MITRATECH

Lawtrac® 4.0

Outside Counsel Guide for Firms and Vendors

Lawtrac 4.0 Outside Counsel Guide

Document ID: lt_40_OCGuide, published on 10/31/2017

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CONTACT US:
Mitratech Holdings, Inc.
5001 Plaza on the Lake Suite 111, Austin, TX 78746
Phone: (512) 382-7322

Acknowledgements

This product includes software developed by the following organizations:

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

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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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Outside Counsel User Guide

Version 4.0

1.1 Introduction

Congratulations on your selection of the Lawtrac application, the premiere Matter Management software product on the market today. With Lawtrac's "Total Solution", you are well on your way to achieving your company's goals by better managing matter, expenses, budgets, documents, records and eBilling.

At Mitratech, our goal is to partner with you in this venture. We have designed Lawtrac to help you succeed, and we stand prepared to provide industry-leading support whenever you need us, beginning with this user guide.

For those already familiar with Lawtrac, you know that our user guide is designed to enable quick reference to the information you're looking for. For those new to Lawtrac, we highly recommend reading this guide as you get to know the application. By trying the various tasks described, you'll become more comfortable with Lawtrac and all it has to offer. At the very least, new users should read Chapters 1-4, which deal with navigating through the program environment.

Customizing Lawtrac

The Lawtrac application (sometimes referred to in this user guide as "the application" or simply "Lawtrac") is designed as a flexible tool. One aspect of that flexibility is that your company can customize many features of the application. For example, your company may:

- Customize the home page to highlight key information and resources specific to your needs
- Turn off some of the modules or features
- Rename some areas or fields
- Set up layers of security
- Make other high-level choices that determine how Lawtrac appears and functions on your site

Because of this customization, and especially because of the security settings, what you see when you log in may vary in some ways from what you see in the screen-shots included in this user guide.

The instructions and illustrations in the user guide were prepared with all of the modules and most of the features turned on, and from the log-in of a database administrator with full view/edit access.

Terminology

As with any software, Lawtrac utilizes its own terminology to define various roles of users and aspects of the application. Some of the following terms are common, but may not be used in their most "common" sense. Other terms may be new to you. Understanding the following terminology is extremely helpful as you read the user guide and use Lawtrac.

Base Currency	The currency type your Lawtrac application is set to. Also known as "Currency of Record".
Browser	A browser, also known as a Web browser, is a software application used to locate and display Web pages. The two most popular browsers are Netscape Navigator and Microsoft Internet Explorer. Most can display graphics as well as text. In addition, most browsers can present multimedia information, including sound and video, though they require plug-ins for some formats. Lawtrac is optimized for use with Internet Explorer 9 or newer, and the latest versions of Chrome and Firefox.
Business Hierarchy	The Business Hierarchy is the second of two matter hierarchy systems used in Lawtrac. This hierarchy has two user-definable categories, with 10 levels under each. By default, these are called **Product** and **Business Unit**. Your site administrator may re-caption these fields with terms more appropriate for your company.
• **Product** **(Business Hierarchy Type4)**	This category is used to track the type of business you operate. This classification can be used to track information down 10 levels, which can be linked or unlinked. If your company is primarily service oriented, use this classification to track each of those services.

• **Business Unit** **(Business Hierarchy Type5)**	Not only is this classification used to indicate what business unit the legal department is working for but it is also used to maintain interface codes for Accounts Payable systems. This classification can also track down 10 levels, which can be linked or unlinked.
Button	In Lawtrac, buttons are hyperlinked and clicking them opens up general application modules (via the left Main Menu Navigation Bar aka Left Navigation Bar) or matter-specific data sections (via the right Matter Navigation Bar).
Currency of Record	The currency type your Lawtrac application is set to. Also known as "Base Currency".
Court/Venue (Type7)	Used to identify what third-party has jurisdiction or can render a final decision.
Database	A database is a program that enables you to enter, organize, and select data from tables. The Lawtrac database is organized by fields, records, and tables. A field is a single piece of information; a record is one complete set of fields; and a table is a collection of records. For example, a telephone book is analogous to a database. It contains a list of records, each of which consists of three fields: name, address, and telephone number. Lawtrac is a hypertext database, so any object—whether it's a piece of text, a picture, or a film clip—can be linked to any other object.
Drop-down Menus	Drop-down menus offer a select list of choices that "drop down" when you click the arrow on the right side of a text box; you are then able to make a selection from the list. All drop-down menus must be maintained by your site administrator; these fields do not accept free-form typing.
Entity	Term used when assigning an association to a matter record when not referring to a specific individual. An entity could be a building, company or group of individuals (such as a labor union, other organization or class action grouping).
Finance	Page in the matter record that has fields for defined financial data, reference fields for invoice totals, insurance amounts, payments between parties recorded to the matter—the core financial tracking data for any matter.

Hyperlink	Hyperlinks are words, phrases, numbers, etc., usually underlined, that one can click to be taken to certain data screens enabling smooth navigation through the internet or online database. In this user guide, most are in bold font, though they may not always appear that way in Lawtrac's database.
Key Personnel	Key personnel are employees of a company who are not in the legal department but who may be given direct access to the information in Lawtrac. They have special screens and can only access matters to which they have been associated.
Lead Admin	The lead administrator for a matter may be assigned duties specific to matter types in order to enhance management of particular matter information. Because individual permissions can be set at the activity level, an individual assigned to this position may not be privy to financial or other information within a matter, but may help shoulder the responsibility of ensuring that the matter information is up-to-date and accurate. This is not a required field, but, if used, may be re-captioned.
Lead Paralegal	Often, the second position of responsibility within a matter is reserved for the "primary contact" who is not always a paralegal. This person may be responsible for the day-to-day activities of the matter at the corporate or company level. While the Lead Position slot is responsible for reporting on or managing the matter, the outside law firms, vendors and/or other corporate key personnel can be directed to contact the individual in the secondary position when conducting day-to-day business. This is not a required field, but, if used, may be re-captioned.
Lead Attorney ***or*** **Lead Person**	Usually the attorney that has been assigned primary responsibility for a particular matter; this lead position is reserved for the individual responsible for managing the matter and reporting the status of the matter to the corporate/company hierarchy. This person must have the authority for invoice approval of at least one dollar (US $) and is generally notified when significant updates are made to the matter. This position is based on the premise that the authority to conduct business within a matter can be delegated to others, but never the ultimate responsibility for the matter itself (this position is often referred to as "Primary" in the **Lawtrac User Guide**).

Legal Hierarchy	The primary organizational ranking of any matter. The primary hierarchy consists of three levels or tiers: matter Type, matter Category, and matter Keywords. Site Administrators may re-caption these fields to best fit your company's needs.
• **Matter Type *or* Type** **(Legal Hierarchy Type1)**	The highest of three levels used for classifying a record's legal purpose. Make your Type1 description broad; the lower levels can be more specific. A matter Type is required for every matter record.
• **Matter Category *or* Keyword** **(Legal Hierarchy Type2)**	The second tier of the Legal Hierarchy further classifies the record's reason for being in the matter management system. This information is linked to Type1. If your site manages the Legal Hierarchy by Type2, this becomes the highest level of the hierarchy.
• **Matter Keywords *or* Issues** **(Legal Hierarchy Type3)**	The third tier is used to specifically classify the record. More than one Type3 can be recorded against a record while the two higher tiers have only one defining description. Type3 information is typically linked to a Type1/Type2 combination.
Legal Team **(aka Predefined or In-house Legal Team)**	Each matter should have a "Legal team" even if only one individual is assigned to the matter, and even if your company does not set up the predefined teams described below. The individual who creates the matter can be automatically assigned to the matter's Legal team as a Team Member. The individual selected on the new matter template is also on the matter's Legal team, appearing as the Lead Attorney (Lead Person).
Matters	In this user guide, records are called matters. On your site, records may be called Contracts, Projects, Cases—whatever descriptor your site administrator has selected in order to conform to your company's needs. If you're using a term other than "matter," some of your screen titles and link names may differ from those in the illustrations and documentation in this user guide. Whatever term your company is using, it can be seen throughout the application on your site.
Metadata	Data about other data—metadata are informational fields which are used to classify and further define documents or files in Lawtrac. For example, document file names, document categories, and the date documents that were added are all metadata.
Navigation Bars	Three main menus by which a user navigates around Lawtrac, moving through tables and screens of data. The

	Top Navigation Bar is composed entirely of hyperlinks, while the Left Main Menu Navigation Bar and the Right Matter Navigation Bar are composed of hyperlinks and buttons.
Page Label	Located at the bottom right corner of the screen, the page label provides the ColdFusion file name for the code/ template. You'll need this in communications with Support about issues or errors.
Party	This term is not necessarily used in the true legal sense of "Parties" being Plaintiff and Defendant. In Lawtrac, a "Party" is anyone directly involved with a matter record.
Picklist (UDC6 – UDC10)	While similar to a drop-down menu, clicking into a picklist field displays a list which includes previous text entries. You can select one of the existing entries or key in a new one. If you key in new text, it is added to future selection lists for this field. ***Note:*** *Some picklist fields are activated by your site administrator. Only entries assigned to OPEN matter records appear on the picklist. To select an entry used for CLOSED matters, you must retype it on an OPEN matter record.*
Predefined Legal Team	A group of individuals who can be assigned to a matter as a predefined "work-group." The purpose of predefined legal teams in the Lawtrac application is to save time when initially setting up a matter; subsequent adjustments may be made to the matter record. Your company may group individuals into a Predefined Legal Team for particular kinds of matter such as an Acquisitions or Litigation Team.
Private Matter	Matters in Lawtrac may be classified "Private" by team members in order to limit access to their data fields, documents, etc. The purpose of this designation is to protect particularly sensitive matters from unnecessary exposure. Marking a matter as Private restricts access to the matter to only those directly assigned to the matter's team and to the super user.
Site Administrator **(aka Lawtrac Administrator or System Administrator)**	This is an individual at your site (company) who has access to the Application Administration module, and who has broad rights within the application. Some companies have more than one site administrator.

Status *or* Matter Status (Type6)	Used to define the current "condition" of the record. Examples are Open, Closed, Pending, In Discovery, etc. In conjunction with this field, you can see an "as of" date field, to note the status as of a particular date.
Super User	A super user is someone who has total access to all controls and data for a particular site's Lawtrac application and database, including administrative functions, permissions, etc.
Synopsis	A synopsis is a brief description of a document or its contents that can be used within the **Document Bank**. There is also a Synopsis link on the right-side Matter Menu located within **Text Records**. This provides another text area to make notes regarding a matter. These notes cannot be seen by anyone other than members of your Legal Department.
Table(s)	Forming the basis of Lawtrac's database, tables list various data fields, the length of those fields, and their relationships to other tables.
Team Member	The person who adds a new matter record into Lawtrac is typically assigned to the team working on that matter. Because security settings can restrict everyone except the people assigned to a matter from viewing its records, there has to be at least one person assigned to each matter's team. This prevents matter records from being lost within the Lawtrac application. Depending on the view/edit permissions granted to them, individual team members have full authority to interact with the matter information, as do the team leaders.
Type Outcome	Look-up table defined for use in describing different types or categories of resolutions for the matter.
UDC	User-defined Captions/Fields are fields where Site Administrators can enter captions and determine content specific to your company's needs. For example, Court vs. Venue, Tribunal, Agency, etc.

1.1.1 Legal Hierarchy

Matters are categorized according to a three-tiered "Legal Hierarchy" (Type, Keyword, Issues). Some of the customization is related to this Legal Hierarchy. Different matter types may require different handling. You may see different fields and different options. The levels of the Legal Hierarchy may have different labels on your site. Within this user guide, we sometimes use their database names (Type1, Type2, Type3) for clarification so the Site Administrators can more easily prepare reports and perform database management tasks.

1.1.2 Business Hierarchy

Matters can also be categorized according to a "Business Hierarchy" (Product and Business Unit; or Type4 and Type5). Each of these areas can have multiple levels. Most companies use at least one level of the Business Unit (Type5) Hierarchy. How, and even whether, the other areas are used varies greatly among Lawtrac Online customers.

The word "matter" is used extensively in this user guide, but your site administrator may have changed that label. Your company may be using "Contract" or another term to describe the type of records you'll be tracking within Lawtrac.

1.1.3 Who Can Access Your Data?

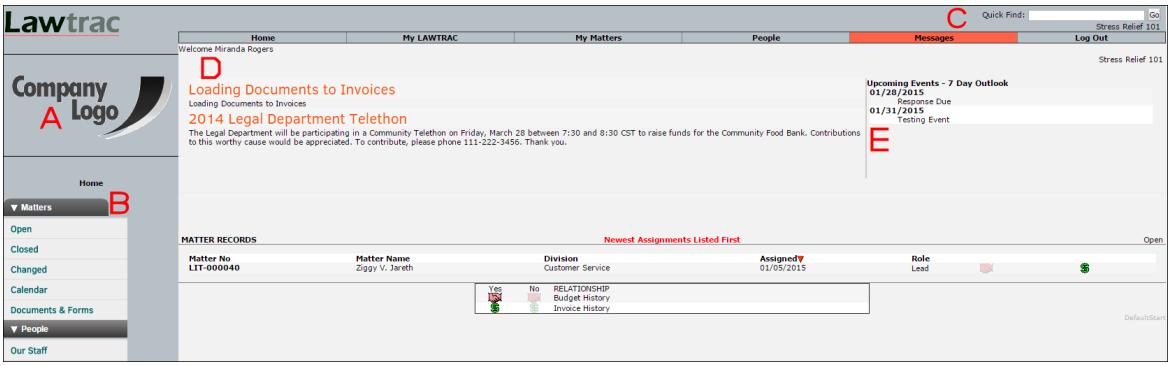
There are references throughout the user guide as to what law firms and vendors can see and do within the application. The descriptions and illustrations assume that individuals from those companies are logging into your Lawtrac site. Contact your site administrator if you are uncertain about who can and cannot access the application.

Just because an external company or individual is listed in the Firms/Vendors Assigned area of a matter does not necessarily mean they can access your data.

1.2 Lawtrac Home Screen

Your home screen displays after you've successfully logged into the Lawtrac application. It is not only the first screen you see, but the screen you visit most often when using Lawtrac. The Home screen is also the location of your personal calendar, where you can easily view the events and reminders that you've entered into this valuable feature.

Access the Lawtrac home screen by clicking the Lawtrac logo, which you'll find in the top left corner of every screen.



Lawtrac Main Page

What You'll See on the Main Page:

A. Company Logo

This area displays the logo that your site administrator has placed on your site. If outside counsel firms are given access to log onto your site for eBilling and/or matter management, they can see this logo on their screens.

Clicking the Lawtrac logo at the top left of the screen from anywhere in Lawtrac returns you to the home page.

B. Main Page Navigation Bar

The Left Navigation Bar is always visible. Use it to access the various modules of Lawtrac.

C. Top Navigation Bar and Quick Find

Quick Find is available on most screens in Lawtrac, and the top menu bar is always visible.

D. Welcome Message

The home page contains a Welcome Message area that can be personalized by your site administrator. This space might be used to display internal business rules about using Lawtrac or notices of new developments within your company.

Notice that your name and position, as recorded on your personnel record in Lawtrac, are displayed above your company's Welcome Message.

E. Personal Calendar & Links

This calendar is unique to your log-in. There are areas in Lawtrac where reminders can be posted to your personal calendar.

The current date is highlighted in orange. Days with matter events associated are hyperlinked on your calendar view. Clicking the hyperlink replaces the Welcome Message text on the home screen with a listing of the events for the indicated date.

Use the ⊟ or ⊞ buttons to move through the months. Any time you need to return to the current month, just click on today's date. You can also click "10 Day Outlook" to display scheduled matter events over the next 10 days.

Note: *This calendar does not display all events for your assigned matter. In order for this calendar to display matter events, they must be placed on your calendar. Events on your personal calendar are designated "P". matter calendar events are designated "M". You can hide the display of your calendar on your home page using the switch in your* ***My Lawtrac****.*

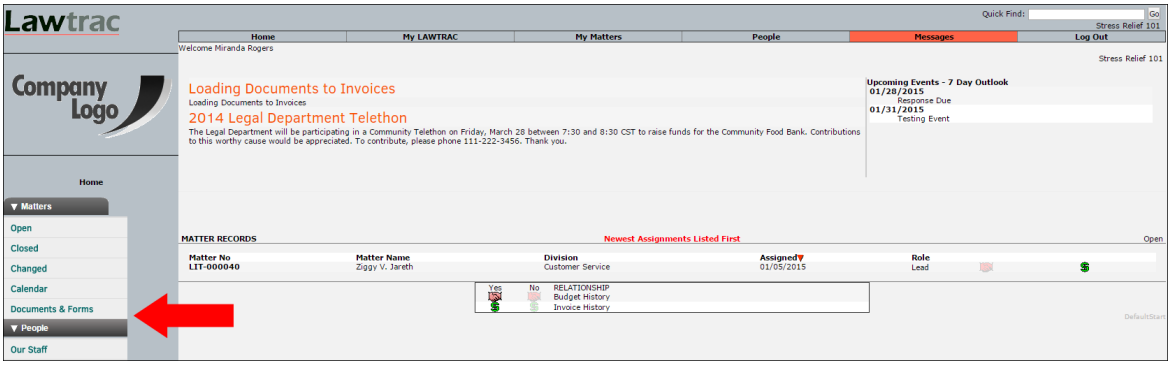
Directly below the calendar you'll find a block of additional links that give you quick access to other valuable resources.

