Lawtrac

Lawtrac Connect Installation and User Guide

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Revision History

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

INSTALLATION

The current installation package works for Windows 7, 8 or 10 OS, 32bit and 64bit computers. Supported MS Office versions are MS Office 2010, MS Office 2013 and MS Office 2016. Prior to installing Lawtrac Connect, ensure that all previous versions of Lawtrac Connect are uninstalled. Refer to the detailed guidelines below, or click the **Documents>Document Tools>Lawtrac Connect** under your Lawtrac Home Page for quick instruction.

NOTE: The use of Lawtrac Connect will count against the overall seat licensing for in-house users in Lawtrac.

Step 1: Confirm Installed Programs

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

- Microsoft Office for 2010 and above

If it is successfully installed and you do not have a previous version of Lawtrac Connect installed, proceed to Step 2.

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

- Go to Control Panel | Programs and Features.
- Locate **Lawtrac Connect** and select Uninstall.
- Close the Control Panel window when complete.

Important Note: During the Lawtrac Connect installation, your Outlook must be closed.

Step 2: Locate Lawtrac TeamID

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

- On the top menu, click People | In-House Legal Department.
- Locate and select your name from which you are logged in.
- Find your TEAMID number at the bottom of the page.

Step 3: Lawtrac Connect .zip File

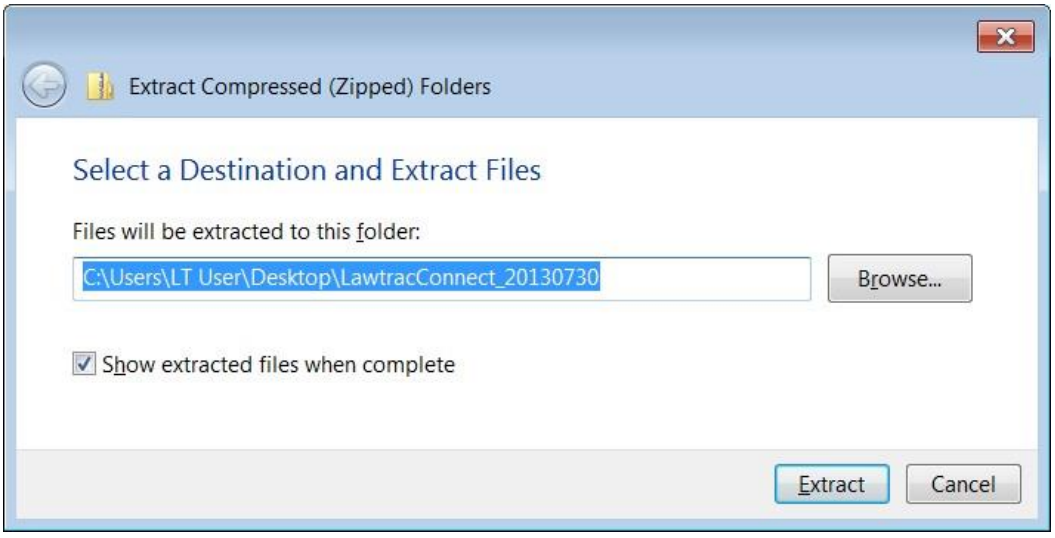
From the Home Screen within your Lawtrac, click **Documents> Document Tools> Lawtrac Connect** under your Lawtrac Home page.

- Click the blue Download button to activate the **LawtracConnect.zip** file.

- Click **Save as** and save the file to your desktop.

