



# **Lawtrac Connect Installation and User Guide**

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#### Revision History

REVISION	DATE	NAME	DESCRIPTION
1.0	2/4/2014	Maddison Price	Document Created

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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 32bit and 64bit computers. Refer to the detailed guidelines below, or click the *Lawtrac Connect For Outlook* button on 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 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:*

- Click the link: <http://go.microsoft.com/fwlink/?LinkID=145727&clcid=0x804>.
- Select "Run".
- Accept any prompts regarding unknown publisher.
- After the application has successfully installed, close the window.

*To install Microsoft Visual Studio 2010 Tools for Office Runtime:*

- Click the link: <http://www.microsoft.com/en-us/download/confirmation.aspx?id=40790>
- Select "Run".
- Accept any prompts regarding unknown publisher.
- 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:

- 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 | Legal Staff.
- Locate and select your name.
- Find your TEAMID number at the bottom of the page.

Personnel No: 374 | TeamID: TB374

## Step 3: Lawtrac Connect .zip File

From the Home Screen within your Lawtrac, click the *Lawtrac Connect for Outlook* button and proceed to Step 6.

**Lawtrac Connect**  
For Outlook

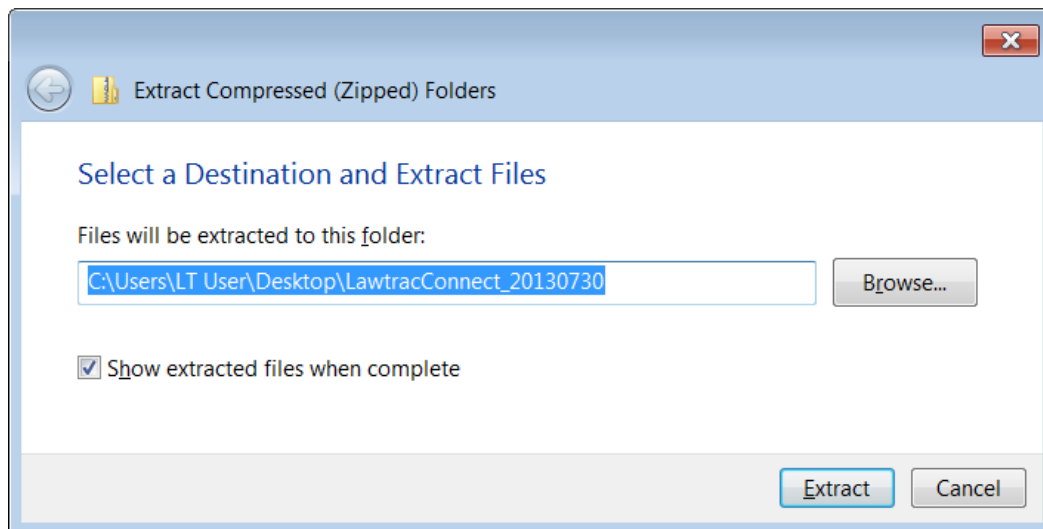
- Click the blue Download button to activate the LawtracConnect.zip file.