1.3 Main Page Navigation Bar

Lawtrac's home page offers a menu displayed in a Navigation Bar on the left-hand side of the screen. Using this menu allows you to navigate matter records, firms and vendors, invoices, budgets and reports with ease.

Menu buttons expand to reveal hyperlinks. Buttons on the Left Navigation Bar (also known as the Main Menu) are links to the various modules of Lawtrac. All key areas of the application can be accessed from one of these buttons.

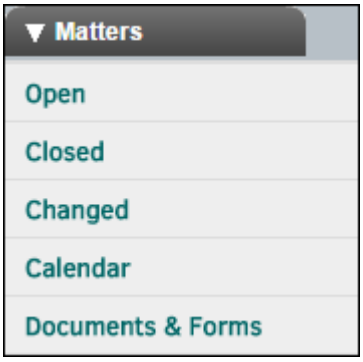
When you first open Lawtrac, all options may initially be expanded. However, once you select a section, only one menu button at a time dilates on a navigation bar. Once expanded, it remains open until you click a different button on that same navigation bar. This eliminates having to scroll through multiple links within multiple button topics.



Lawtrac Menu Sidebar

1.3.1 Matters

Click on the **Matters** tab in the Main Page Navigation Bar to expand the links. While the Top Navigation Bar takes you to all matter records, the Main Page Navigation Bar allows you to view specific records or upcoming matter events.



Lawtrac Menu: Matters

Matter Options:

Page	Function
Open	View open matter records to which you are assigned.
Closed	View closed matter records to which you are assigned.
Changed	View matter records that have had recent adjustments made.
Calendar	View upcoming matter events.
Documents & Forms	View the Documents & Forms directory. Click on the document title to download.

1.3.1.1 Open Matter Detail

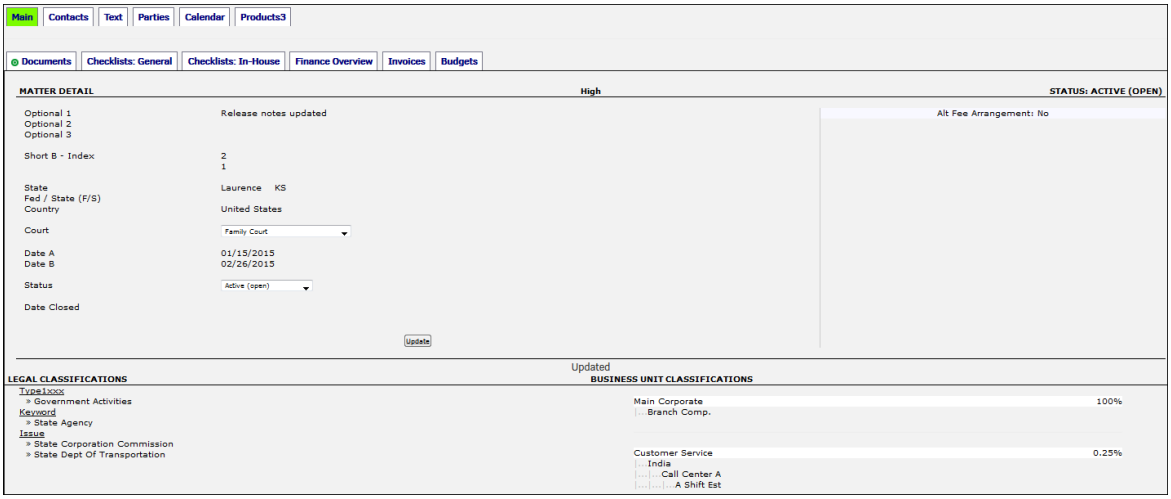
From within a matter record, you can see the following tabs at the top of the page. Click on each tab to navigate through the matter record.

The tabs on the **Matter General Report** page allow screens to load faster and give you the ability to toggle through the criteria most important to you. Your database also remembers the last tab you selected and default to it the next time you return to this screen by hitting the **Back** button on your browser.

Open Matter Tabs

Main

From the **Main** tab at the top of the open matter detail page, you can view information about the incident that the matter record addresses, including legal and division classifications, and view the alternate fee arrangement, if one exists.



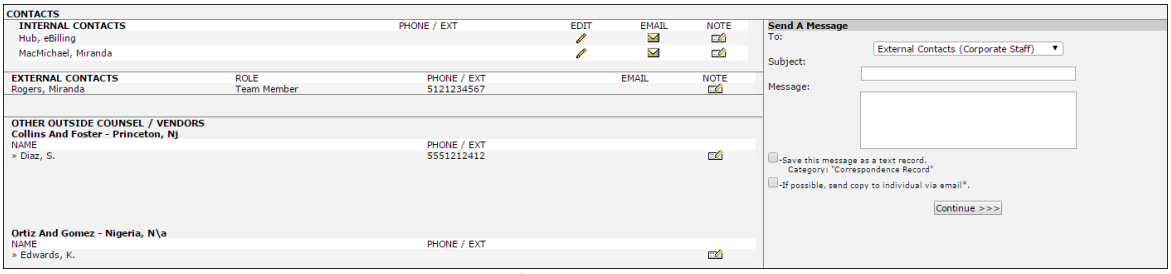
Main Tab

<u>Matter Detail</u>

- View incident location, area, and geographical location. Edit court and status by selecting an option from the drop-down menus
- Click **Update** to save changes

Contacts

From the **Contacts** tab at the top of the open matter detail page, you can view internal and external contacts, other outside counsel/vendor contact information, and send a message to corporate staff or vendors.



Contacts Tab

Internal Contacts

- The icon allows you to view the contact's job title, timekeeper ID, area of expertise, and any comments attached to their profile. You can also release this individual from the matter record by typing "yes" into the text box at the bottom of the page and clicking **Release From Matter**.

  Enter "Yes" To Continue: [ ] Release From Matter

- The icon allows you to send an internal message to the individual. In the new pop-up window, type in the subject of the note in the Subject box, and enter your message in the Message box. Click **Send Message** when finished.

External Contacts

Your external contacts are the individuals that are members of the legal team associated to the matter record. Send an internal note using the icon.

Other Outside Counsel/Vendors

These contacts are individuals belonging to any other firm or vendor associated with the matter record. Send an internal note using the icon.

Send a Message

You can send a message to all external contacts (corporate staff) or all individuals on your **Contacts** page (corporate staff and firms/vendors).

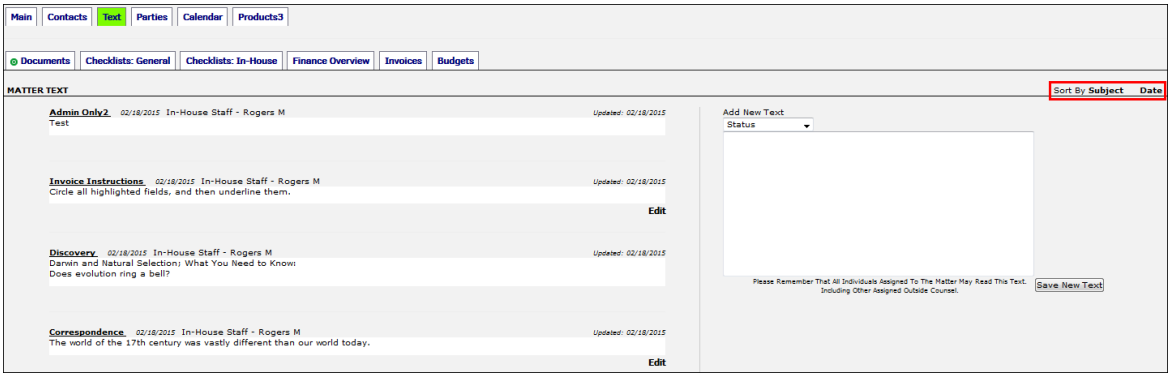
- Type a message title into the Subject text box and your message in the Message box
- Use the checkboxes to save the message as a text record or receive a copy of the message via email
- Click **Continue>>>** to send the message

Text

From the **Text** tab at the top of the open matter detail page, you can view or add text about the matter record status, outcome notes, case summary, etc. The Lawtrac site administrator manages the subjects of the texts that can be selected from the drop-down menu.

Click **Save New Text** to add the new text to your matter text list on the left side. Texts of which you are the author allow you an option to edit.

- Click **Edit** under the matter text to edit the text record or delete the text record
- Click either **Subject** or **Date** on the top right corner to sort the matter text list accordingly



Text Tab

Parties

From the **Parties** tab at the top of the open matter detail page, you can view all parties or entities associated with the matter, the date they were added, and their category.

To add a party or entity to the matter record, please refer to the Add a Party/Entity section.

Calendar

From the **Calendar** tab at the top of the open matter detail page, you can view future matter events and add new events by type of event, event date, time, and detail.

Calendar Tab

- The icon allows you to edit the event
- The icon deletes the event
- The icon allows you to identify an internal staff member as responsible for the calendar event

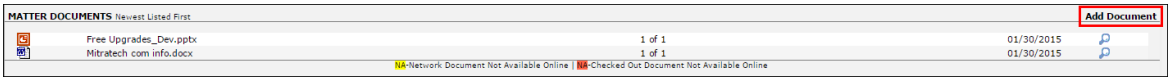
Product

From the **Product** tab at the top of the open matter detail page, you can view and edit the matter product.

Documents

From the **Documents** tab at the top of the open matter detail page, you can view and add documents that are associated with the matter.

A marker in the **Documents** tab indicates that there are documents currently available for viewing.

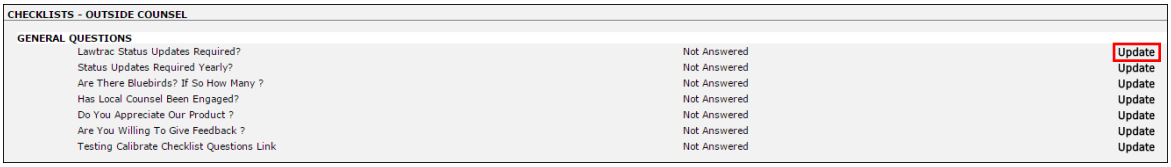


Add Document Link

Checklists: General

From the **Checklists: General** tab at the top of the open matter detail page, you can view and update general questions that are directed to outside counsel.

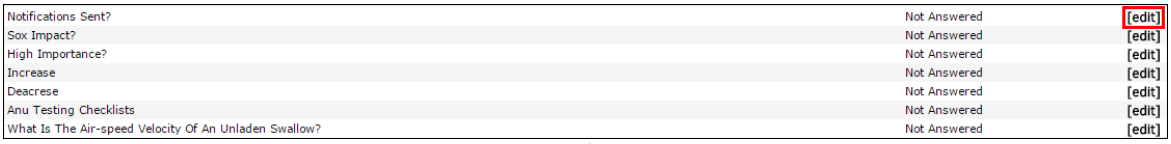
If the matter record contains any legal classification-specific questions, those appear here as well.



Update a General Question Link

Checklists: In-House

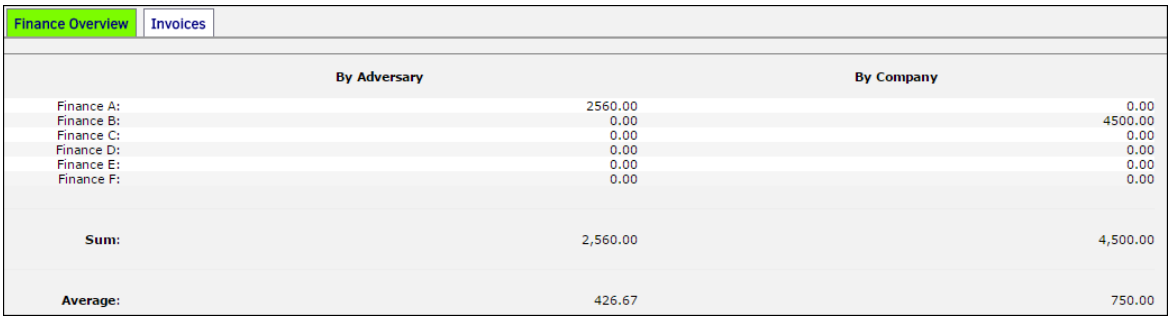
From the **Checklists: In-House** tab at the top of the open matter detail page, you can view and edit questions that are directed to the legal team.



Edit In-House Checklist Link

Finance Overview

From the **Finance Overview** tab at the top of the open matter detail page, you can view financial consideration by adversary and by company.



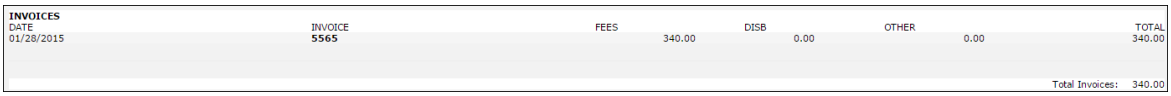
	By Adversary	By Company
Finance A:	2560.00	0.00
Finance B:	0.00	4500.00
Finance C:	0.00	0.00
Finance D:	0.00	0.00
Finance E:	0.00	0.00
Finance F:	0.00	0.00
Sum:	2,560.00	4,500.00
Average:	426.67	750.00

Finance Overview Tab

Invoices

From the **Invoices** tab at the top of the open matter detail page, you can view invoices by date added and the total of all fees and other expenses.

Click on the Invoice number to open the invoice detail page.



Invoices Tab

Budgets

If the matter record does not have a budget on file, this tab may not appear.

From the **Budgets** tab at the top of the open matter detail page, you can view budgets by date added, the type of fee, and the frequency of the budget.

Click on the budget number to open the budget detail page.

Budgets Tab

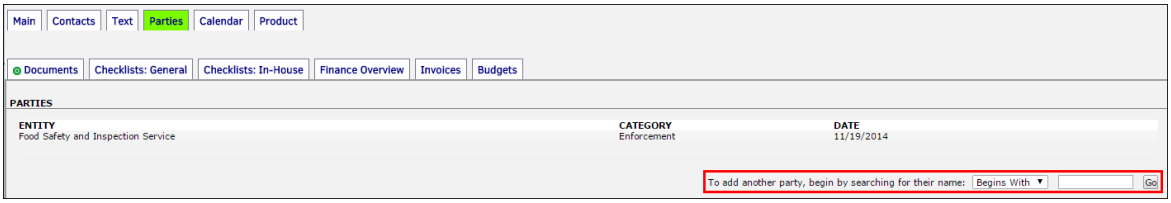
Routing Slips

If the matter record does not have a routing slip on file, this tab may not appear.

The **Routing Slips** tab takes you to a list of all your active routing slips, with hyperlinks to the associated matter or document. The type of routing slip (Matter or Document) is indicated along with a due by date and reviewed status ("Yes"/"No").

1.3.1.1.1 Add a Party/Entity

To add a party or entity, select the **Parties** tab within a matter record.



Add a Party/Entity

You can search for a party/entity by the start of their name, the end of their name, or a text that the name contains by selecting an option from the drop-down list.

Type the search criteria into the text box, then click **Go**. Single letter searches are accepted.

When the search results are listed, click the icon to view the party's detail and make a new matter relationship. If there is an icon in place of , that party is already associated with the matter.

Confirm New Matter Relationship

Identify the new party's relationship with the matter by making a selection from the drop-down menu.

Add the party/entity by clicking **Save**.

1.3.1.1.2 Add an Upcoming Event

From the **Calendar** tab at the top of the open matter detail page, you can view future matter events and add new events by type of event, event date, time, and detail.

