MITRATECH

Lawtrac® 4.1

Lawtrac Connect User Guide

Lawtrac 4.1 Lawtrac Connect

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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/)

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

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

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1 Lawtrac Connect Installation and User Guide

The Lawtrac Connect feature is an Outlook interface created to give users the ability to associate emails to Lawtrac matters to which they are assigned from within Microsoft Outlook. This application was designed to save time for Lawtrac users who spend most of their working time in Outlook.

1.1 Installation

The current installation package works for 32bit and 64bit computers. Refer to the detailed guidelines below, or select **Document Tools** from the **Documents** tab on your Lawtrac homepage for quick instruction.

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

Important Note: The use of Lawtrac Connect counts against the overall seat licensing for in-house users in Lawtrac.

1.1.1 Step 1: Confirm Installed Programs

Go to **Control Panel | Programs and Features** and ensure the following are installed on your machine:

- Microsoft Visual Basic application
- Microsoft Visual Studio 2010 Tools for Office Runtime

If both are successfully installed and you do not have a previous version of Lawtrac Connect installed, proceed to Step 2. If both are not listed, follow the install instructions below.

To install Microsoft Visual Basic PowerPacks 10.0 application:

1. Click the link: http://go.microsoft.com/fwlink/?LinkID=145727&clcid=0x804.
2. Select **Run**.
3. Accept any prompts regarding unknown publishers.
4. After the application has successfully installed, close the window.

To install Microsoft Visual Studio 2010 Tools for Office Runtime:

1. Click the link: http://www.microsoft.com/en-us/download/details.aspx?id=44074.
2. Select **Run**.
3. Accept any prompts regarding unknown publishers.
4. After the application has successfully installed, close the window.

If this is not your first time installing Lawtrac Connect, you must uninstall any previous versions. **To uninstall your current Lawtrac Connect:**

1. Go to **Control Panel | Programs and Features**.

2. Locate Lawtrac Connect and select **Uninstall**.
3. Close the Control Panel window when complete.

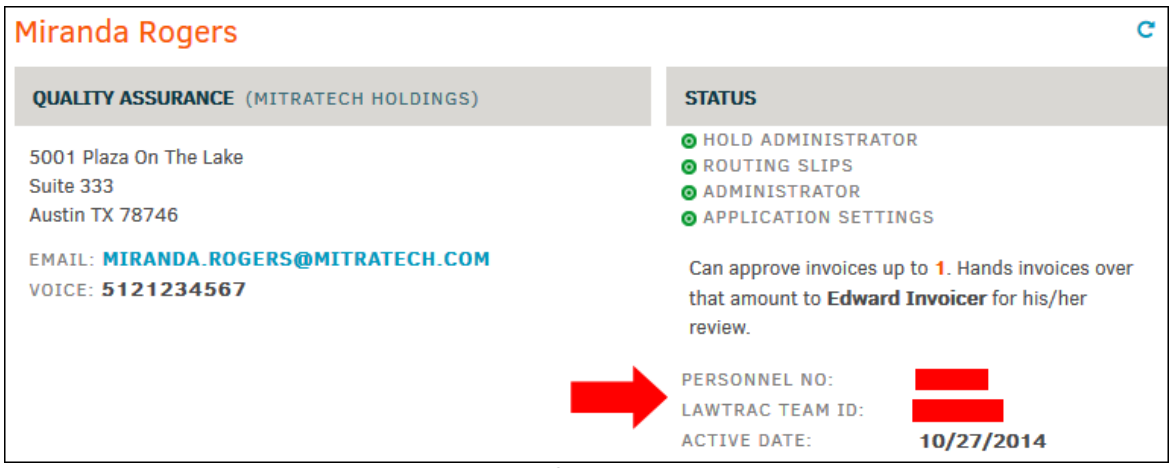
1.1.2 Step 2: Locate Lawtrac TeamID

You need to know your Team ID in the Lawtrac application.

A. On the top menu, click **People | In-House Legal Department**.

B. Locate and select your name.

C. Find your **Lawtrac Team ID** at the bottom of the page.

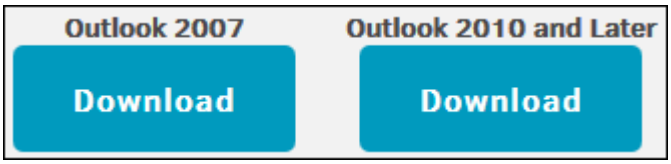


User Credentials

1.1.3 Step 3: Lawtrac Connect .zip File

A. From the homepage within your Lawtrac application, select **Document Tools** from the **Documents** tab.

B. Click the blue **Download** button to activate the LawtracConnect.zip file. Choose **Save File** and then click **OK**, or choose to open the file with Windows Explorer.