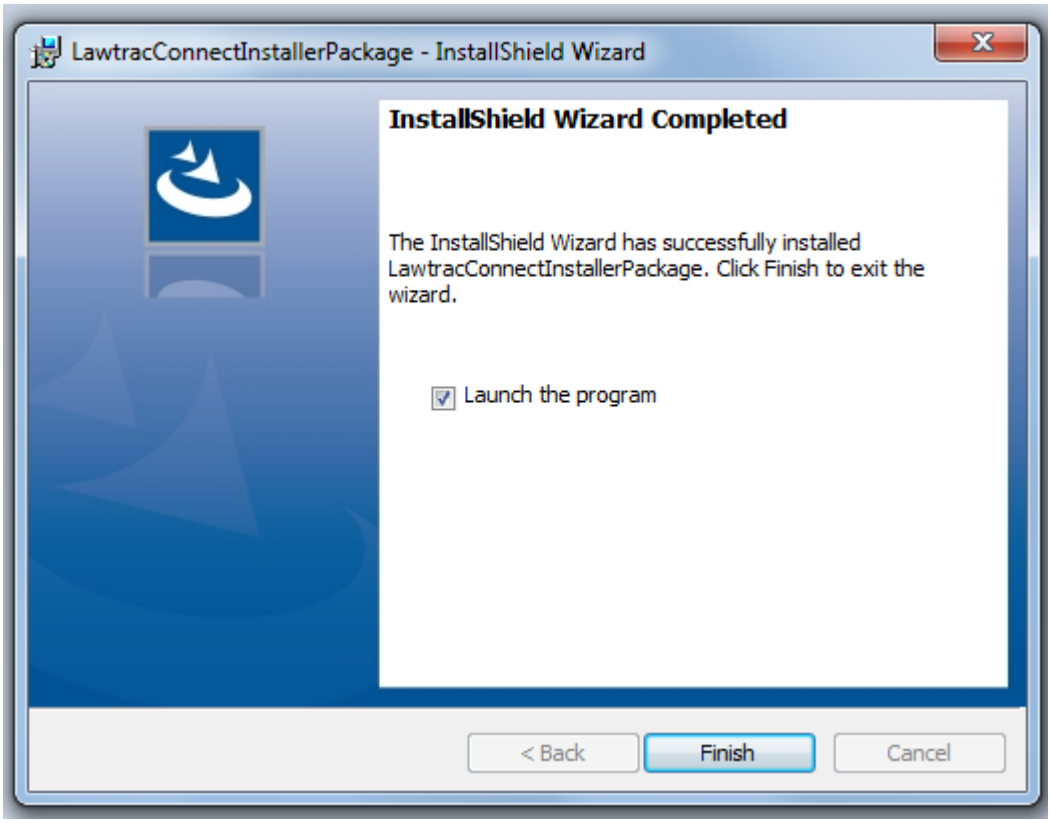
Step 4: Extract File

1. On your desktop, right-click the .zip file and select **Extract All** (or Un-zip).
2. Accept the default location; click Extract.



3. When the extract process is complete, the folder will open and you will see one file in the folder.

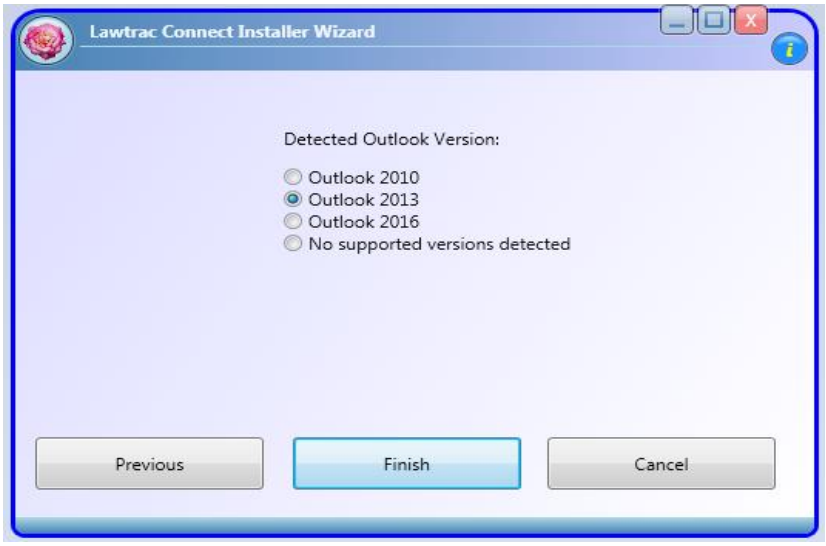
4. Double-click the **setup.exe** file.
   a. Accept any prompts regarding unknown publisher by clicking "Run".
   b. Click Next to accept the defaults in the installation.
   c. When the installation is complete, click Finish to launch the Lawtrac Connect Installer Wizard.