Calendar Tab

- The icon allows you to edit the event
- The icon deletes the event
- The icon allows you to identify an internal staff member as responsible for the calendar event

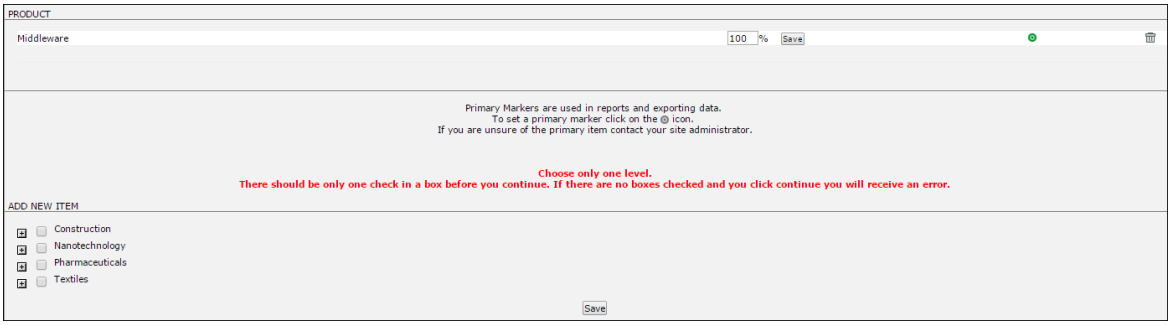
Add an Upcoming Event

1. Select the type of event that is to occur from the drop-down menu below the existing event list.
2. Click the icon to choose the event date.
3. Enter the time the event is to start by selecting an hour from the first drop-down list, and minutes from the second list.
4. Enter details into the large text field if applicable.
5. Click **Save Event**.

1.3.1.1.3 Edit Matter Product

The matter product can be edited from the **Product** tab within an open matter record.

Click on **Edit**, located at the top right side of the screen. The following page is displayed:



Edit Matter Product

- Change existing percentages by typing into the text box, then click **Save**. The green marker indicates the product is primary.
- The icon deletes a product.
- To add a new product item, select a checkbox next to the product to be added and click **Save.**
- Click on the icon to view subcategories, if any exist. Click the icon to collapse the subcategory option.

When the new item appears in the product list, you are able to adjust the percentages and use the green marker to change the primary.

1.3.1.1.4 Add or Edit a Document

You can associate documents with the matter record from the **Documents** tab within an open matter.

Click on **Add Document**, located at the top right side of the screen. The following page is displayed:

Add Matter-Related Documents

1. Click **Browse**.
2. From the opened file explorer, select the desired document to be uploaded and click **Open**.
   Note: *Acceptable file types are listed by clicking the icon. If you attempt to upload a file type different from those listed, the document does not upload and you receive the following error message:*

Illegal File Type Error

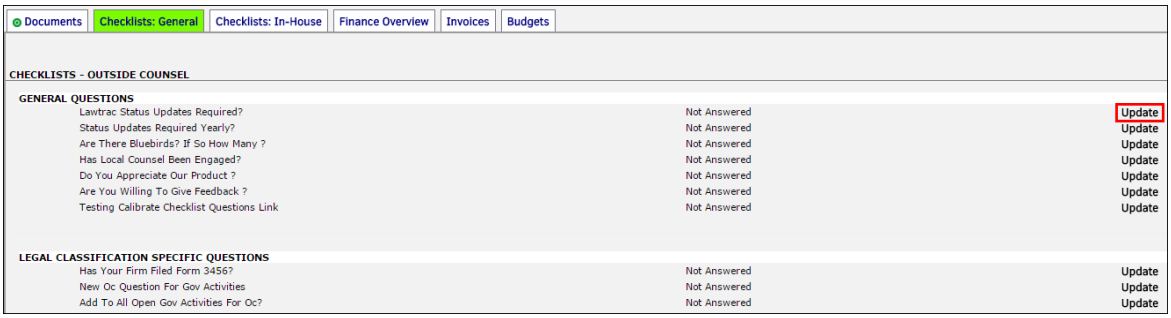
3. Select a category from the drop-down list and identify the author, typist, or synopsis, if necessary.
4. Click **Continue>>**.

Edit a Document

- Click the document/file type icon to the left of the document name to download the document to your computer.
- Click the to edit the document. Be sure to click **Save** to confirm changes.

1.3.1.1.5 Update General Questions

To answer a general checklist question or set a follow-up reminder, select the **Checklists: General** tab within a matter record.



Update General and Legal Questions

Select **Update** on the far right. The Lawtrac site administrator has selected the acceptable answers for the question.

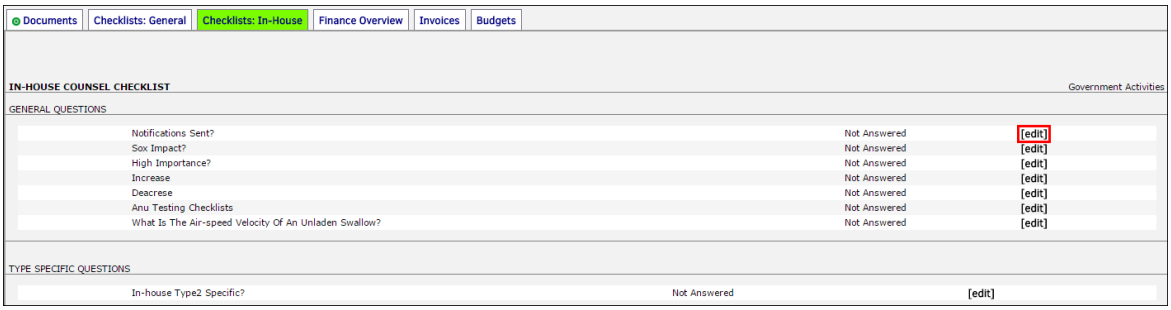
Click on one of the radio buttons to give an answer, and click the checkbox to create a follow-up reminder. The follow-up date can be adjusted by typing into the date field.

Click **Save**.

You now see the answer in the middle column on the **Checklists: General** page.

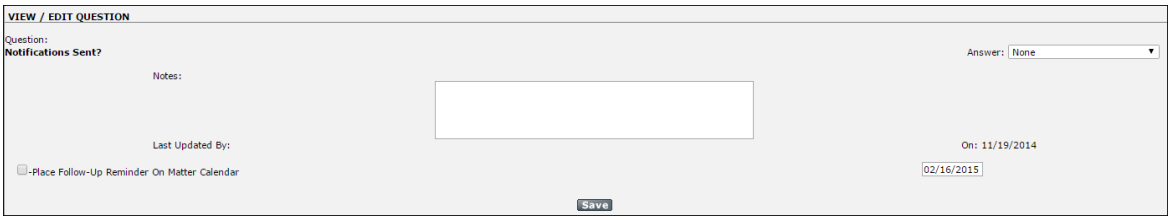
1.3.1.1.6 Edit In-House Checklist

From the **Checklists: In-House** tab at the top of the open matter detail page, you can view and edit questions that are directed to the in-house legal team.



Edit the In-House Checklist

Click **[edit]** to add notes, place a follow-up reminder on your matter calendar, or answer the question.



View/Edit Question

In the top right corner of the screen, select an option from the Answer drop-down menu to answer the question. The Notes text field can be used to elucidate your answers.

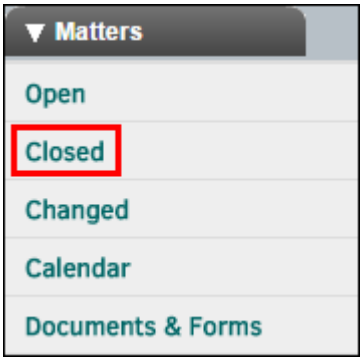
To create a follow-up reminder, click the checkbox on the lower left side of the screen, then enter a date in the corresponding date field on the right.

Click **Save** to confirm any changes.

1.3.1.2 Closed Matters

Matters can be closed by the matter's in-house legal team or by a site administrator.

Select **Closed** from the **Matters** tab in the **Main Page Navigation** sidebar to view all matter records with which you are associated that have been closed.



Matters: Closed

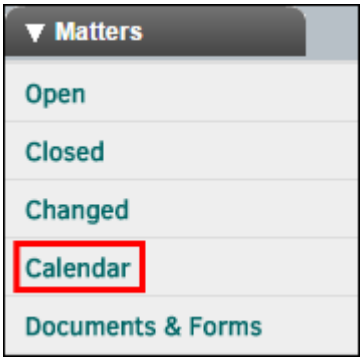
Click on the matter number to be taken to the matter detail page. You can make any changes that you were able to make when the matter was open.

Note: *The Lawtrac database considers a matter record "CLOSED" only when the Date Closed field is populated, regardless of what is in the Status field. The date on which the matter was closed is located in the Matter Detail section of the Main tab.*

Date Closed

1.3.1.3 Calendar

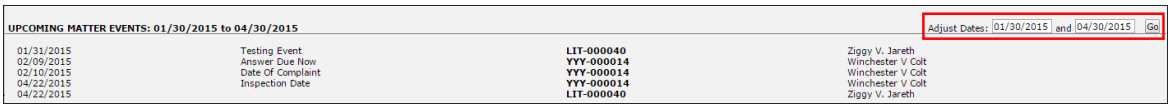
Select **Calendar** from the **Matters** tab in the Main Page Navigation sidebar to view all upcoming matter events for the next three (3) months.



Matters: Calendar

Click on the matter number to be directed to the matter detail page to "jump" to the **Calendar** tab within the record, where you can add, edit, or delete events.

To view upcoming events occurring more than three months from the current date, use the date fields in the top right corner of the page to adjust the dates. Click **Go**.



Adjust Upcoming Event Date View

1.3.2 People

Click on the **People** tab in the **Main Page Navigation** sidebar to expand the links.

The **People** tab in the **Main Page Navigation** sidebar is a great resource for getting Legal Staff member information quickly, as well as looking up Firms, Vendors, Key Personnel, Parties, and Entities.

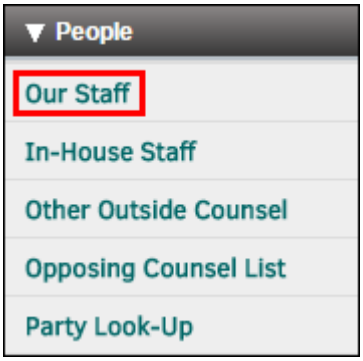
Lawtrac Menu: People

People Options:

Page	Function
Our Staff	View all staff members and add new.
In-House Staff	View your Internal Legal Staff roster and send an email or internal note.
Other Outside Counsel	View a list of other collaborating firms that are associated with a common matter record.
Opposing Counsel List	View a list of opposing counsel that are associated with a common matter record.
Party Look-Up	Use this tool to find a specific party or staff member.

1.3.2.1 Our Staff

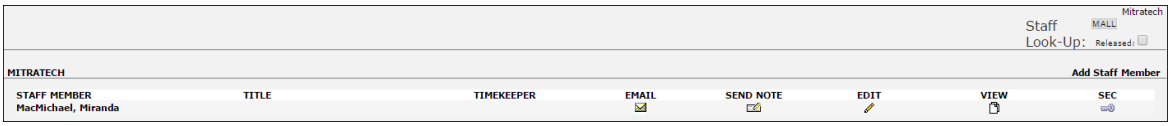
Select **Our Staff** from the **People** tab in the **Main Page Navigation** sidebar to view all individuals that have been added to Lawtrac as members of your staff.



People: Our Staff

At the top right corner of the page, you can use the alphabet buttons to filter your staff list by their surname initial, or click **All** to view all employees.

Click the Released checkbox to view only individuals who have been released from a matter record.



Our Staff List

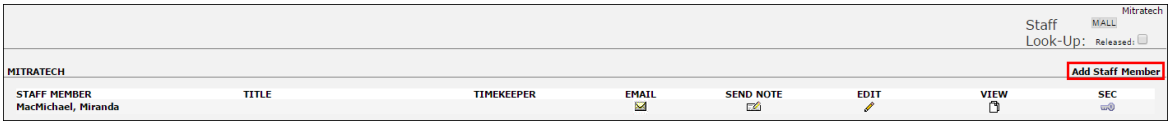
Use the following icons to navigate or make changes to staff profiles:

- — Send the individual an email. The individual must have their email address populated in their personnel record. Clicking this icon launches your email application and any message is sent through those channels.
- — Send the individual an internal note (they are only able to view this note after logging in to Lawtrac).
- — Edit the individual's profile.
- — View the individual's profile. The profile page displays additional contact information, comments entered by the site administrator, and a list of open matter associations. Use this link to obtain key personnel mailing addresses and fax numbers when those fields have been populated within their personal profiles.
- — View or change an individual's permissions and security settings.

Note: *Depending on your role that the site administrator has granted, some options may not be applicable.*

1.3.2.1.1 Add Staff Member

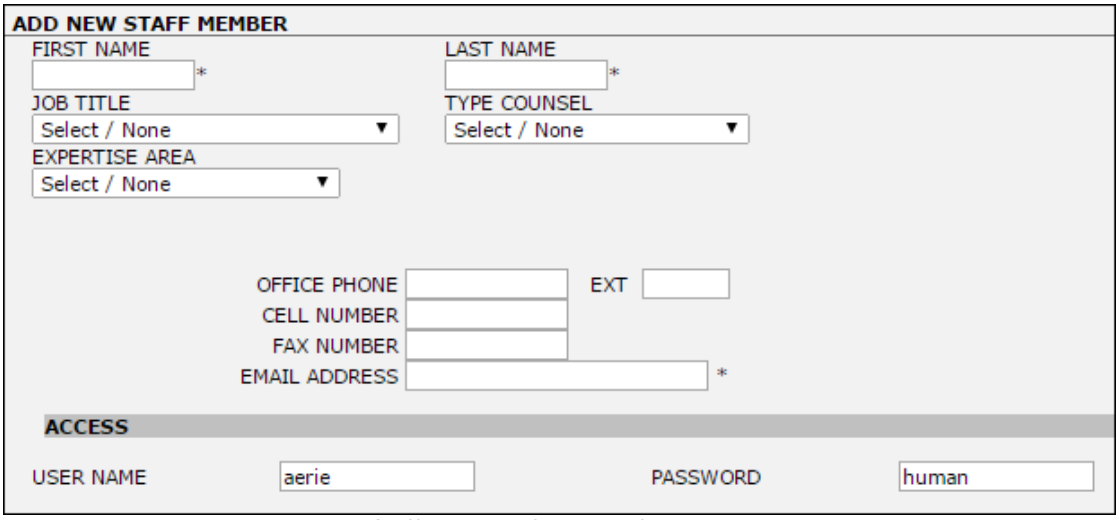
To add a member to your staff, go to **Our Staff** in the **People** section of the **Main Page Navigation** sidebar, then click **Add Staff Member**.



Add Staff Member

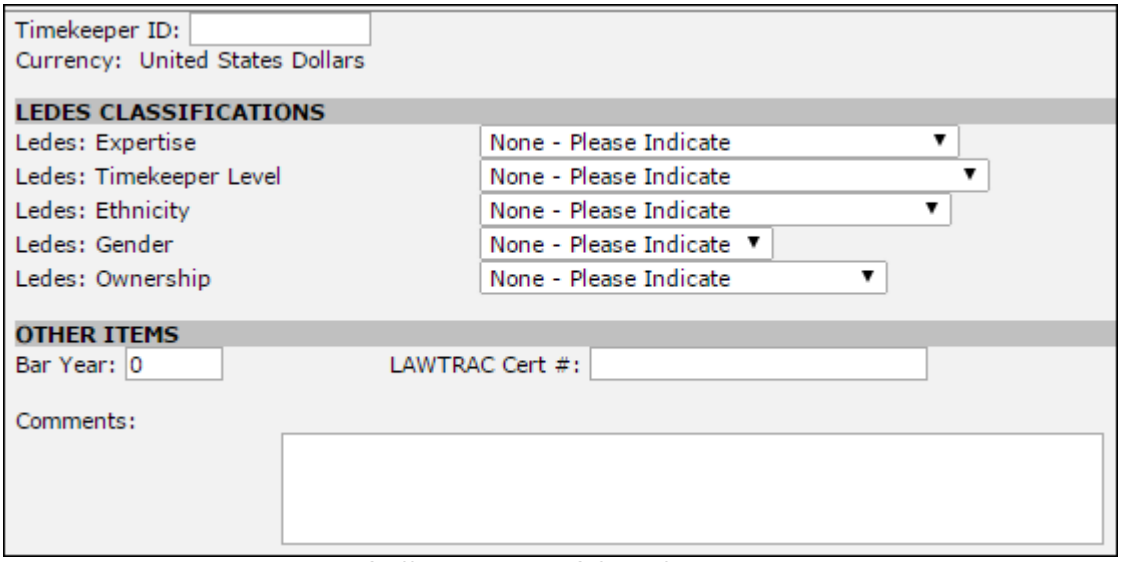
On the left side of the page, start by entering the new staff's name, job title, and contact information. First name, last name, and email address are required.

The options displayed in the drop-down menus are governed by your site administrator; he or she can add necessary information if none is provided.



Staff Member Contact Information

On the right side of the page, enter the necessary information if the staff member is to be a timekeeper or may have a rate card. It is important that the Timekeeper ID is unique to avoid duplicate codes in reporting.