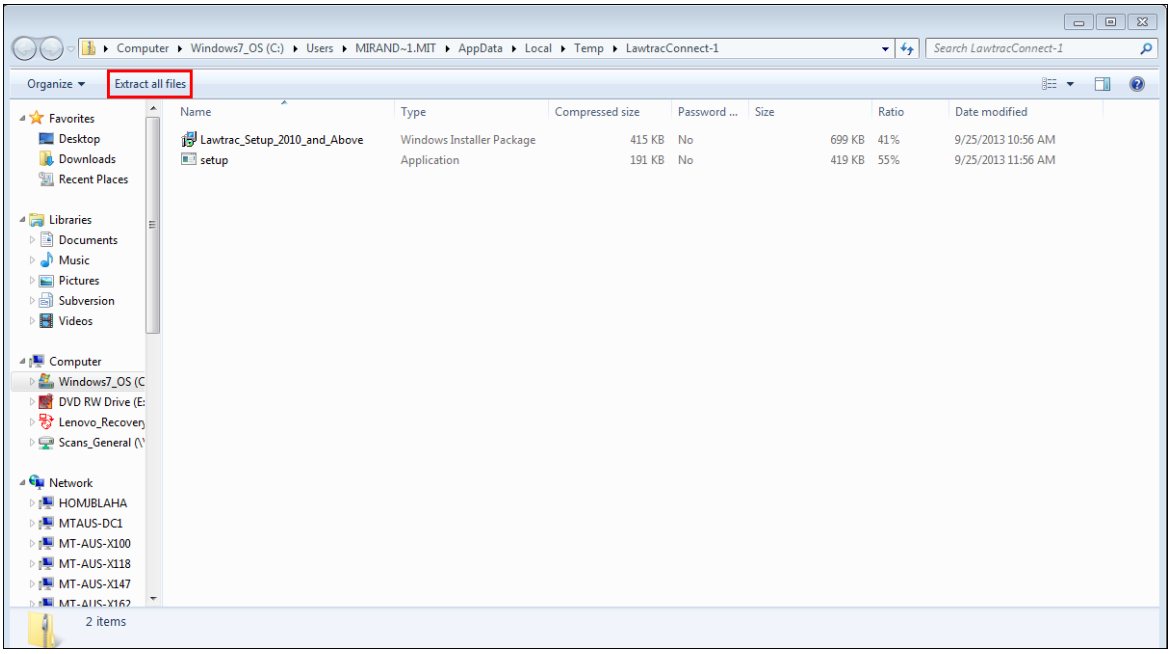


Download Connect

1.1.4 Step 4: Extract File

There will be two .zip files for the Lawtrac Connect application: **Lawtrac_Setup_2010_and_Above**, and **setup**.

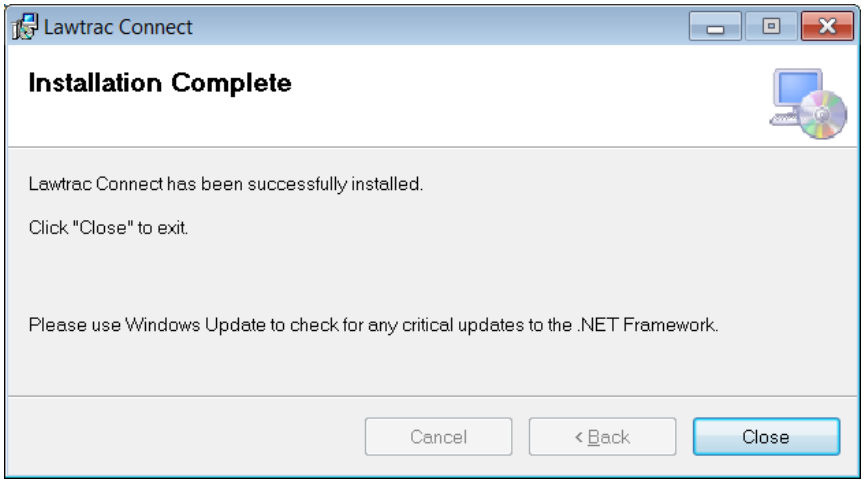
A. Click **Extract all files** in the taskbar.



