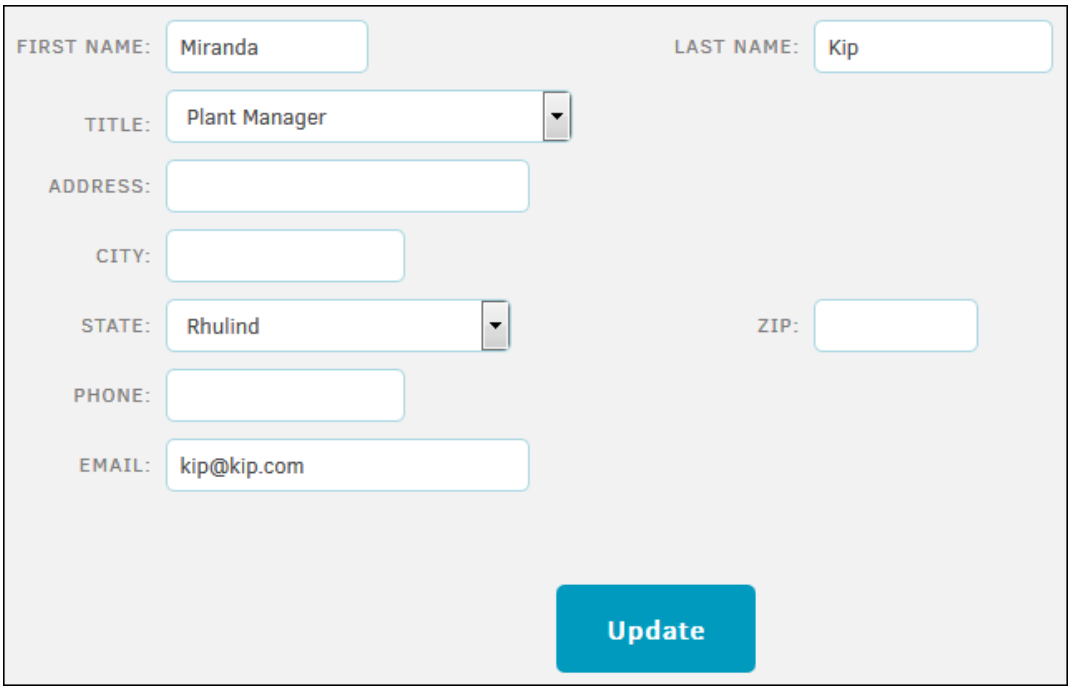
1.5.7 Settings

If you need to update your contact information, change your user name, etc. use the **Settings** link. ***Note:*** *When changing user name and/or password, follow the Security Rules listed for your company.*



Settings Tab

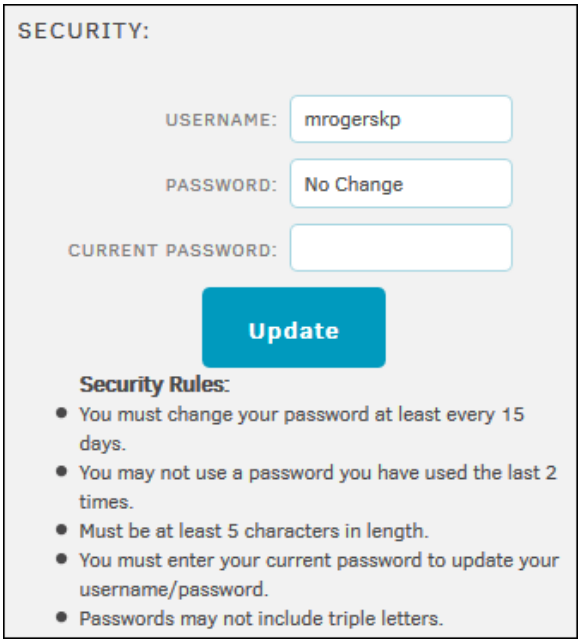
You can change your contact information by typing directly into the appropriate text box or choosing an option from the drop-down lists. Click **Update** to save changes.



Contact Information

On the right side of the page under **Security**, you can change both your user name and password. If you are not updating your password, do not make any changes to the text in the Password text box. Click **Update** to confirm.

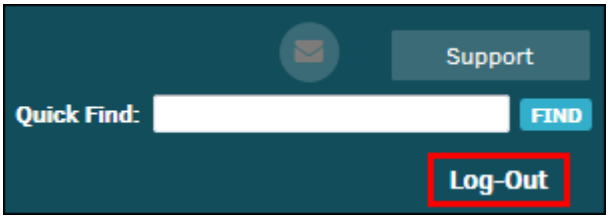
Note: *If your new user name and password does not meet the criteria stated under* ***Security Rules*** *(see below), no changes are made and you are notified of the requirements in red text.*



Security Options

1.6 Log Out

Always log out by using the **Log-Out** link when leaving the application. Logging out each time preserves the security of your site.



Log Out of Lawtrac

1.7 Read-Only Users

Your Legal Department may have the Submit feature turned off for key personnel. If this is the case, you will not have the **Submit Request** links, however, you are able to view matters to which you are assigned.

If you feel that the Submit feature has been turned off in error, please contact your site administrator.