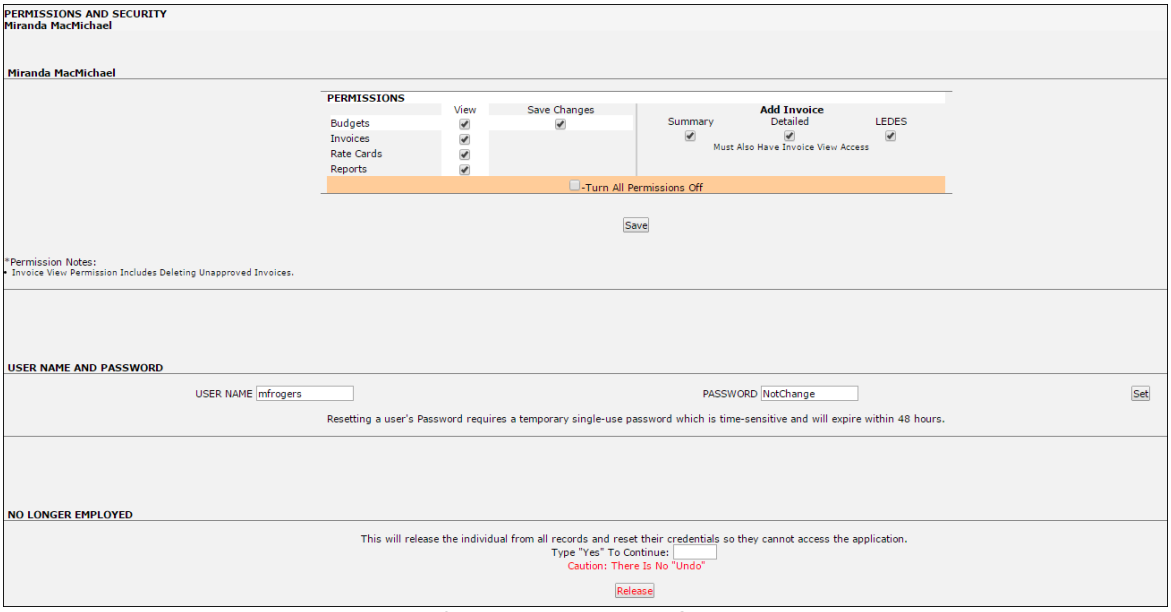


Staff Member LEDES Classifications

Click **Save** at the bottom of the page to confirm and add the individual to your staff list.

1.3.2.1.2 Permissions and Security

If you have the rights to alter permissions and security settings for a staff member, you can do so by clicking the icon next to an individual's name on the **Our Staff** page.



Profile Permissions and Security

Permissions allow the individual to add invoices, budgets, rate cards, or reports to matter records.

Select the desired permissions by clicking the checkboxes, then click **Save**.

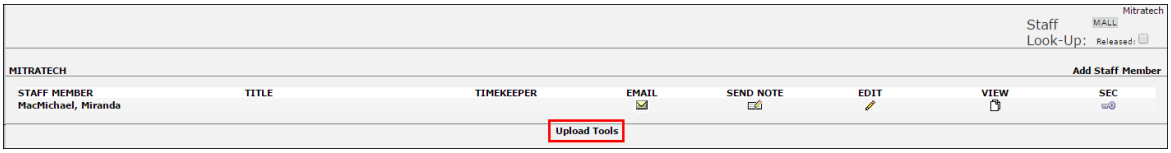
You can also change the individual's user name and password, or release the individual from all associated matters. After changing the user name and password and clicking **Set**, the individual is notified via email to use their one-time use password within 48 hours to reset their information.

To release an individual from all associated matter records, type "Yes" into the bottom text box, then click **Release**.

1.3.2.1.3 Administrator's Personnel Tools

To access **Administrator Personnel Tools**, click **Upload Tools** at the bottom of the **Our Staff** page.

Note: *You only have access to this page if you have been given Administrator permissions.*



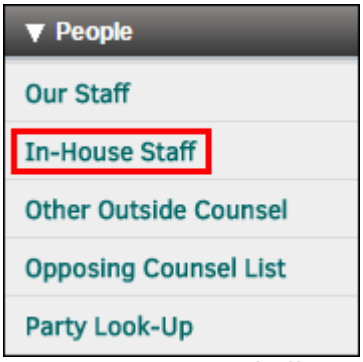
Select Upload Tools

The **Administrator Personnel Tools** page contains information such as your company ID number, firm roster with table IDs, and the ability to upload or update employee files with records not found in the database.

To upload or update employee files, click **Choose File**, and make a selection from your file explorer. Click **Open** and then **Continue>>>**.

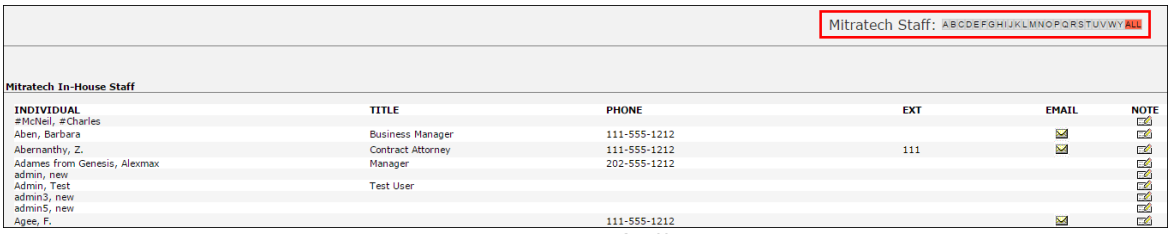
1.3.2.2 In-House Staff

Select **In-House Staff** from the **People** tab in the **Main Page Navigation** sidebar to view all individuals that have been added to Lawtrac as members of the internal legal department.



People: In-House Staff

Use the alphabet buttons at the top of the page to filter the in-house staff list by surname initial. Select **All** to view the entire list of In-House staff. **All** is the default view.



Filter In-House Staff List

Use the following icons to contact the staff members:

- — Send the individual an email
- — Send the individual an internal note (they are only able to view this note after logging in to Lawtrac)

1.3.2.3 Party Look-Up

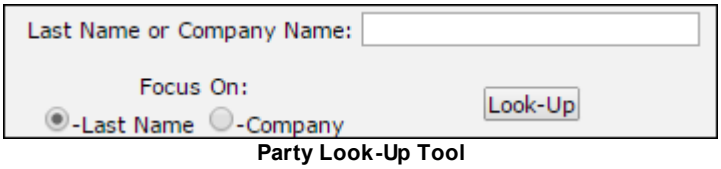
Use this tool to find a specific party or staff member, or to maintain data integrity and refrain from having the same person or company in the database more than once.

People: Party Look-Up

Type the individual's surname or the name of the company into the text box. There is no minimum character link, but entering as many characters as possible may help narrow results. Be careful not to make your search too broad (for example, the letter “e”) as you may have too much data to look at; conversely, your search shouldn’t be too narrow (for example, Lori White) as different spellings may affect your search results.

Use the radio buttons to specify if the name you entered was the individual's last name or the company name.

Click **Look-Up**.



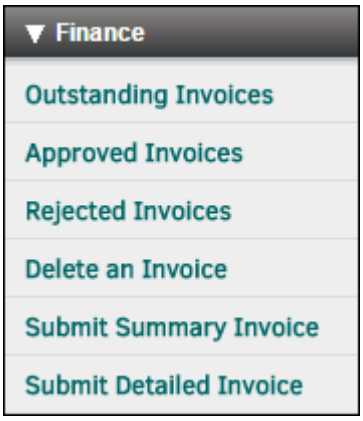
Party Look-Up Tool

The search results show the party’s name (last, first), information from their “Classification” field, their city (if applicable) and their phone number. Only the individual’s name is required for entry into the database, so it is possible for the other fields to be blank.

1.3.3 Finance

Click on the **Finance** tab in the **Main Page Navigation** sidebar to expand the links.

From here you can view, delete, or submit an invoice.



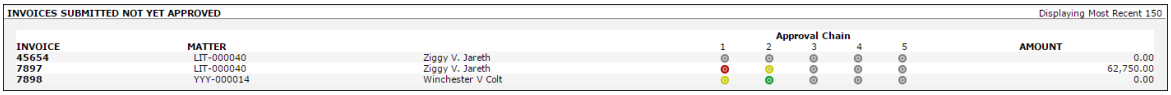
Lawtrac Menu: Finance

Finance Options:

Page	Function
Outstanding Invoices	View a list of all invoices awaiting approval or rejection.
Approved Invoices	View a list of all approved invoices.
Rejected Invoices	View a list of all rejected invoices.
Delete an Invoice	Delete an invoice that has been submitted but not approved. Click the icon to permanently delete the invoice.
Submit LEDES Invoice	Upload a LEDES-compliant invoice.
Submit Summary Invoice	Submit a Summary Invoice.
Submit Detailed Invoice	Submit a Detailed Invoice.

1.3.3.1 Outstanding Invoices

The **Outstanding Invoices** hyperlink in the **Finance** tab of the **Main Page** sidebar displays all invoices that have not been approved. Rejected invoices also appear on this page.



Outstanding Invoice List

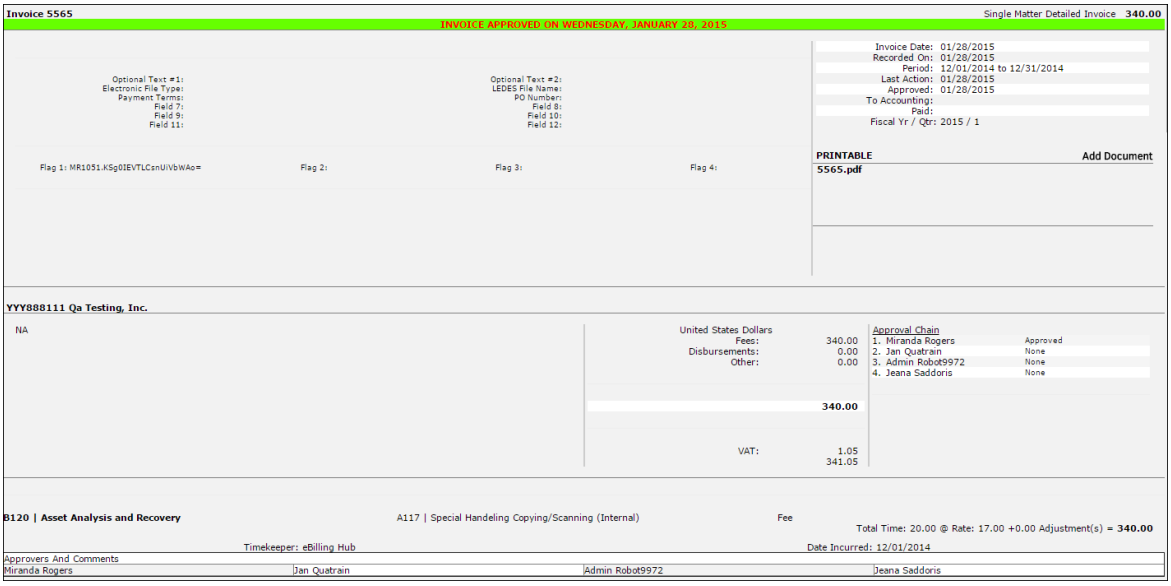
Click the invoice number to open the invoice detail page.

Under the **Approval Chain** column, notice that certain buttons appear in yellow. This is because there are that many individuals assigned to the approval chain. You can see who is the approver on file by hovering your mouse pointer over the button.

The button turns green once an approver has reviewed the invoice. A red button indicates that the invoice has been rejected.

1.3.3.1.1 Invoice Detail Page

You can view the detail page for an outstanding, approved, or rejected invoice by clicking the invoice number.



Invoice Detail Page

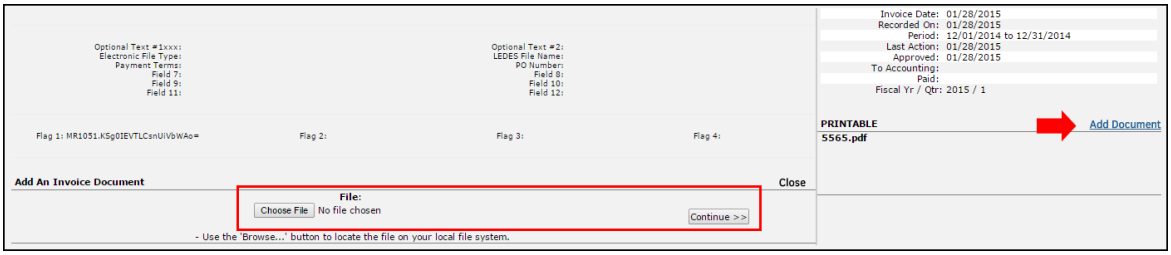
The **Invoice Detail** page includes (but is not limited to) invoice date and total monetary amount information, a hyperlink to view the matter against which the invoice has been submitted, and the approval chain. On a Detailed invoice, the screen also includes fee and disbursement totals, a breakdown of line items, and options for viewing the line item details.

Add a Document

To add an invoice-related document to the record, click **Add Document** on the right side under the key dates section.

A new section appears under the invoice file information. Click **Choose File** to select a document from your file explorer, then click **Open** and **Continue>>>**. The newly added document appears in your **Printable** list.

Click on the name of a document to view it or download it to your computer.

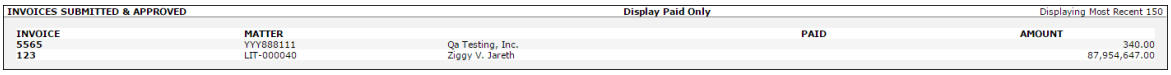


Add a Document

1.3.3.2 Approved Invoices

The **Approved Invoices** hyperlink in the **Finance** section of the **Main Page** sidebar displays the 150 most recently approved invoices.

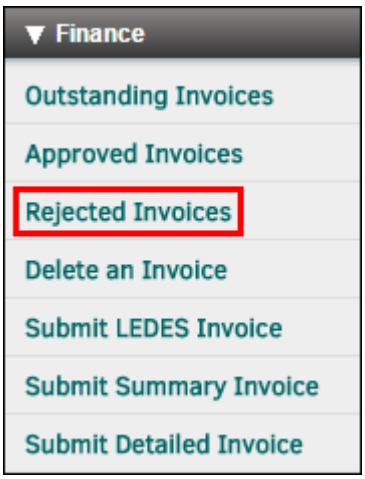
Click on the invoice number to be taken to the invoice detail page.



Approved Invoices List

1.3.3.3 Rejected Invoices

To view rejected invoices, the approval chain and key dates, select **Rejected Invoices** from the **Finance** section of the **Main Page Navigation** sidebar.

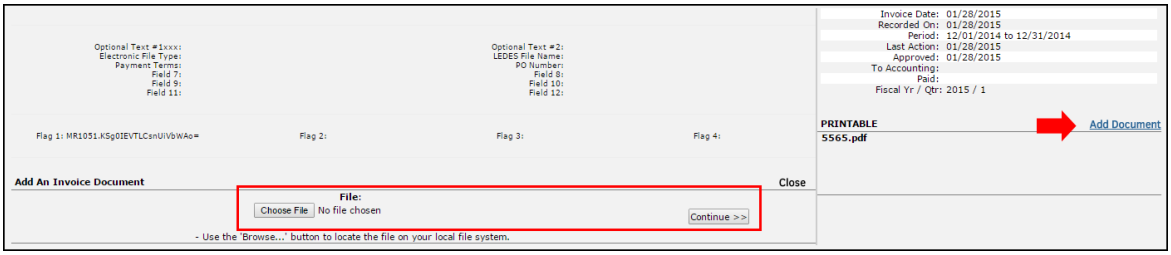


Finance: Rejected Invoices

Click on the invoice number to see the invoice's detail page. The rejection status is displayed in a yellow bar at the top of the invoice page.

Invoice documents can still be added to rejected invoices. To add an invoice-related document to the record, click **Add Document** on the right side under the key dates section.

A new section appears under the invoice file information. Click **Choose File** to select a document from your file explorer, then click **Open** and **Continue>>>**. The newly added document appears in your **Printable** list.



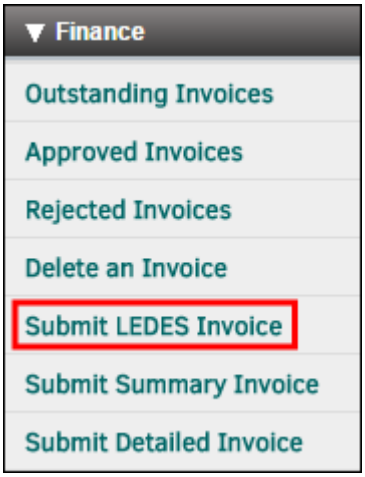
Add a Document

1.3.3.4 Submit LEDES Invoice

LEDES Codes are industry standard accounting codes for legal billing which allow various accounting programs to interface with each other.

In Lawtrac, Industry Standard Codes are listed first with their code number, description and type (Activity, Disbursement, Fee, etc.).