Extract Files

B. Double-click the **setup** file to begin the installation process. Follow the brief instructions in the new Lawtrac Connect Setup Wizard window.

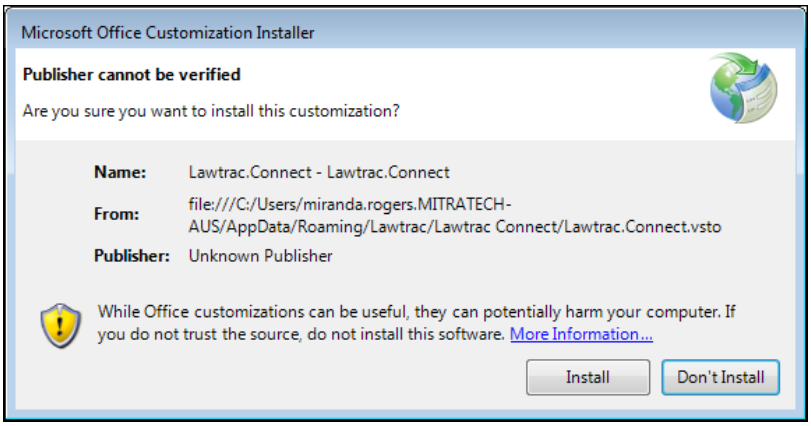
- Accept any prompts regarding unknown publisher by clicking **Run**.
- Click **Next** to accept the defaults in the installation.
- When the installation is complete, click **Close**.



Installation

1.1.5 Step 5: Open Outlook

A. Reopen Microsoft Outlook. If you receive a pop-up requesting permission to install from unknown publisher, click **Install**.



Install

B. In the new Lawtrac Connect Setup Template (shown below), type your Team ID into the "Team ID" text field.

Setup Template

C. The URL should be pre-populated with your site.

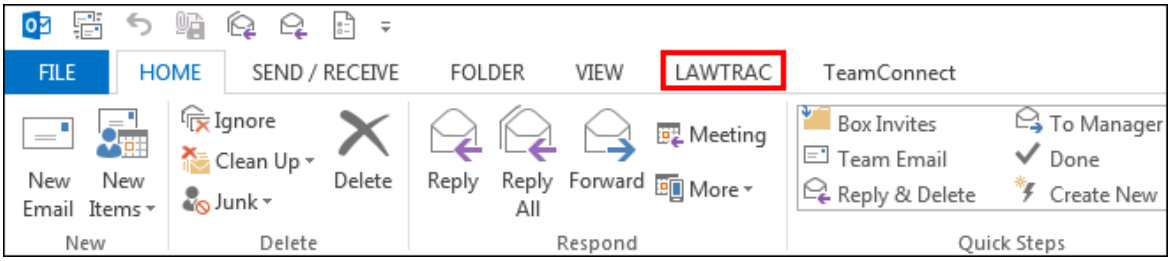
   i. In the **Team ID** field, enter your personal Team ID from Step 2.

   ii. Contact Lawtrac Support to obtain the Upload Path and the Web service URL.

   iii. Save the settings.

   iv. Click **Close**.

D. Lawtrac Connect automatically loads into Outlook: "Lawtrac" is added to the menu bar and the bottom pane displays the Lawtrac Connect add-in.



Lawtrac Tab in Outlook

1.1.6 Troubleshooting

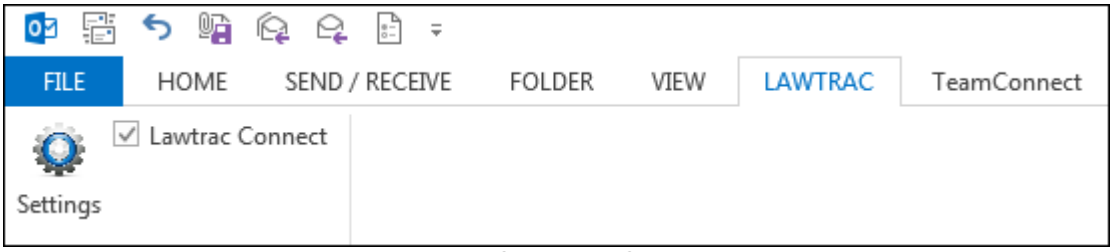
If, after completing the installation, the setup template does not automatically display or the Lawtrac option does not appear on the menu bar, perform the following tasks:

- Ensure Microsoft Visual Basic application and Microsoft Visual Studio 2010 Tools for Office Runtime are installed and listed in **Programs** and **Features**. If they are not, you need to install the programs; uninstall Lawtrac Connect, and reinstall.
- Ensure the Lawtrac Connect add-in is enabled in Microsoft Outlook.
  - Outlook 2007
    - Tools
    - Trust Center
    - Add-ins
    - Verify that the Lawtrac Connect Add-in is listed under **Active Application Add-ins**
  - Outlook 2010
    - File
    - Options
    - On left sidebar, click **Add-ins**
    - Verify that the Lawtrac Connect Add-in is listed under **Active Application Add-ins**

If Lawtrac Connect Add-in is listed under **Inactive** or **Disabled**, highlight the add-in and click **Go**. Check the box next to Lawtrac Connect Add-in and click **OK**. Select **File | Exit** to close Outlook and then reopen.

1.2 Using Lawtrac Connect

After a successful installation, Lawtrac Connect loads automatically when you open Outlook. The Lawtrac option on the Outlook menu bar has a **Settings** link and a Lawtrac Connect switch to hide/ display the feature.



Lawtrac Settings in Outlook

1.2.1 Attach a Matter

The Lawtrac Connect feature is an Outlook interface created to give users the ability to associate emails to matters to which they are assigned from within Microsoft Outlook.

Attach an Attachment (Document) or Email to an Assigned Matter

1. Select the matter in the drop-down.
2. Click on the email or attachment to be added and drag it into the box. ***Note:*** The upload process will start after a few seconds. Do not repeat.
3. If the drag-drop into Lawtrac Connect is successful, a green 'Success' bar displays in the drag-drop area. Note that the Success bar indicates that it has been successfully pulled into the Lawtrac Connect temporary holding area, not necessarily successfully into the Matter.

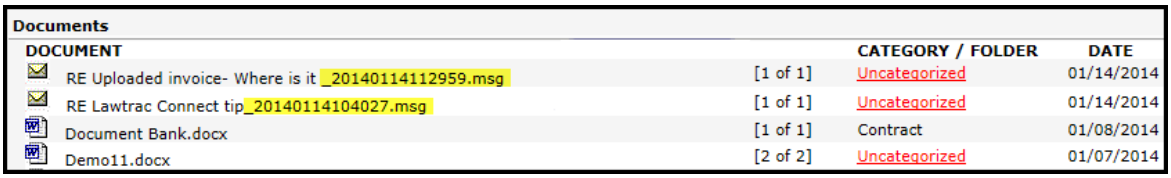
Connect Drag-and-Drop

When emails and attachments are uploaded to a matter via Lawtrac Connect, they are displayed in the destination matter record (via **Documents | Detailed List | Associated Documents** area of the **Main Matter Screen**). Emails are uploaded as .msg documents and can be viewed, as well as the attachments.

> ***Note****: Users can force the plugin to refresh by clicking on a different item/email in Outlook. (Does not require syncing the new items.) This action uploads any queued emails to Lawtrac.*

When uploaded, the Lawtrac Connect upload process adds a tag to the document name with the date added plus a control number, and "Added via Lawtrac Connect" is added automatically to the document Synopsis field. The tag number is unique to each Lawtrac Connect upload so if the same

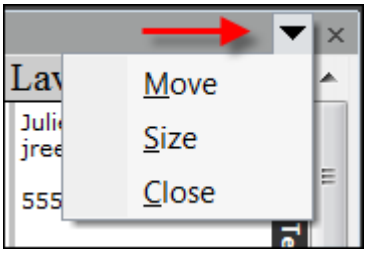
email (i.e., same email subject line) is uploaded more than once to a matter, the tag tracks which was uploaded first.



Document Tag Track

1.2.1.1 Move/Resize

On the top bar you can find a down arrow and the 'X' to close out of Lawtrac Connect. Clicking the arrow displays 3 options: **Move**, **Size**, or **Close**.



- **Move**—Relocate the Lawtrac Connect box to another area within your Outlook
- **Size**—Drag in the edges of the Lawtrac Connect box to the desired size
- **Close**—Exit out of the Lawtrac Connect tool

1.2.1.2 Matter Drop-Down

The "Matter" drop-down contains up to 1,000 matters to which you are assigned, listed in alphabetical order. Matters that have been closed within the past 90 days are included in the selection list.