Step 5: Lawtrac Connect Installer Wizard

1. Click Next to proceed with the installation of Lawtrac Connect Installer Wizard.

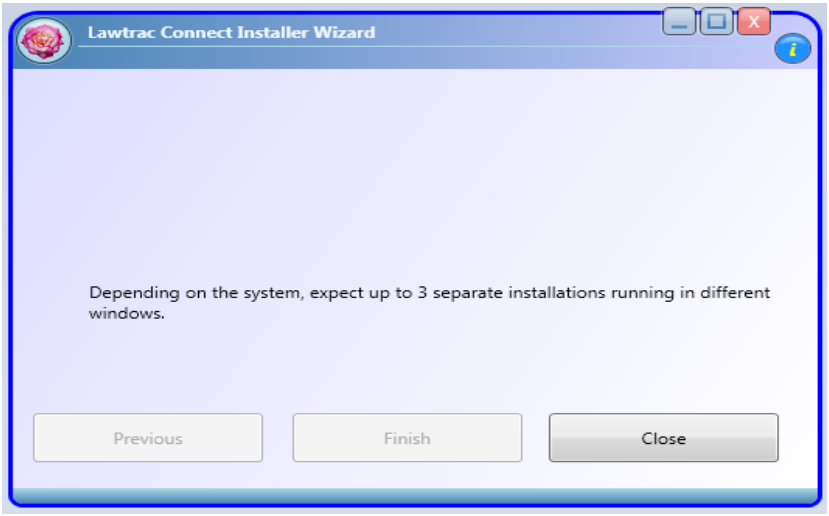
2. The installer will automatically detect the MS Office version. If a previous version of Lawtrac Connect is installed on your machine, the installer will provide a warning message: "**Previous version of plugin is detected, please uninstall the previous version and then install the new version of plugin.**"



3. Click Finish to start the Installation of Lawtrac Connect Plugin.

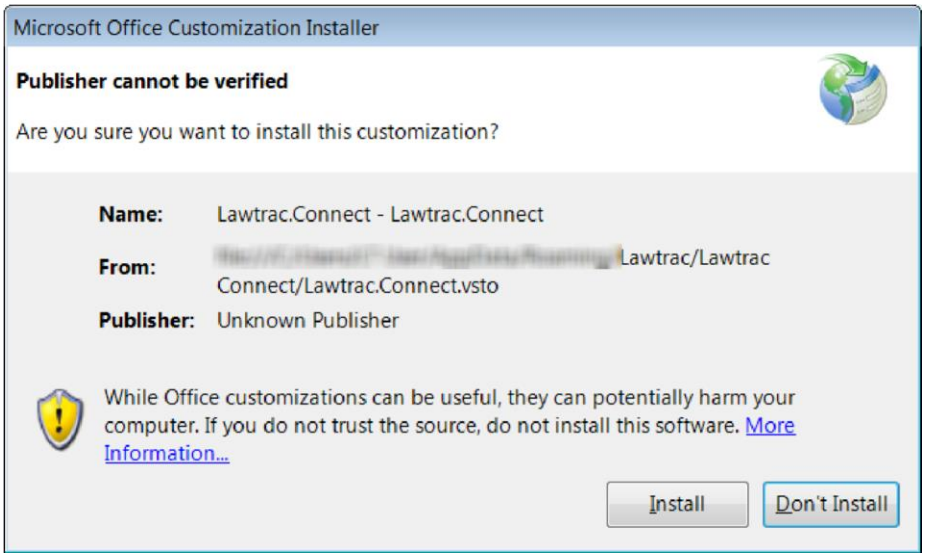
4. LawtracConnectSetup – InstallShield Wizard
    a. Click Next to accept the terms in the license agreement.
    b. Accept all other defaults in the installation.
    c. Accept any prompts regarding unknown publisher by clicking "Run".
    d. When the installation is complete, click Finish.

5. Click Close to complete the Lawtrac Connect Installer Wizard.

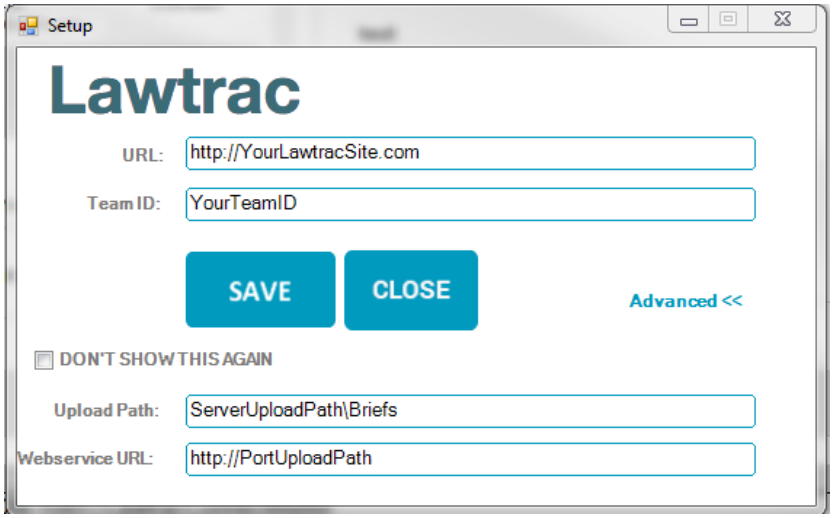


Step 6: Open Outlook

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



The Setup template will display. Click Advanced>>.