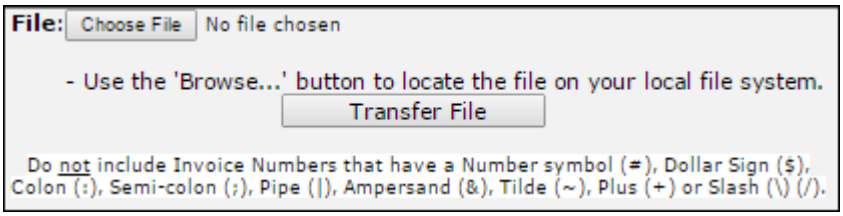
To submit a LEDES-compliant invoice, select **Submit LEDES Invoice** from the **Finance** section of the **Main Page Navigation** sidebar.



Finance: Submit LEDES Invoice

Click **Review Rules** in the yellow Rules box to view in-house legal department preferences to ensure that the invoice reflects fiscal year settings.

Select **Choose File** to open your file browser and select a document. Click **Open**, then select **Transfer File**.



Upload LEDES Invoice

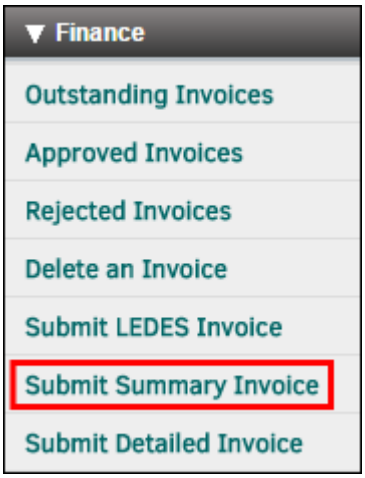
Note: *Upload WILL fail because of one or more of the reasons below:*

- Hard returns after the double brackets [ ]
- Extra space(s) after the double brackets [ ]
- Matter number not in the CLIENT_MATTER_ID field
- Brackets [ ] in the description field
- LEDES task code(s) missing
- Incorrect LEDES task code(s)
- Missing one or more of the 24 required fields
- Date format is incorrect (must be YYYYMMDD)

1.3.3.5 Submit Summary Invoice

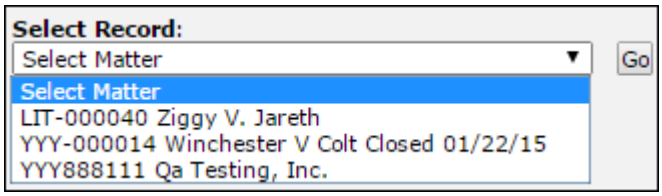
Summary invoices differ from Detailed invoices because summary invoices record "bottom line" amounts.

To submit a summary invoice, select **Submit Summary Invoice** from the **Finance** section of the **Main Page Navigation** sidebar.



Finance: Submit Summary Invoice

1. Select a matter record from the drop-down list, then click **Go**.



Select a Matter Record

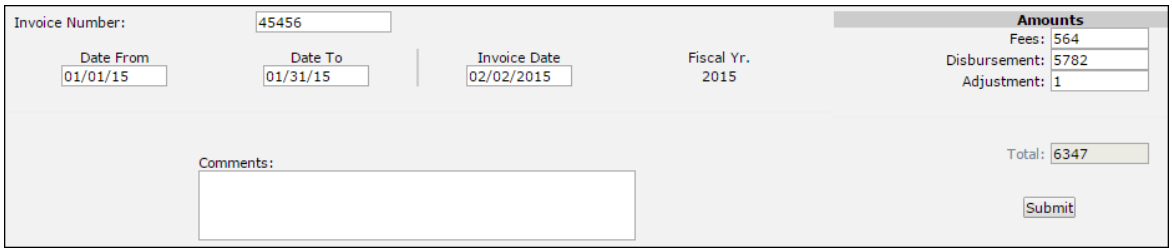
2. Enter an invoice number. This number can be any combination of letters, numbers, and dashes, up to 35 characters. It is very important to make sure the invoice number is unique to avoid different invoices with the same identification code.

Key dates are pre-populated, but the date fields can be edited by typing into the boxes.

3. Enter fee, disbursement, and adjustment amounts, and add any necessary commentary.

   If you need to start over from step one, click **Reset/Start Over** at the top right section of the page.

4. Click **Submit**.

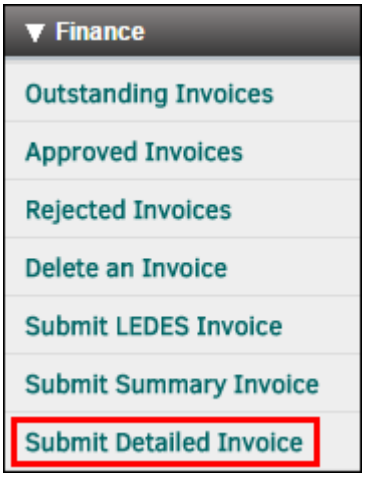


Submit the Invoice

1.3.3.6 Submit Detailed Invoice

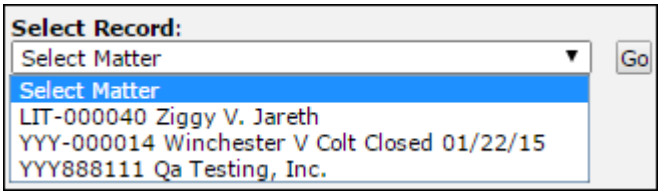
Unlike a Summary invoice, a Detailed invoice allows you to add separate line items by LEDES codes.

To submit a detailed invoice, select **Submit Detailed Invoice** from the **Finance** section of the **Main Page Navigation** sidebar.



Finance: Submit Detailed Invoice

1. Select a matter record from the drop-down list, then click **Go**.

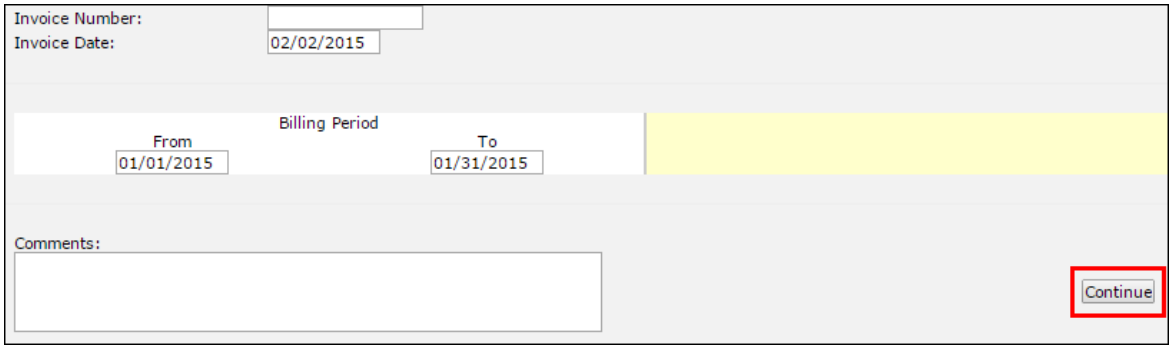


Select a Matter Record

2. Enter an invoice number. It is very important to make sure the invoice number is unique to avoid different invoices with the same identification code.

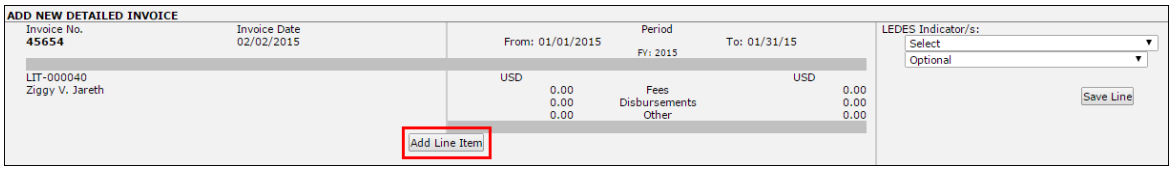
   Key dates are pre-populated, but the date fields can be edited by typing into the boxes.

   Click **Continue**.



Create an Invoice Number

3. In the next screen, click **Add Line Item**. The LEDES Indicator drop-down lists show up to the right.



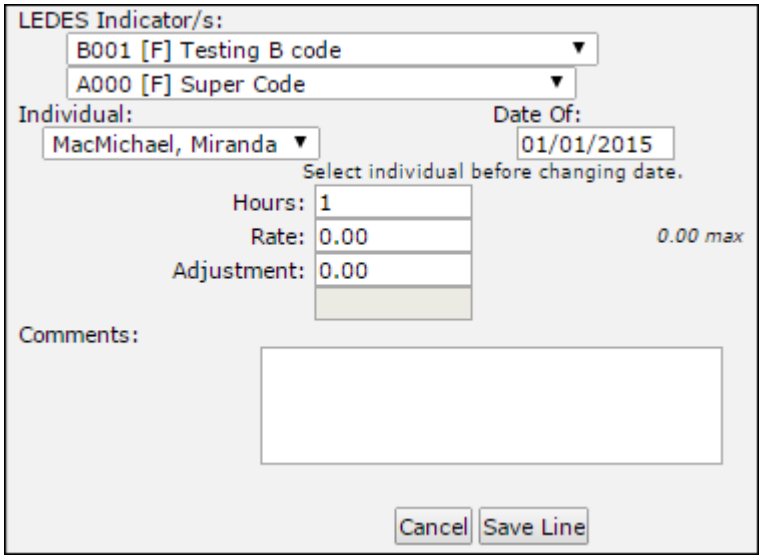
Add a Line Item

4. Select a LEDES code from the drop-down list, then the sub-topic, if applicable. Select the individual who performed the work from the drop-down list, and change the task date if necessary.

   Note: *Some LEDES codes may be blocked to outside counsel use. If this is the case, you may not be able to make any selections from the* Individual *drop-down menu, and you cannot save the line. Contact your site administrator to have them change permission settings for LEDES codes.*

   Enter the hours worked and the pay rate, or any adjustment, into the corresponding text boxes. Do *not* use the "$" or any other currency symbol or commas.

   If you are unsure of the rate for a certain activity, you can refer to the Rate Card Review page.



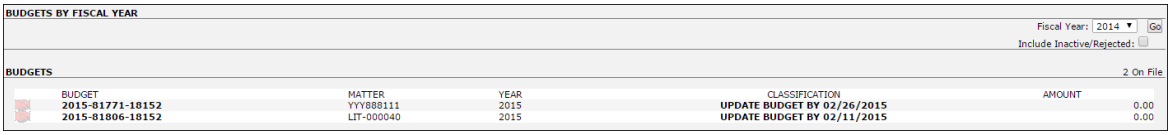
LEDES Indicators

Negative amounts are not accepted in the Rate field. If you need to create a Credit invoice, enter a positive amount in the Rate field, then enter a negative amount in Adjustment. (For example, if you want a $200 Credit invoice, enter 1 in Hours, 1 in Rate, and -201 in Adjustment.)

5. Click **Save Line**. You can now edit a line item by clicking the icon, or delete it by clicking the icon.

1.3.4 Budgets

The **Budgets** hyperlink in the **Main Page Navigation** sidebar, located in the **Finance** section, allows you to view a list of all budgets, and approve or reject a budget to which you have been assigned as approver.



Budgets

View budget detail by clicking the budget number.

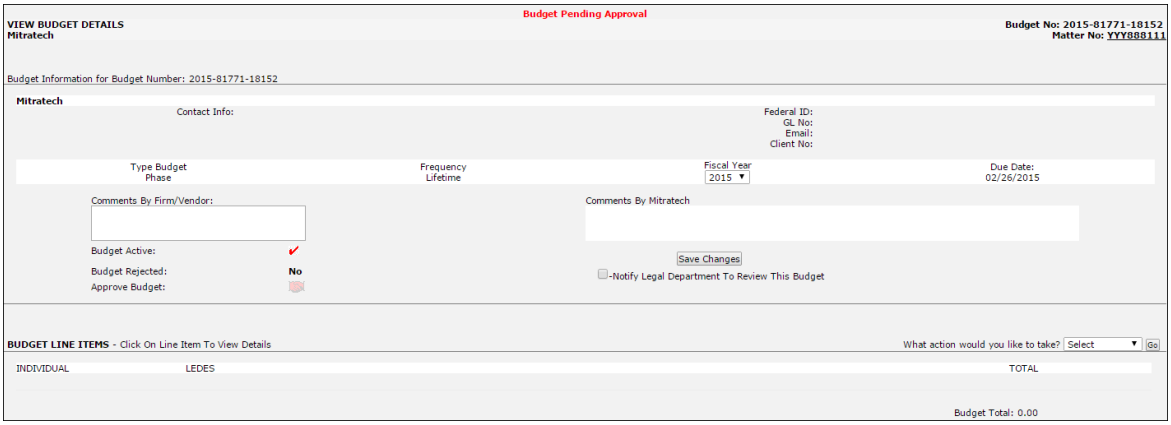
Budgets for the current fiscal year are the default view. To change the fiscal year, select an option from the Fiscal Year drop-down list at the top right side of the page and click **Go**. Use the checkbox to include inactive or rejected budgets.

1.3.4.1 Budget Detail Page

The budget's detail page shows contact information for the submitting party, the type of frequency for the budget, due date, and any comments made by the firm/vendor or staff.

Identify the budget as rejected, approved, or pending approval by the notice at the top of the page.

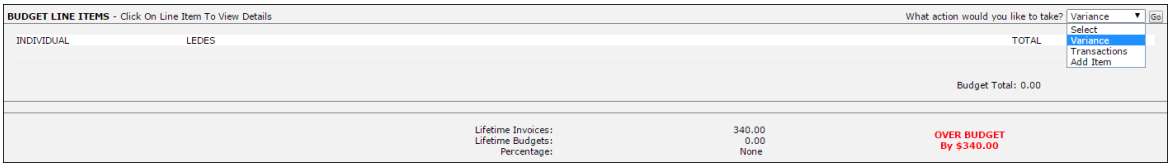
Click on matter number (at the top right side of the page) to view the matter record associated with the budget.



Budget Detail

Send a notification to the legal team to request them to review the budget by clicking the checkbox under the Comments By [Your Party] field. Click **Save Changes** to confirm.

Budget line items are displayed at the bottom of the page. Make a selection from the drop-down list to the far right to also view Variance or Transactions (a list of activity for the budget). Click **Go** to load the list.

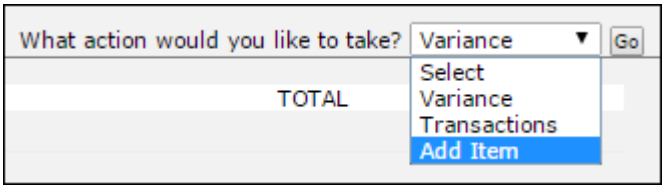


View Budget Line Items, Variance, and Transactions

1.3.4.1.1 Add a Line Item

To add a line item to a budget, select a budget from the **Budgets** page.

At the bottom of the budget page, select **Add Item** from the drop-down list and click **Go**.

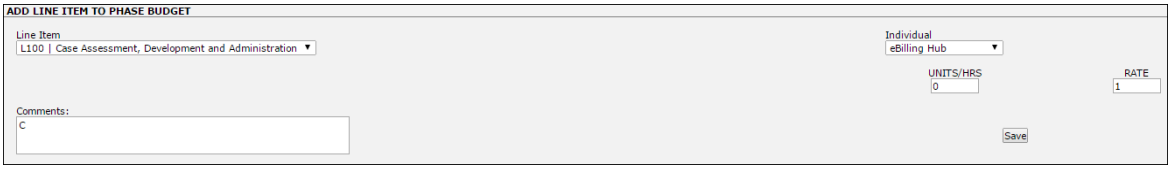


Add Item

The line item information appears below the **Budget Line Items** section.

Select a LEDES code from the Line Item drop-down list, then select an individual to whom the activity is associated.

Enter units or hours worked and pay rate into the text boxes, then click **Save**.



Add Line Item Details and Save

The new line item appears in the **Budget Line Items** section, where you can edit or delete line items by clicking the icon.

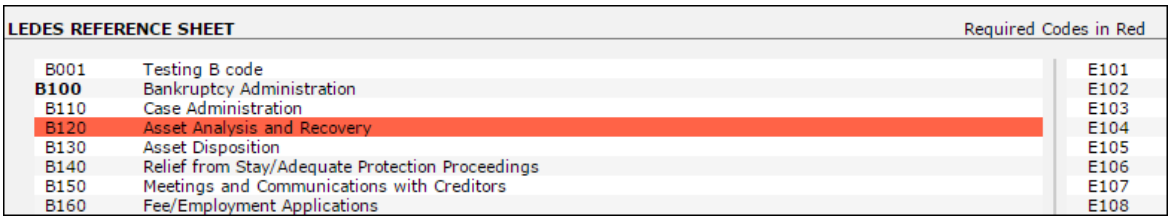
1.3.5 LEDES

The **LEDES** hyperlinks in the **Main Page Navigation** sidebar, located in the **Finance** section, allow you to view a LEDES code reference sheet and the processing and review rules set up by your site administrator.