Note: If your matter selection list begins with blank lines, this is due to matters that have been deleted. Contact Lawtrac Support regarding matter clean-up.

If you are assigned to a large number of matters, it may be difficult to locate a specific matter. To find a record quickly, open the selection list and key an initial letter to jump to the matter prefix for that letter/number.

Click the **Refresh** button to update the list.

Lawtrac Matters

1.2.1.3 Drag-and-Drop Box

Once the appropriate matter has been selected, click on the email or attachment to be added and drag it into the box.

Note: The upload process may take a few seconds to start. Do not repeat.

If the drag/drop into Lawtrac Connect is successful, a green **Success** bar displays in the drag-drop area.

Note: The success bar indicates that it has been successfully pulled into the Lawtrac Connect temporary holding area, not necessarily that it was pulled successfully into the matter record.

If you drag an email attachment (document) with an unauthorized extension to a matter, that document is not added to the matter. The user receives an automatic "Unauthorized File Upload" internal message in Lawtrac. The green success bar may appear, however, signifying the file was transferred, but it is not accepted by the application.

1.3 Viewing Lawtrac Connect Updates in Lawtrac

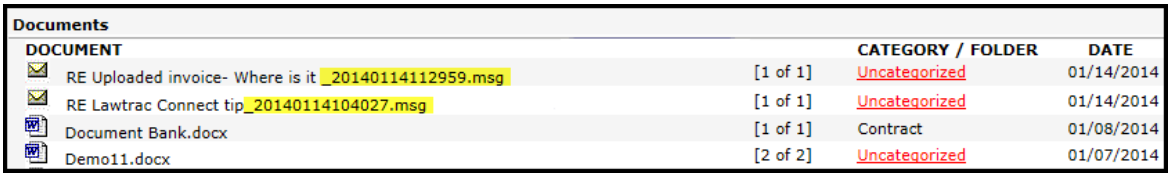
Select a category to learn more:

- Documents
- Text Records
- Calendar

1.3.1 Documents

When emails and attachments are uploaded to a matter via Lawtrac Connect, they are displayed in the destination matter (via **Documents | Detailed List | Associated Documents** area of the **Main Matter Screen**). Emails are uploaded as .msg documents and can be viewed, as can the attachments.

When uploaded, the Lawtrac Connect upload process adds a tag to the document name with the date added plus a control number, and **Added via Lawtrac Connect** is added automatically to the document **Synopsis** field. The tag number is unique to each Lawtrac Connect upload so if the same email (i.e., same email subject line) is uploaded more than once to a matter, the tag tracks which was uploaded first.



Documents

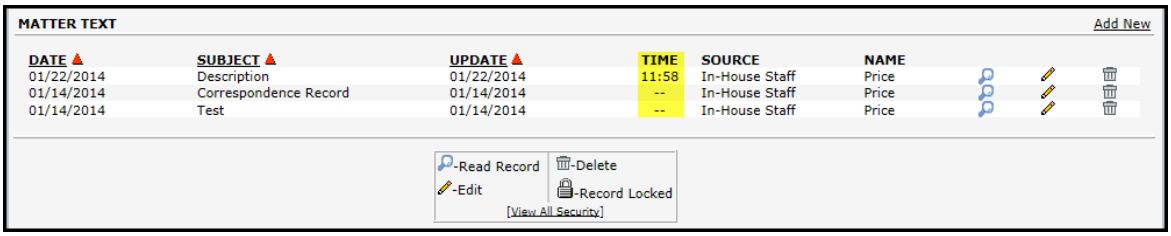
DOCUMENT		CATEGORY / FOLDER	DATE
RE Uploaded invoice- Where is it _20140114112959.msg	[1 of 1]	Uncategorized	01/14/2014
RE Lawtrac Connect tip_20140114104027.msg	[1 of 1]	Uncategorized	01/14/2014
Document Bank.docx	[1 of 1]	Contract	01/08/2014
Demo11.docx	[2 of 2]	Uncategorized	01/07/2014

Documents

1.3.2 Text records

Text records added to a matter via the Notes feature in Lawtrac Connect display within the matter record. The **Time** column is not populated for records added via Lawtrac Connect, but a **Control Number** is assigned.

Text record access for outside counsel and key personnel defaults to the setting for each text category.



Text Records

1.3.3 Calendar

Events added via Lawtrac Connect display on the matter's **Calendar** page, and are added to the matter's **Month View**. Editing an event from the matter also updates in Lawtrac Connect.

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