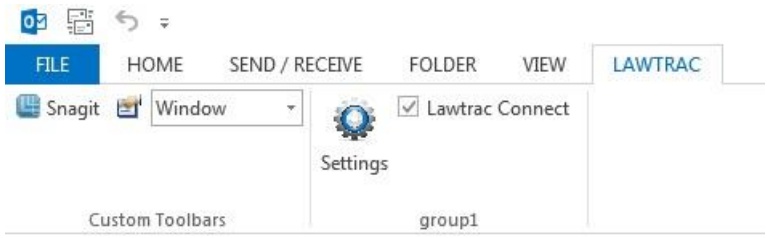


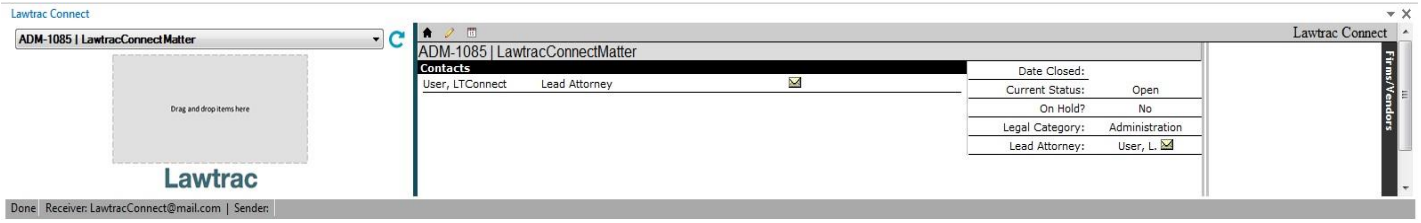
- A sample URL will be pre-populated. Change it to your Lawtrac site.
- In the Team ID field, **enter your personal TeamID from Step 2**.

Contact Lawtrac Support to obtain the Upload Path and the Webservice URL. If your company hosts Lawtrac in-house, contact your IT Department to request the Upload Path and the Webservice URL. If assistance is required, contact the Lawtrac Support Desk at Support@lawtrac.com or (800) 453 – 1698 x100.

- Save the settings.
- Click Close.

Lawtrac Connect will automatically load into Outlook: 'Lawtrac' is added to the menu bar and the bottom pane displays the Lawtrac Connect add-in.





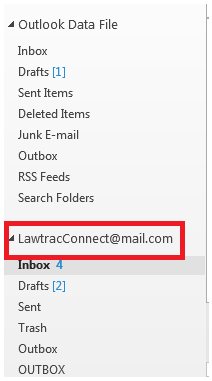
Troubleshooting

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

- Ensure the Lawtrac Connect add-in is enabled in Microsoft Outlook.
  Outlook 2010 or later
  - 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.

Some of the supported Windows OS versions default the Lawtrac Connect plugin in Outlook to Outlook Today. In order for the Settings to sync, the user needs to move the active Window to the Inbox / Sent or any other Directory that contains emails or to the LT Connect active window.

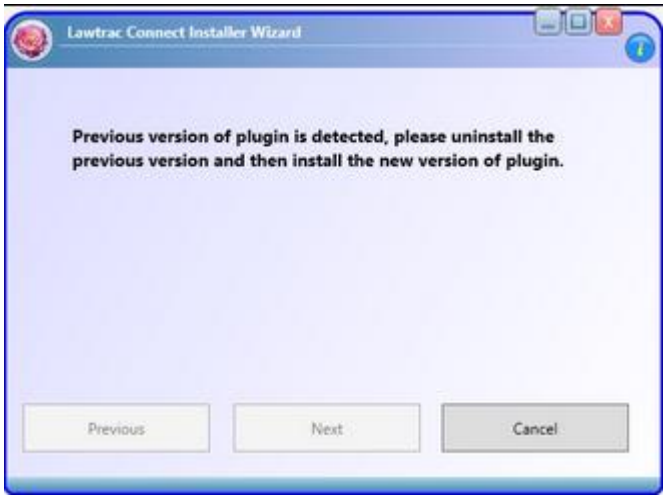


Common Issues & Solutions

Issue:

After uninstalling the plugin, the uninstalled plugin may still be detected during the installation process.