LEDES Links

LEDES Codes

Select **LEDES Codes** to view a list of all LEDES code numbers and their purpose.



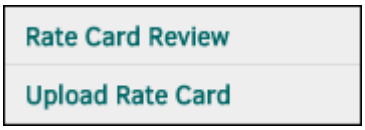
LEDES Codes

LEDES Rules

Select **LEDES Rules** to view the LEDES processing and review rules.

1.3.6 Rate Card

The **Rate Card** hyperlinks in the **Main Page Navigation** sidebar, located in the **Finance** section, allow you review existing rate cards or upload a new one.



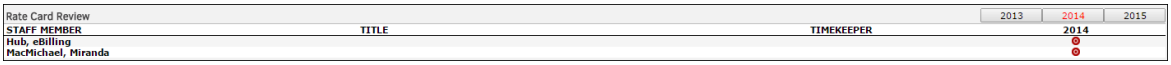
Rate Card Links

Rate Card Review

The **Rate Card Review** page displays a list of staff members by their title and timekeeper codes.

Click on the fiscal year buttons at the top right of the page to view rate cards for different years.

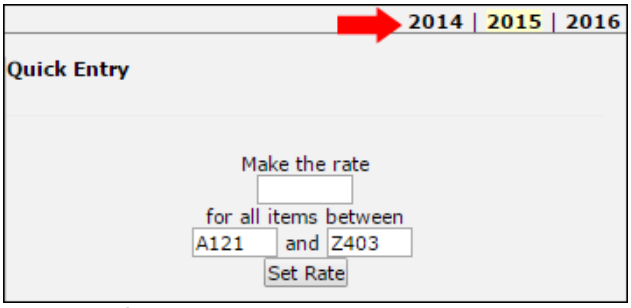
The colored icon located under the fiscal year column indicates whether the individual's rate card is approved and active (🟢) or not approved or does not exist (🔴). Click on these icons to view, edit, or add to the rate card.



Rate Card Review

When editing a rate card, you can either adjust the rates one-by-one, or use the **Quick Entry** tool on the right to set a rate for multiple codes. Enter the desired rate in the top text box, and confirm that the correct items are being adjusted in the second and third text boxes. Click **Set Rate**.

You can also switch between fiscal year views by using the year hyperlinks at the top right side of the page above the **Quick Entry** tool.



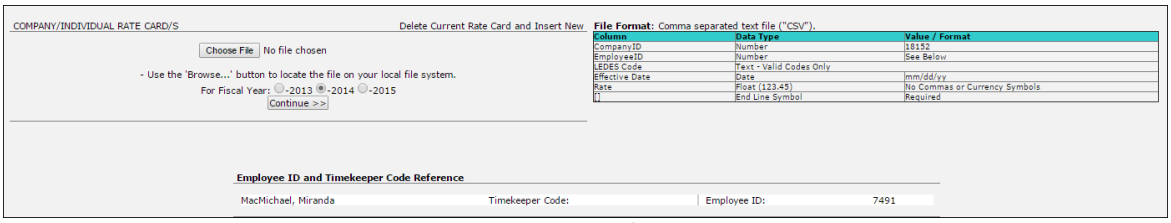
Quick Entry Tool and Fiscal Year List

Upload Rate Card

The **Upload Rate Card** page allows you to upload a company rate card from your computer. All files must match the format requirements listed in the table on the right side of the page.

Click **Choose File** to open your file browser, then select a document or file and click **Open**.

Use the radio buttons to determine the rate card's fiscal year, then click **Continue>>>**. If the document fits the file format requirements and successfully uploads, the data is displayed at the bottom.

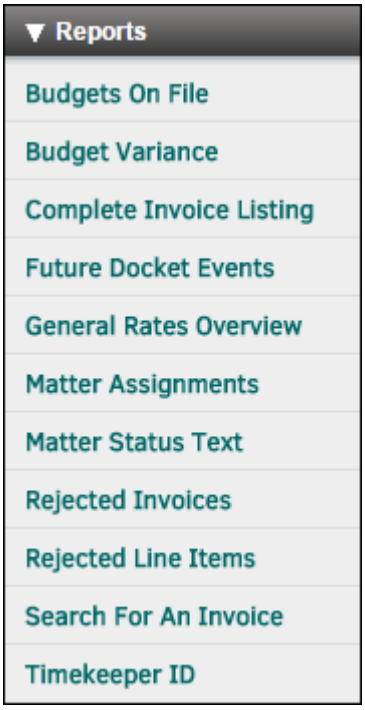


Upload Rate Card

1.3.7 Reports

Lawtrac's **Reports** module is home to a myriad of reports that can be produced by accessing the information contained in your database. This information can be tracked and compiled into specialized reports which can then be utilized to enhance your matter management.

Important Note: *Site Administrators may turn off a user's permissions to view reports.*



Lawtrac Menu: Reports

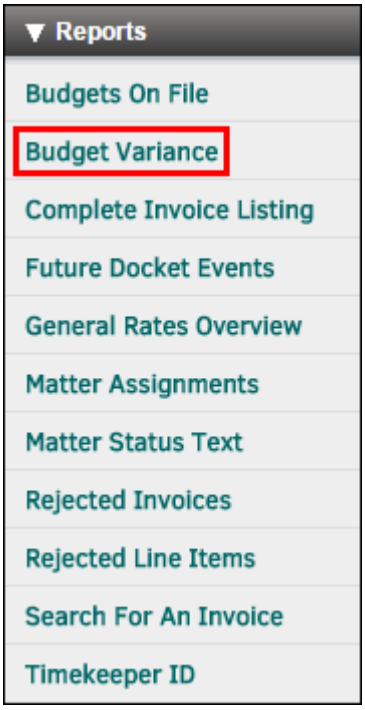
Reports Options:

Page	Function
Budgets on File	View a list of all budgets on file.
Budget Variance	View a LEDES budget variance report based on budget status.
Complete Invoice Listing	View a list of all invoices, record date, associated matter, and total amount.
Future Docket Events	View upcoming matter events.
General Rates Overview	View a list of rate card information for individuals of a firm or company.
Matter Assignments	View matter assignment data.
Matter Status Text	View any comments made about the status of a matter.
Rejected Invoices	View invoices that have been rejected during a specific time period.
Rejected Line Items	View line items that have been rejected during a specific invoice date, and/or rejection reason.

Page	Function
Search for an Invoice	Use the search tool to find a particular invoice.
Timekeeper ID	View a list of timekeepers, their title, expertise, record number, and timekeeper ID.

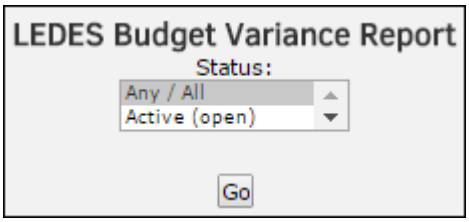
1.3.7.1 Budget Variance

The **Budget Variance** hyperlink offers you a view of Invoice-to-Budget variance by LEDES code.



Reports: Budget Variance

Select the budget status from the drop-down menu to see all related budget reports and click **Go**.



Budget variance is listed by matter number, firm name, LEDES code, Invoice Amount, Budget Amount, and total Variance.

The total amount for all matter budgets is listed at the bottom of the page.

The status drop-down menu remains visible at the top of the page, allowing you to select the next report without having to use the "**Back**" button on your browser.

LEDES Budget Variance Report

Status:

Any / All

Active (open)

This report does not contain any Summary invoices and totals may not be the actual matter spend amount.

Go

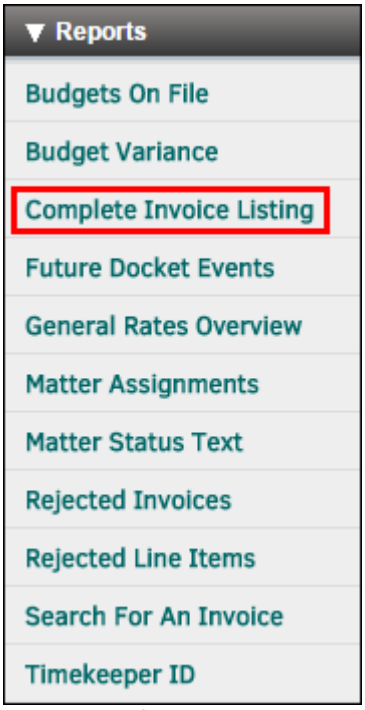
3 Records on 02/03/2015

MATTER NUMBER	FIRM NAME	LEDES CODE	INVOICE AMOUNT	BUDGET AMOUNT	VARIANCE
LIT-000040: Ziggy V. Jareth					
	Mitratech				
		B120	62,750.00	0.00	-62,750.00
	Mitratech Records: 1 TOTALS:		62,750.00	0.00	-62,750.00
LIT-000040 Records: 1 TOTALS:			62,750.00	0.00	-62,750.00
YYY888111: Qa Testing, Inc.					
	Mitratech				
		B120	340.00	0.00	-340.00
		L100	0.00	2.00	2.00
	Mitratech Records: 2 TOTALS:		340.00	2.00	-338.00
YYY888111 Records: 2 TOTALS:			340.00	2.00	-338.00
		Page TOTALS:			
MATTER NUMBER	FIRM NAME	LEDES CODE	INVOICE AMOUNT	BUDGET AMOUNT	VARIANCE
			63,090.00	2.00	-63,088.00

Budget Variance Report

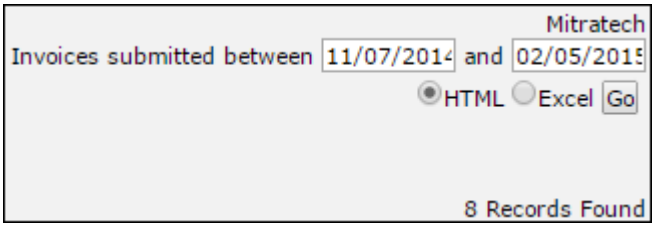
1.3.7.2 Complete Invoice Listing

The **Complete Invoice Listing** link in the **Reports** section of the **Main Page Navigation** sidebar displays all invoices for all matter records by invoice number, date recorded, approved, sent to accounting, date paid, and the sum of all total amounts.



Reports: Complete Invoice Listing

Search for invoices submitted between specific dates by using the search engine in the top right corner of the page. Using the radio buttons to set the display format exports the report in different ways. Selecting HTML displays the list on the Web page, whereas selecting Excel uploads the report to your computer (you may need to check your download bar).



Invoice Search Options

View an invoice's associated matter number, separate fees, distribution, or other payments by clicking the expand ⊞ icon.

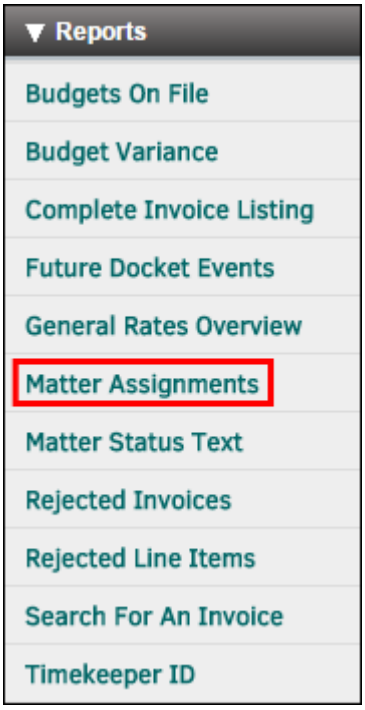
Click the invoice number to navigate to the invoice detail page.

	INVOICE	RECORDED	INV DATE	APPROVED	TO ACCT	PAID	AMT
⊟	**R446**	02/03/2015	02/03/2015				1.00
	MATTER			FEES	DISB.	OTHER	TOTAL
	LIT-000040			1.00	0.00	0.00	1.00
⊞	**R44**	02/03/2015	02/03/2015				0.00
⊞	**R-4464**	02/03/2015	02/03/2015				0.00
⊞	**45654**	02/02/2015	02/02/2015				0.00
⊞	**7897**	02/02/2015	02/02/2015				62,750.00
⊞	**7898**	02/02/2015	02/02/2015				0.00
⊞	**5565**	01/28/2015	01/28/2015	01/28/2015			340.00
⊞	**123**	01/05/2015	01/05/2015	01/08/2015	01/08/2015		87,954,647.00
						Total:	88,017,738.00

Complete Invoice Listing

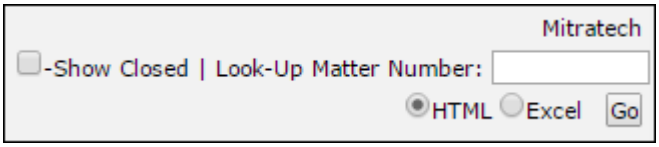
1.3.7.3 Matter Assignments

The **Matter Assignments** link in the **Reports** section of the **Main Page Navigation** sidebar displays the assignment date and lead data for all open or closed matter records.



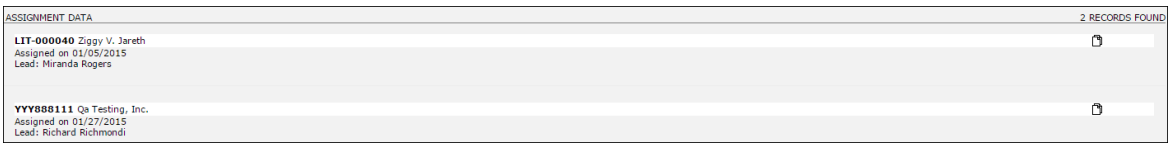
Reports: Matter Assignments

Search for matter submitted between specific dates by using the search engine in the top right corner of the page. Using the radio buttons to set the display format exports the report in different ways. Selecting HTML displays the list on the Web page, whereas selecting Excel uploads the report to your computer (you may need to check your download bar).



Matter Search Options

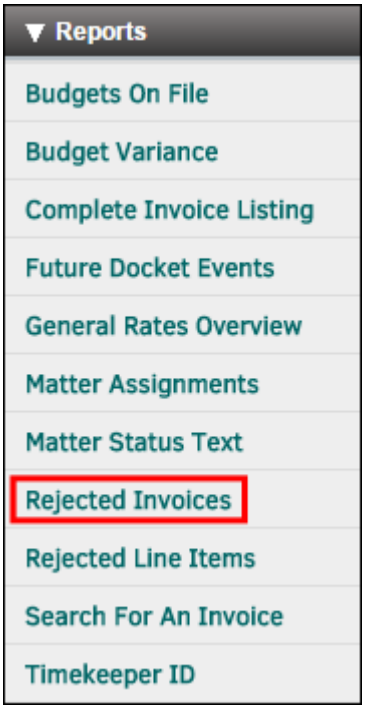
View the matter record detail page by clicking the icon to the far right of the assignment data.



Matter Assignment Data

1.3.7.4 Rejected Invoices

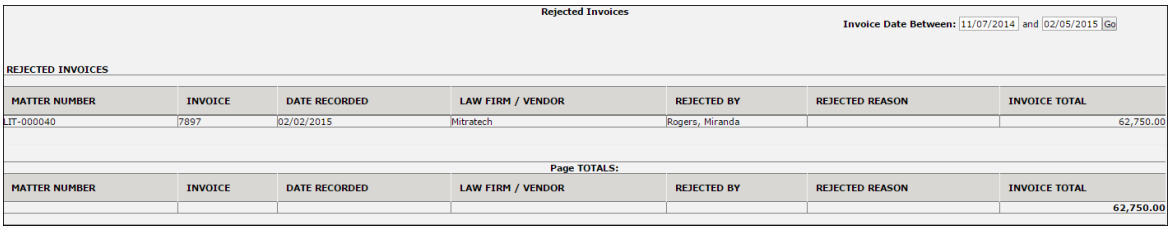
The **Rejected Invoices** link in the **Reports** section of the **Main Page Navigation** sidebar displays the invoice, matter, and rejection data for all open or rejected invoices.



Reports: Rejected Invoices

You first need to use the date boxes at the top right side of the page to search for invoices between a specific date. Click **Go** to display the results.

The report lists each invoice by matter number and the page totals at the bottom.



Rejected Invoices

Invoice Date Between: 11/07/2014 and 02/05/2015 Go

REJECTED INVOICES

MATTER NUMBER	INVOICE	DATE RECORDED	LAW FIRM / VENDOR	REJECTED BY	REJECTED REASON	INVOICE TOTAL
LIT-000040	7897	02/02/2015	Mitratech	Rogers, Miranda		62,750.00

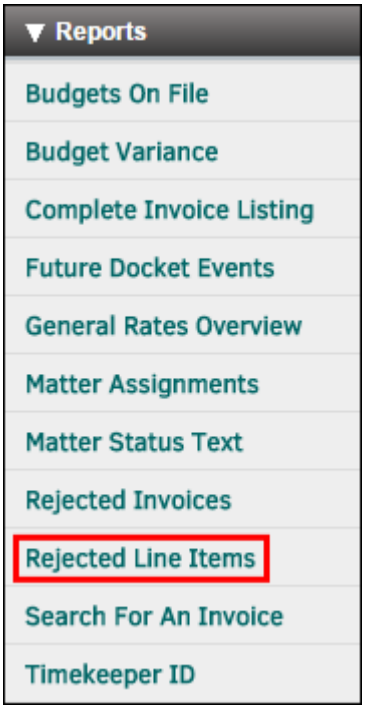
Page TOTALS:

MATTER NUMBER	INVOICE	DATE RECORDED	LAW FIRM / VENDOR	REJECTED BY	REJECTED REASON	INVOICE TOTAL
						62,750.00

Rejected Invoices Report

1.3.7.5 Rejected Line Items

The **Rejected Line Items** link in the **Reports** section of the **Main Page Navigation** sidebar displays the invoice, matter, and rejection data for all open or rejected line items.