If you encounter the following error message during installation, it could indicate the older version is still installed or the uninstall process was not successful or completed. Verify that the older plugin has been removed from the system.

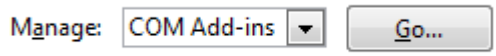


Solution:

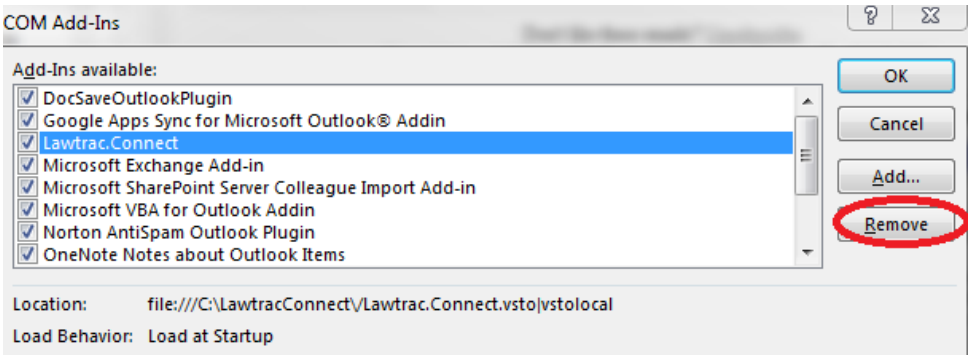
If the error message reappears:

1. Open Outlook
2. Navigate to File > Options > Add-ins.

3. Select **COM Add-ins** from the drop-down menu.
4. Click the **Go** button.



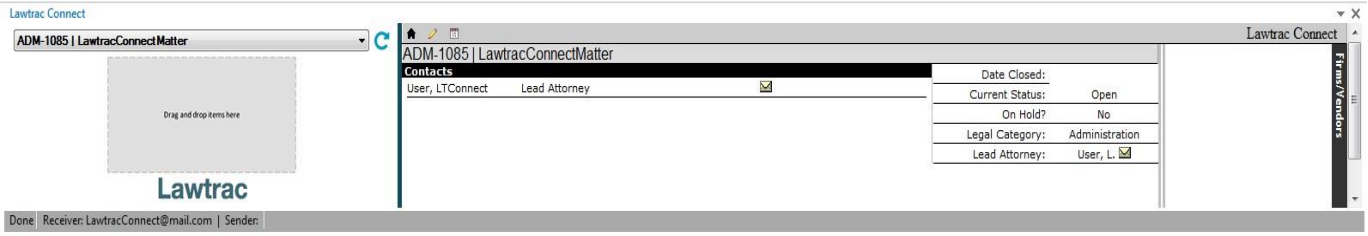
5. Select **Lawtrac.Connect** and click the **Remove** button.



6. Close Outlook and start the installation process from the beginning. See page 4.

USING LAWTRAC CONNECT

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



Turn On/Off

You can 'hide' or turn off Lawtrac Connect in 2 places:

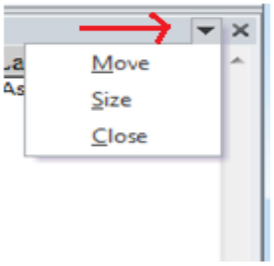
1. On the Outlook menu bar, hover over Lawtrac and click Lawtrac Connect from the drop down.
2. On the top bar of Lawtrac Connect, click the down arrow and click 'Close' or just click the 'X'.

To turn Lawtrac Connect back on, click Lawtrac Connect from the Lawtrac option on the Outlook menu bar.

Features

Move/Resize

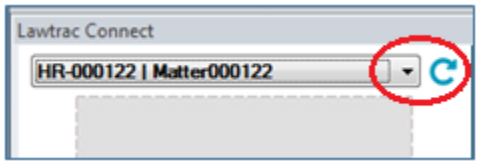
On the top bar you will find a down arrow and the 'X' to close out of Lawtrac Connect. Clicking the arrow displays 3 options: Move, Size, or Close.



Move – Relocate the Lawtrac Connect box to another area within Outlook.

Size – Drag in the edges of the Lawtrac Connect box to the desired size.

Matter Drop Down



The matter drop down contains up to 1000 matters you are assigned to, listed in alphabetical order by matter name. 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.

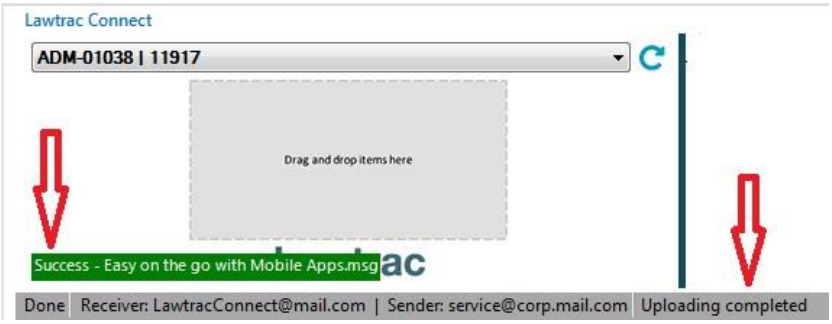
If you are assigned to a large number of matters, it may be difficult to locate a specific matter. To find a matter quickly, open the selection list and key an initial letter to jump to the matter prefix for that letter/number.

Click the refresh button to update the list.

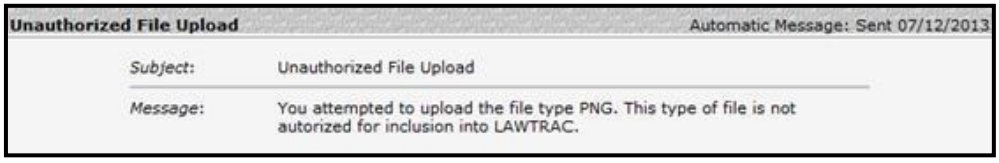
Drag and Drop Box

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 will start after a few seconds, DO NOT REPEAT.**

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

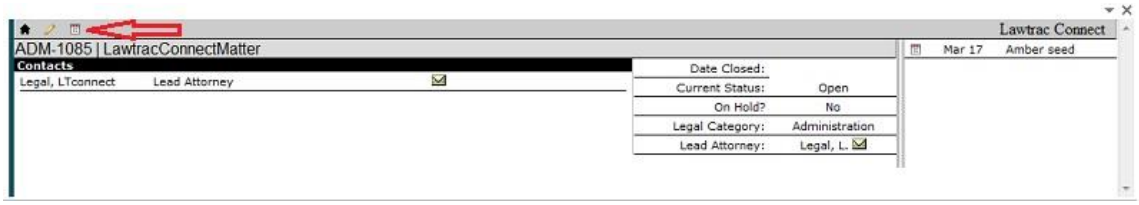


If you drag an email attachment (document) with an unauthorized extension to a matter, that document is not added to the matter. The user receives an automatic "Unauthorized File Upload" internal message in Lawtrac. The green Success bar may appear however, signifying the file was transferred, but it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



Matter Information Area

This area defaults to information about the currently-selected matter, including the legal team assigned and key matter data.



If the Lead/Primary role is not filled, the Primary row displays "No Lead Role."

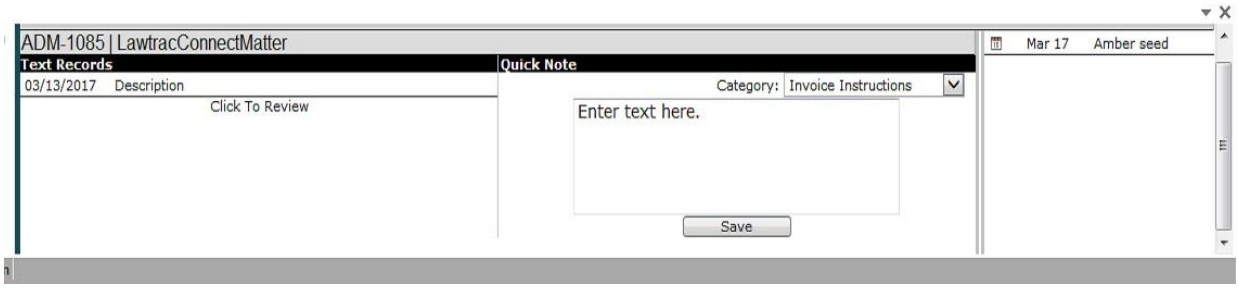
Date Closed:	03/01/2017
Current Status:	Closed
On Hold?	No
Legal Category:	Administration
Lead Attorney:	Legal, L.