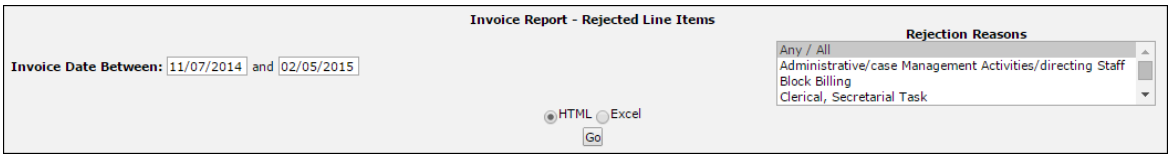


Reports: Rejected Line Items

You first need to use the date boxes at the top right side of the page to search for invoices between a specific date. You can also narrow your search results by rejection reasons. Hold the **CTRL** button down on your keyboard to select multiple options.

Using the radio buttons to set the display format exports the report in different ways. Selecting HTML displays the list on the Web page, whereas selecting Excel uploads the report to your computer (you may need to check your download bar).

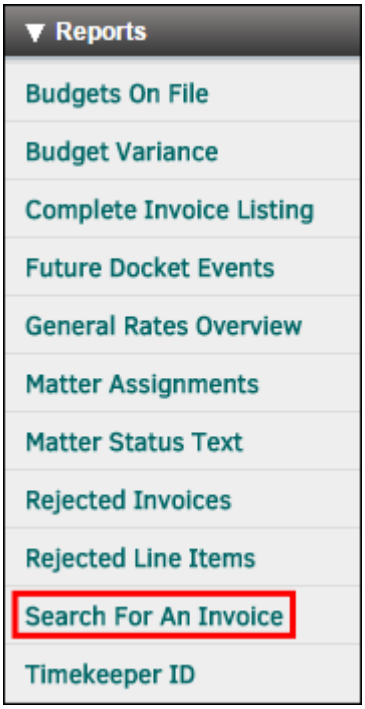
Click **Go** to display the results.



Rejected Line Items Report

1.3.7.6 Search for an Invoice

The **Search for an Invoice** link in the **Reports** section of the **Main Page Navigation** sidebar allows you to search for a specific invoice by number.



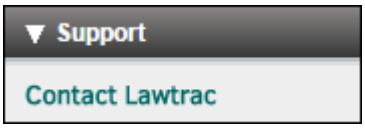
Reports: Search for an Invoice

Type as many characters for the invoice number as applicable in the search tool box. Specify whether the number or group of numbers is the beginning, end, or middle part of the invoice number, then click **Go**.

When the search results display, click on the invoice number listed to navigate to that invoice's detail page.

1.3.8 Support

The **Support** module provides a link to valuable contacts.



Support Links

To send Customer Service a request, click the **Contact Lawtrac** hyperlink under the **Support** button.

Type your message into the text box, then click **Send Message**.

1.4 Top Navigation Bar

The **Top Navigation Bar** is a series of mouse-over tabs with drop-down hyperlinks that take you to many key areas of the site. The top menu bar can be seen from any screen in the application.

Your firm name is located between **Quick Find** and **Log Out**.

Top Navigation Bar

The **Home** tab on the **Top Navigation Bar** includes links to not only the Home Screen, but also the last matter, last invoice, and last budget you viewed. To quickly get back to the last matter, invoice, and budget you were working on or viewing, use these links instead of your "**Back**" browser button.

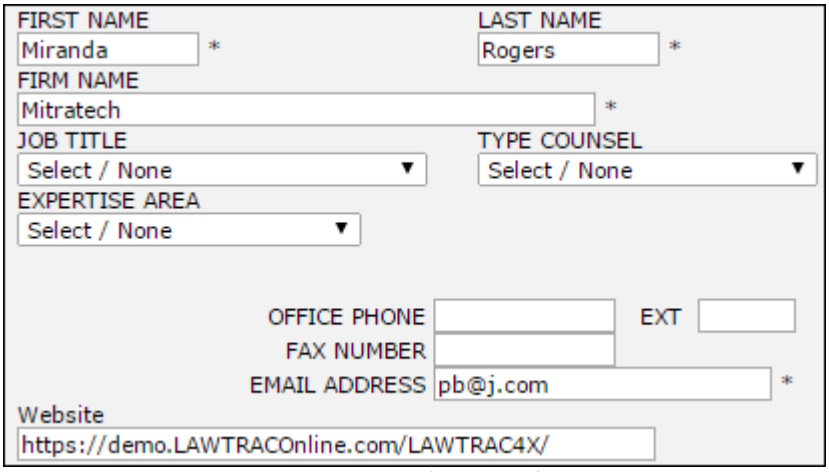
1.4.1 My Lawtrac

The **My Lawtrac** tab in the **Top Navigation Bar** is a key tool for using Lawtrac and enables you to customize the program to your specific needs.

Top Navigation: My Lawtrac

The **My Lawtrac** page is very important in regards to how the application works for you. It includes options that impact matter listings, searches, and the format of some areas. Settings in **My Lawtrac** only affect your personal log-in. ***Note:*** *Because of these customization options, what you see when you view a matter may be different than what your colleague sees.*

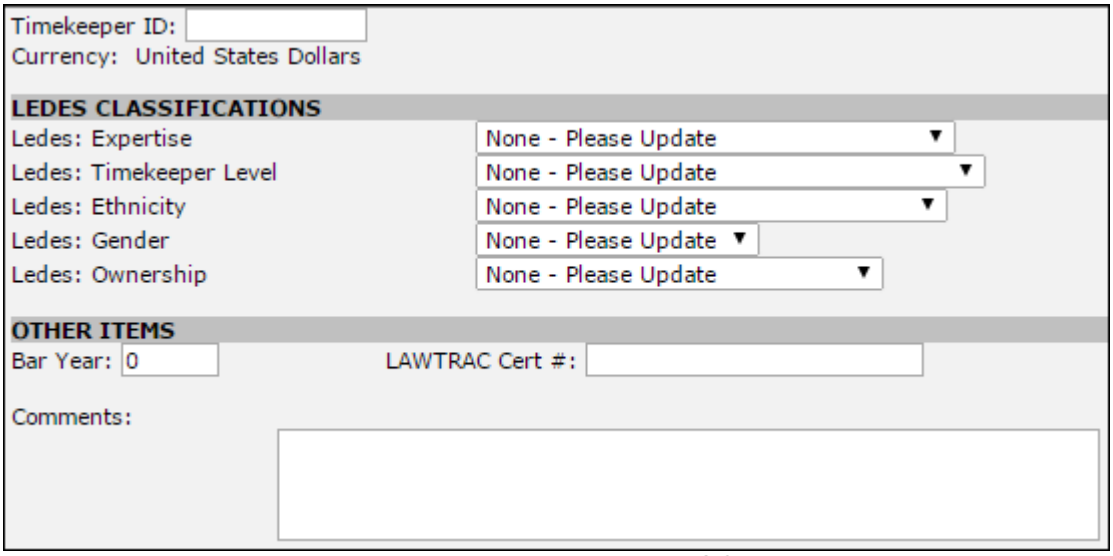
Note to Site Administrators: *It is important to walk your co-workers through the process of setting up their* ***My Lawtrac*** *if they haven't already done so. You may want to set guidelines for the options users select. Check a user's* ***Quick Find*** *settings in their* ***My Lawtrac*** *if* ***Quick Find*** *is not locating their records as expected.*



My Lawtrac: Title and Contact Information

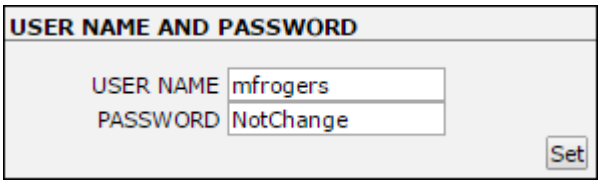
The area depicted above is the information that appears on the top left side of the **My Lawtrac** page. The information can be edited by typing directly into the text boxes or by making a selection from the drop-down menu. ***Important Note:*** *Each section of* ***My Lawtrac*** *has its own* ***Save*** *button, so after making changes to each section, be sure to click* ***Save****.*

It is important to include your phone number and email address as these are used to auto-populate certain areas within Lawtrac and are included in any error messages automatically sent to Customer Service.



My Lawtrac: Timekeeper and LEDES Codes

Your Site Generator customizes LEDES classifications for your records that appear in these drop-down menus.

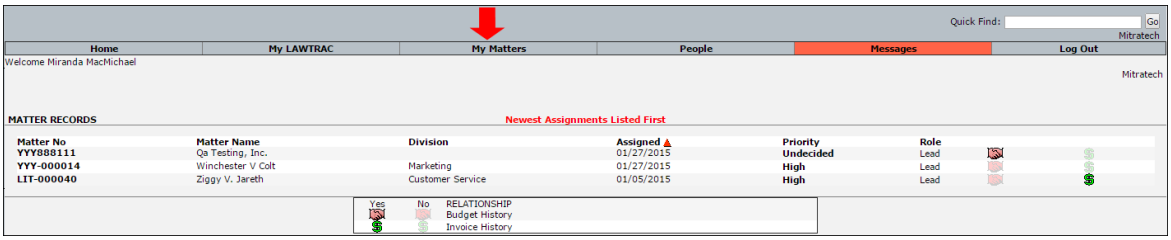


You can change your user name and password here. You are required to update your password every 365 days. You may not repeat the current password or the last 11 passwords used. Your new password must be at least five (5) characters in length.

Refer to your site administrator for additional password security rules.

1.4.2 My Matters Module

The **My Matter** tab in the **Top Navigation Bar** is where you'll find all the information you may need pertaining to your assigned matters.



Top Navigation: My Matters

Click on matter number to open a matter record.

Filter the list by clicking the **Matter No**, **Matter Name**, **Assigned**, or **Role** column header.

Click on the icon to view budget detail.

Click the icon to view invoice detail.

1.4.2.1 Matter Record Main Page

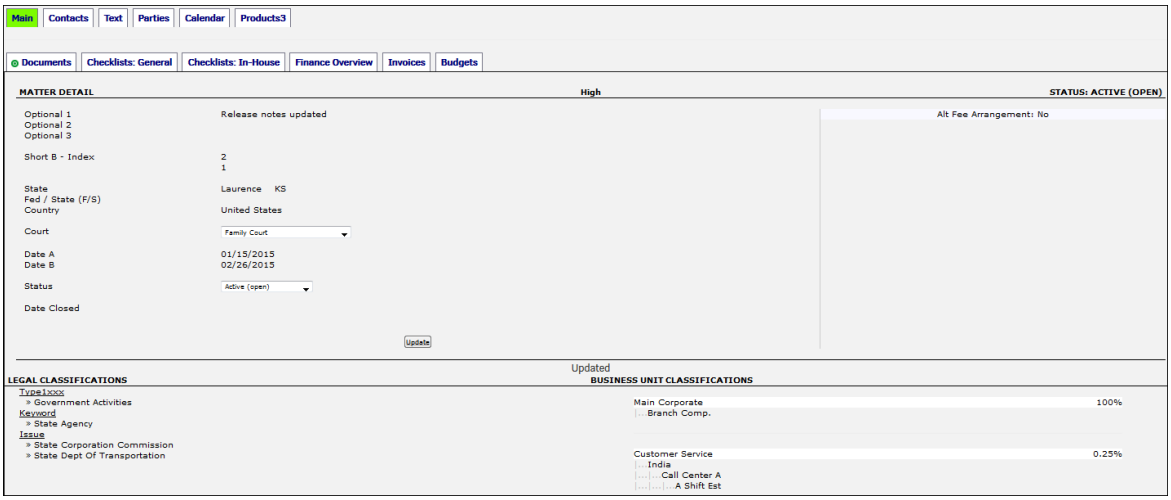
From within a matter record, you can see the following tabs at the top of the page. Click on each tab to navigate through the matter record.

The tabs on the **Matter General Report** page allow screens to load faster and give you the ability to toggle through the criteria most important to you. Your database also remembers the last tab you selected and default to it the next time you return to this screen by hitting the "**Back**" button on your browser.

Open Matter Tabs

Main

From the **Main** tab at the top of the open matter detail page, you can adjust information about the incident that the matter record addresses, view legal and business unit classifications, and view the alternate fee arrangement, if one exists.



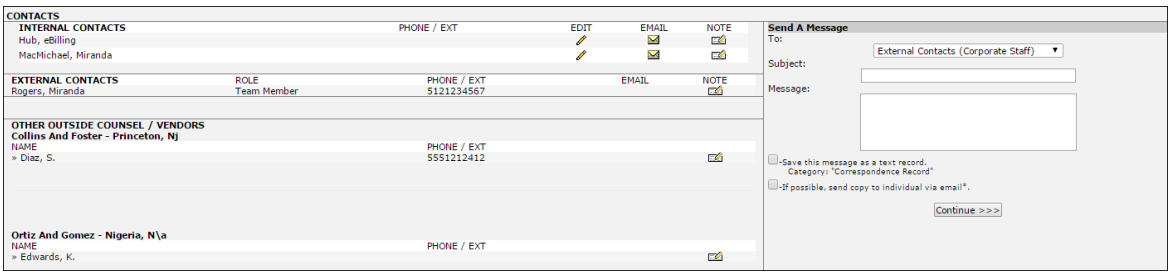
Main Tab

Matter Detail

- Change incident location, area, and geographical location by typing directly into the text boxes or selecting an option from the drop-down menus.
- Click the icon to select a date for Date of Incident and Date Reported.
- Click **Update** to save changes.

Contacts

From the **Contacts** tab at the top of the open matter detail page, you can view internal and external contacts, other outside counsel/vendor contact information, and send a message to corporate staff or staff and vendors.



Contacts Tab

Internal Contacts

- The icon allows you to view the contact's job title, timekeeper ID, area of expertise, and any comments attached to their profile. You can also release this individual from the matter record by typing "yes" into the text box at the bottom of the page and clicking **Release From Matter**.

  Enter "Yes" To Continue: [ ] Release From Matter

- The icon allows you to send an internal message to the individual. In the new pop-up window, type in the subject of the note in the Subject box, and enter your message in the Message box. Click **Send Message** when finished.

External Contacts

Your external contacts are the individuals that are members of the legal team associated to the matter record. Send an internal note using the icon.

Other Outside Counsel/Vendors

These contacts are individuals belonging to any other firm or vendor associated with the matter record. Send an internal note using the icon.

Send a Message

You can send a message to all external contacts (corporate staff) or all individuals on your **Contacts** page (corporate staff and firms/vendors).

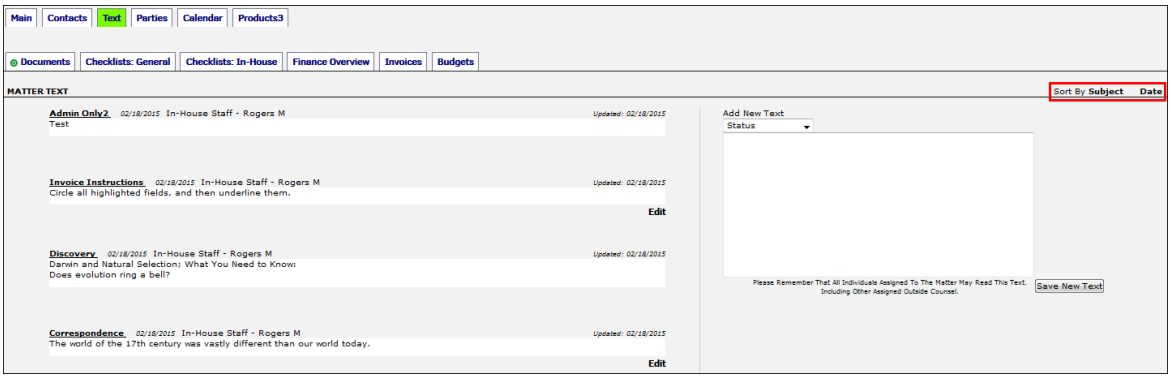
- Type a message title into the Subject text box and your message in the Message box.
- Use the checkboxes to save the message as a text record or receive a copy of the message via email.
- Click **Continue>>>** to send the message.