If the matter is closed, the Date Closed field will display the closed date, otherwise it will remain blank.

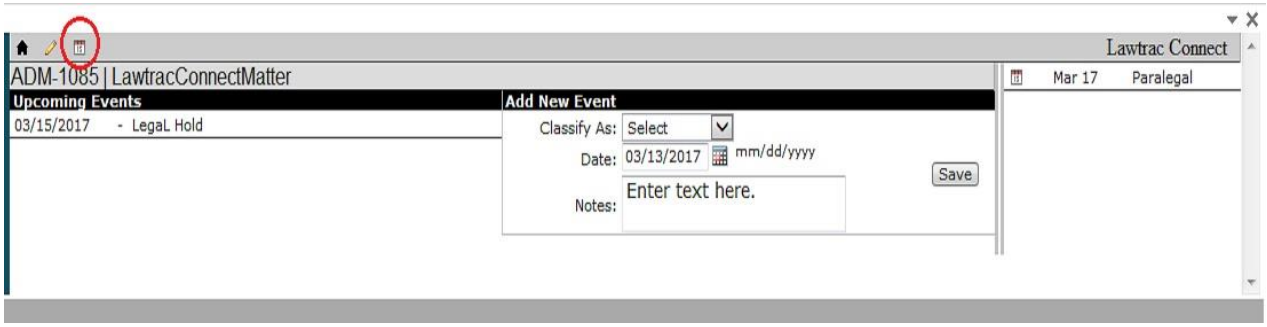
The *Status* field will display the matter status set in the *Close/Status Actions > Matter Status* page in Lawtrac. Please note, if a status is technically closed, the *Status* field might display an Open status if it's not updated in the *Close/Status Actions > Matter Status* page in Lawtrac.

Home – Refreshes the middle matter information area for the currently-selected matter.

Notes – Refreshes middle area to display a Text Records/Quick Note area. Current text records are listed to the left, new text can be added and categorized on the right. Click Save to add the new text to the listing and to the matter. Click on existing text record to view details.

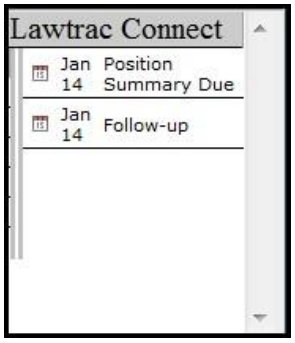


Events – Refreshes middle area to display the selected matter's Upcoming Events and a place to add a new event. The Outside Counsel access default is no access.

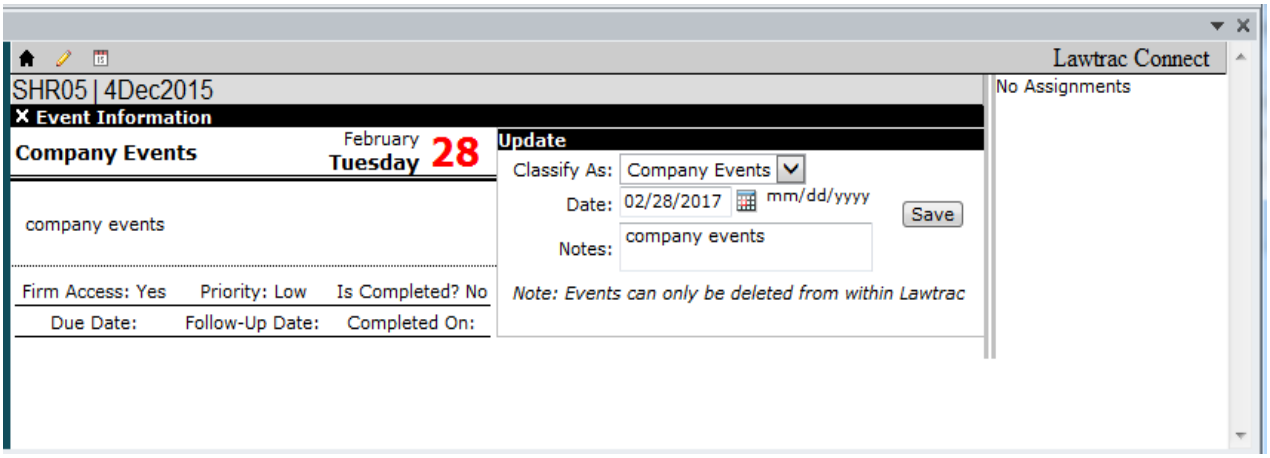


Email Contact Information

The far-right area looks at the email currently highlighted and displays the sender's name, email and phone number if available. If the current email is not from an individual, then the right area will display YOUR Today's Events or your Upcoming Events, regardless of the matter selected. If there are no scheduled events, the area will remain blank.