Text

From the **Text** tab at the top of the open matter detail page, you can add text about the matter record status, outcome notes, case summary, etc. The Lawtrac site administrator manages the subjects of the texts that can be selected from the drop-down menu.

Click **Save New Text** to add the new text to your matter text list on the left side.

- Click **Author** under the matter text to edit the text record or delete the text record.
- Click either **Subject** or **Date** on the top right corner to sort the matter text list accordingly.



Text Tab

Parties

From the **Parties** tab at the top of the open matter detail page, you can view all parties or entities associated with the matter, the date they were added, and their category.

To add a party or entity to the matter record, please refer to the Add a Party/Entity section.

Calendar

From the **Calendar** tab at the top of the open matter detail page, you can view future matter events and add new events by type of event, event date, time, and detail.

Calendar Tab

- The icon allows you to edit the event.
- The icon deletes the event.
- The icon allows you to identify an internal staff member as responsible for the calendar event.

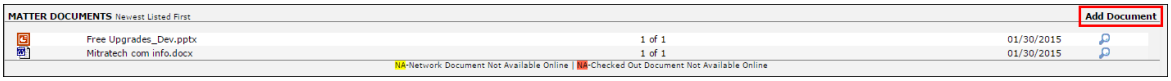
Product

From the **Product** tab at the top of the open matter detail page, you can view and edit the matter product.

Documents

From the **Documents** tab at the top of the open matter detail page, you can view and add documents that are associated with the matter.

A marker in the **Documents** tab indicates that there are documents currently available for viewing.

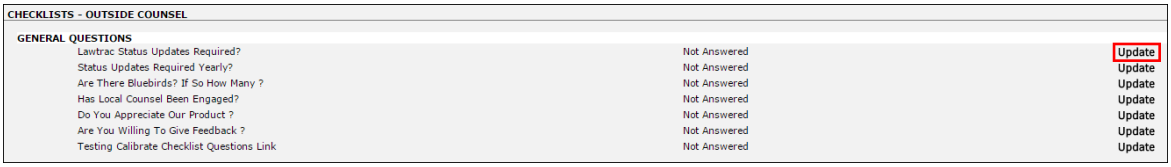


Add Document Link

Checklists: General

From the **Checklists: General** tab at the top of the open matter detail page, you can view and update general questions that are directed to outside counsel.

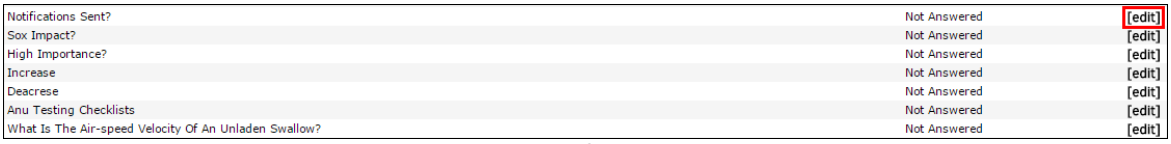
If the matter record contains any legal classification-specific questions, those appear here as well.



Update a General Question Link

Checklists: In-House

From the **Checklists: In-House** tab at the top of the open matter detail page, you can view and edit questions that are directed to the Legal Team.



Edit In-House Checklist Link

Finance Overview

From the **Finance Overview** tab at the top of the open matter detail page, you can view financial consideration by adversary and by company.

Finance Overview | Invoices

	By Adversary	By Company
Finance A:	2560.00	0.00
Finance B:	0.00	4500.00
Finance C:	0.00	0.00
Finance D:	0.00	0.00
Finance E:	0.00	0.00
Finance F:	0.00	0.00
Sum:	2,560.00	4,500.00
Average:	426.67	750.00

Finance Overview Tab

Invoices

From the **Invoices** tab at the top of the open matter detail page, you can view invoices by date added and the total of all fees and other expenses.

Click on the Invoice number to open the invoice detail page.

INVOICES

DATE	INVOICE	FEES	DISB	OTHER	TOTAL
01/28/2015	**5565**	340.00	0.00	0.00	340.00
				Total Invoices:	340.00

Invoices Tab

Budgets

If the matter record does not have a budget on file, this tab may not appear.

From the **Budgets** tab at the top of the open matter detail page, you can view budgets by date added, the type of fee, and the frequency of the budget.

Click on the budget number to open the budget detail page.

BUDGETS

DATE	BUDGET	TYPE	FREQUENCY	FY	TOTAL
01/28/2015	**2015-81806-18152**	Phase	Lifetime	2015	0.00

Budgets Tab

Routing Slips

If the matter record does not have a routing slip on file, this tab may not appear.

The **Routing Slips** tab takes you to a list of all your active routing slips, with hyperlinks to the associated matter or document. The Type of routing slip (Matter or Document) is indicated along with a Due By date and Reviewed status (Yes/No).

1.4.3 People Module

Selecting **People** from the **Top Navigation Bar** takes you to a roster of your staff in outside counsel.

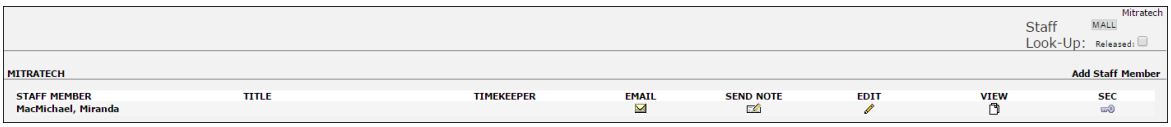
Lawtrac — Quick Find: Go — Mitratech

Home | My LAWTRAC | My Matters | People | Messages | Log Out

Top Navigation: People

At the top right corner of the page, you can use the alphabet buttons to filter your staff list by their surname initial, or click **All** to view all employees.

Click the Released checkbox to view only individuals who have been released from a matter record.



Our Staff List

Use the following icons to navigate or make changes to staff profiles:

- — Send the individual an email. The individual must have their email address populated in their personnel record. Clicking this icon launches your email application and any message is sent through those channels.
- — Send the individual an internal note (they are only able to view this note after logging in to Lawtrac).
- — Edit the individual's profile.
- — View the individual's profile. The profile page displays additional contact information, comments entered by the site administrator, and a list of open matter associations. Use this link to obtain key personnel mailing addresses and fax numbers when those fields have been populated within their personal profiles.
- — View or change an individual's permissions and security settings.

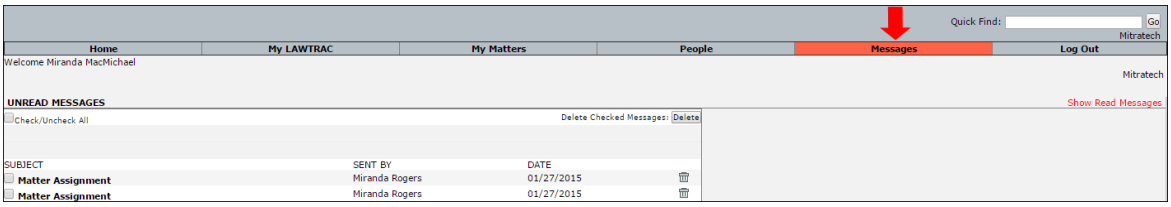
Note: *Depending on your role that the site administrator has granted, some options may not be applicable.*

To add a staff member, please refer to Add Staff Member in the Main Page Navigation Bar | People section of this user guide.

1.4.4 Messages Module

The **Messages** module is accessed via the **Top Navigation Bar**.

Clicking the **Messages** tab opens up the **Unread Messages** screen.

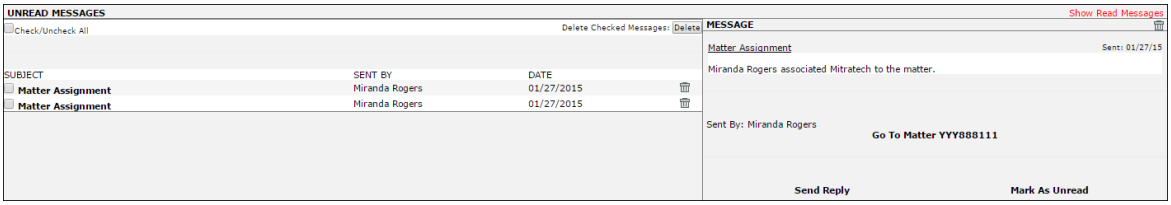


Top Navigation: Messages

Click on the message (**Subject**) hyperlink to open the message on the right side of the screen.

The message screen displays the message subject, text, matter number, and matter name.

Links are provided when applicable, enabling you to: Go to Matter, View Invoice, View Budget, View Calendar, View Routing Slip, Send Reply, Mark As Unread, and Delete Message ( ).



Open Message

To delete a single message, click the icon to the far right of the subject title. To delete multiple messages, click the checkbox next the message you want to delete or use the 'Check/Uncheck All' box located at the bottom of your list of messages. Then click Delete.

Select **Show Read Messages** in red text at the top right of the page to show only messages that have already been opened.

1.4.5 Quick Find and Log Out

Quick Find is one of several ways to locate matter records, invoices, or budgets. Often, it's the fastest way to search and you'll find this feature on all but a few screens in Lawtrac.

Quick Find Search Bar

The **Quick Find** search tool does not have a minimum character limit, however the screen load time may be increased depending on how broad in scope the search is. Type any portion of a matter name or number in the **Quick Find** box and click **Go** or press **Enter** on your keyboard. Results are displayed on your screen with a link to each matter record.

The results include both open and closed matters (closed matter numbers are noted in red).

- **Quick Find** searches in the Matter Name, Short Matter Name and Matter Number field, making no distinction as to which field it is searching in.
- Enter a unique string of characters (i.e. CON-; Jones; 012).
- The default listing is in Matter No. order, but you can click on the **Matter Name** column heading to re-sort the list by Matter Name.

Quick Find Settings are discussed in depth in My Lawtrac. These settings determine what field(s) **Quick Find** searches, whether the search includes matter you are not assigned to, and how many results are listed.

Logging Out of Lawtrac

Top Navigation: Log Out

Always exit the application by using the **Log Out** link when leaving the application, rather than simply clicking the browser's **Close** button or navigating to a new Website. Logging out best preserves the security of your site.

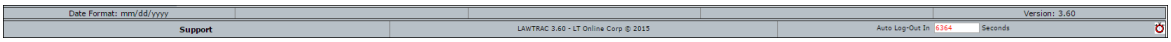
There is a **Log Out** link on the far right of the **Top Navigation Bar.**

1.5 Bottom of the Home Screen

At the bottom of the Lawtrac Home Screen you can see the current date, the software version of Lawtrac you are utilizing, and how many seconds are left on the timer before you are automatically logged out.

When navigating the Web site, the timer always resets when a new page is opened.

Click the **Support** hyperlink to fill out a customer service support notice.



Bottom of the Lawtrac Page

1.6 e-Billing User Guide for Law Firms and Vendors

- Lawtrac accepts the 1998B LEDES File Format
- LEDES Task codes are required for successful submission of an invoice. (Examples: B100 Bankruptcy-Administration, L100 Litigation-Case Assessment, Development and Administration, etc.)
- LEDES Activity codes (codes beginning with the letter “A”) are not required by Lawtrac for successful submission of an invoice; however, they may be required by your client. (Examples: A101 Activity-Plan and Prepare for, A102 Activity-Research, etc.)
- Lawtrac can read multi-matter invoices (i.e. one (1) invoice number can contain multiple matter numbers).
- Lawtrac can read a multi-invoice file (i.e. one (1) electronic file can contain more than one invoice number).

Lawtrac can have your firm e-Billing in five easy steps:

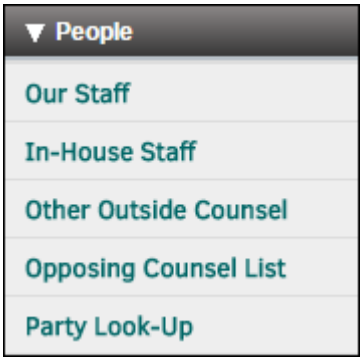
1. **Edit Administrator’s profile and set permissions.** If you are your firm’s Lawtrac Administrator, you may need to update the **Administrator’s** record with your personal information and then confirm that your proper permissions are enabled.
2. **Add staff members.** Ensure that all employees who bill for their time (attorneys, paralegals, etc.) are entered into Lawtrac’s database.
3. **Add a rate card for each staff member (a.k.a timekeeper).** This is the hourly rate charged by each timekeeper for the specific LEDES task codes they bill against.
4. **Add a company rate card.** This is filed under the Administrator and includes all expense/ disbursement LEDES codes and the proposed amounts your firm may bill your client. (It’s possible that your client may provide you with an upload file of pre-approved expense rates.)
5. **Submit an electronic invoice.** This entails submitting the LEDES compliant invoice file that has been assembled by your billing department.

1.6.1 Edit Administrator's Profile and Set Permissions

Click on the **People** tab in the **Main Page Navigation** sidebar on the left side of the page to expand the links.

The **People** tab in the **Main Page Navigation** sidebar is a great resource for getting Legal Staff member information quickly, as well as looking up Firms, Vendors, Key Personnel, Parties, and Entities.

Click **Our Staff**.



Lawtrac Menu: People

If your name already appears in the staff list, click the icon under the **Edit** column to verify that your contact information is correct; make changes if necessary.

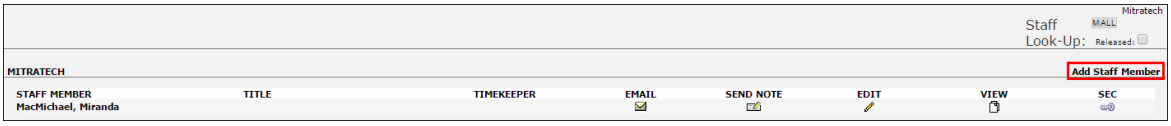
If the word "Administrator" appears in the name listing, click the icon under the **Edit** column and input the following information:

- Your first and last name
- Timekeeper ID
- Your email address

Confirm your permissions as an Administrator by navigating to **People | Our Staff**, and click the icon under the **SEC** column. If the checkbox marked "Turn All Permissions Off" is checked, click to uncheck it, then click **Save**.

1.6.2 Add Staff Members

From the **People | Our Staff** page, click **Add Staff Member**, located at the top right side of the staff list.

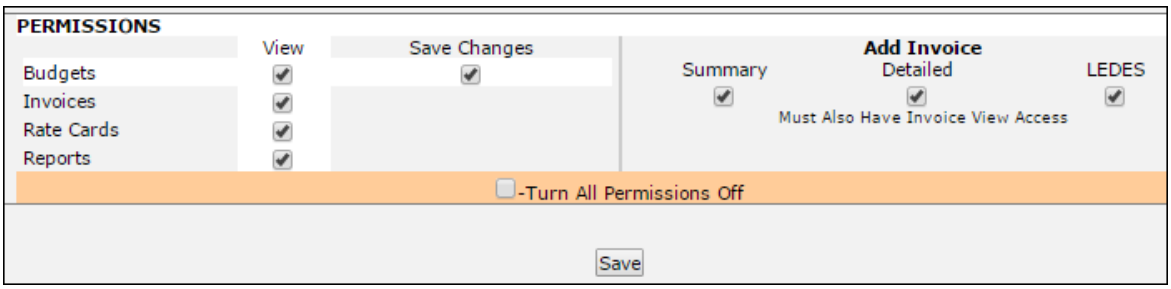


Add Staff Member

Input as much information as you have available, but make sure to fill in the staff member's first and last sames, timekeeper ID, and email address. If the staff member is accessing Lawtrac, please make note of their user name and password and provide it to the user.

Click **Save**, then under **Permissions** click all checkboxes that apply. Keep the "Turn All Permissions Off" box checked if the sole reason for adding a timekeeper is for billing purposes.

Click **Save** again.



Staff Permissions

If you are adding a staff member who only accesses Lawtrac in order to submit invoices, check the Invoices box and the type(s) of invoice they are to add (Summary, Detailed, and/or LEDES), then uncheck "Turn All Permissions Off". ***Note:*** *You may want to provide a user name and password to other staff that will be submitting invoices.*

1.6.3 Add a Rate Card for Each Staff Member

Rate cards are added by the legal department. Contact your representative to request a rate card be added to your associated matter for a specific timekeeper. You can request a general rate card for the timekeeper, or a rate card set at the matter level, if the time keeper has different rates depending on the matter at hand.

1.6.4 Add a Company Rate Card

Rate cards are added by the legal department. Contact your representative to request a rate card be added to your firm/vendor profile.

1.6.5 Submit an Electronic Invoice

Make sure the legal department has included your profile in their systems as an eBillingHub user their Lawtrac application.

Mitratech Support (ebillinghub.lawtrac@mitratech.com) gives the firm/vendor's information to eBillingHub. eBillingHub logs in on behalf of the firm/vendor to submit e-Billing invoices, using information from the firm/vendor.