You can click on an event to display the event metadata and any comment(s). Click the X in the top left to close the event display.



VIEWING LAWTRAC CONNECT UPDATES IN LAWTRAC

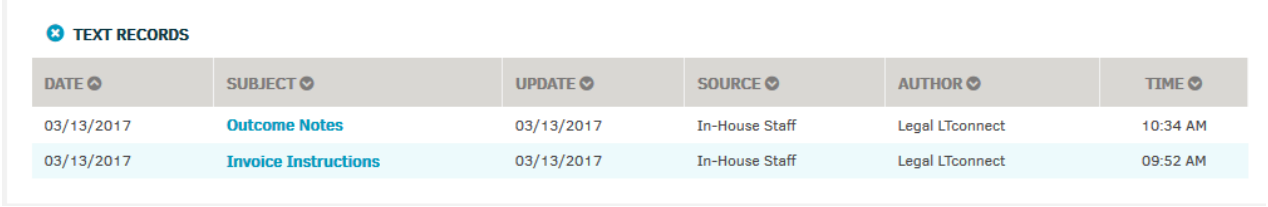
Documents

When emails and attachments are uploaded to a matter via Lawtrac Connect, they display in the destination matter (via Documents page, Detailed List page, and Associated Documents area of the Main Matter Screen). Emails are uploaded as .msg documents and can be viewed, as well as any attachments. *Note: It may take up to 45 mins for the emails or attachments to be uploaded to a matter via Lawtrac Connect. This time depends on the server where the application is hosted.*

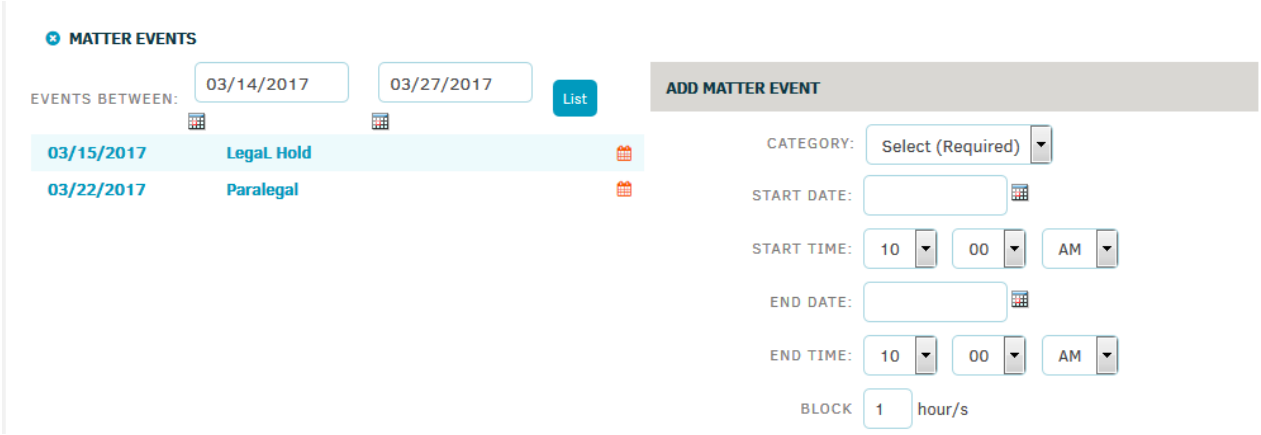
When uploaded, the Lawtrac Connect upload process adds a tag to the document name with the date added plus a control number, and "Added via Lawtrac Connect" is added automatically to the document Synopsis field. The tag number is unique to each Lawtrac Connect upload so if the same email (i.e., same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

Text records

Text records added to a matter via the Notes feature in Lawtrac Connect display in the matter like usual – **Matter > Text Records > List / Manage**.



Text record access for Outside Counsel and Key Personnel defaults to the setting for each text category.

Calendar

Events added via Lawtrac Connect display on the matter's Calendar page (**Matter > Calendar & Events > Events: View / Edit / Add**), and are added to the matter's Month View. Editing an event from the matter also updates in Lawtrac Connect.