**Download**

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

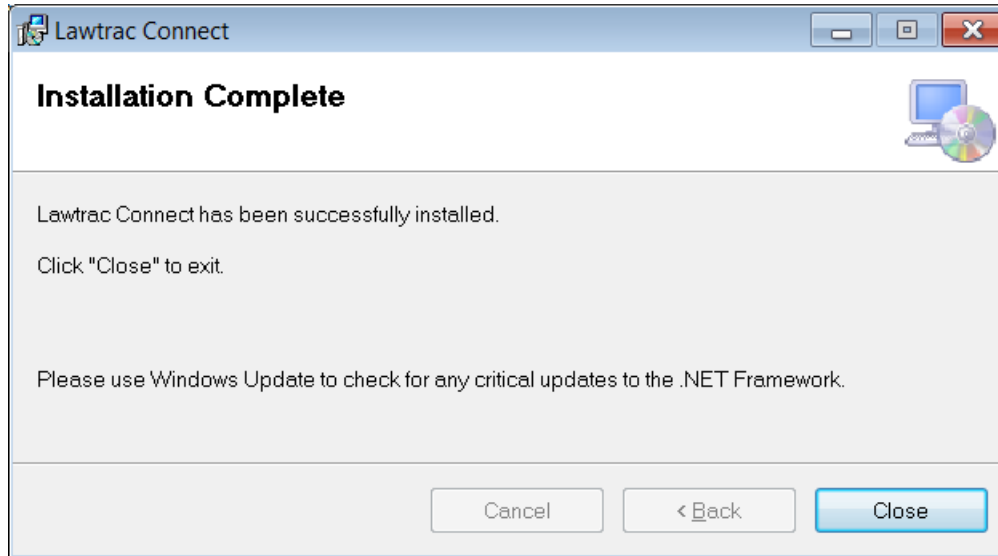
## Step 4: Extract File

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



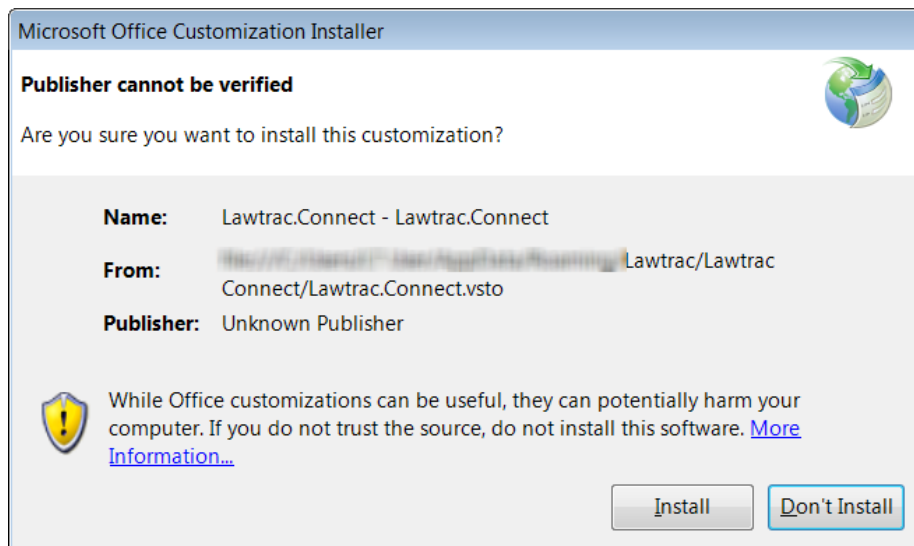
3. When the extract process is complete, the folder will open and you will see two files in the folder.

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



## Step 5: Open Outlook

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

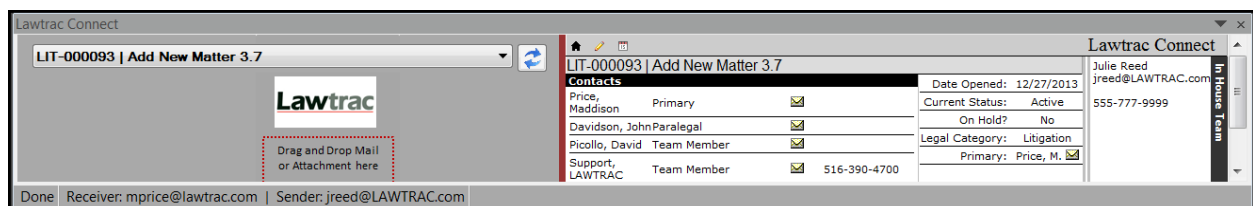
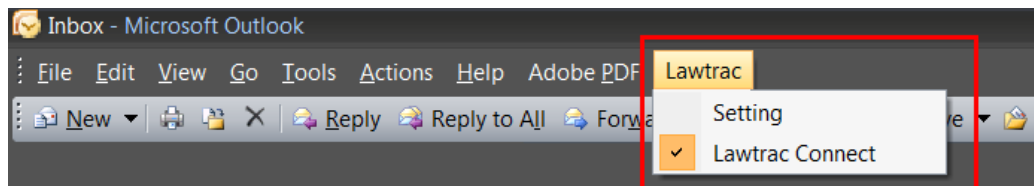


The Setup template will display. Click Advance>>.

The image shows a 'Setup' dialog box for Lawtrac. The title bar says 'Setup'. The main area has the Lawtrac logo and the text 'MANAGEMENT SOLUTIONS FOR IN-HOUSE LAW DEPARTMENTS'. There are four input fields: 'URL', 'Team ID', 'Upload Path', and 'Webservice URL'. Below the 'URL' field is an 'Advance <<' button. To the right of the 'Team ID' field are 'SAVE' and 'CLOSE' buttons. Below the 'Team ID' field is a checkbox labeled 'DON'T SHOW THIS DIALOGUE NEXT TIME'. Below the 'Upload Path' and 'Webservice URL' fields are empty input boxes.

- The URL will be pre-populated with your 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.
- 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 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 will need to install the programs, uninstall Lawtrac Connect, and reinstall.

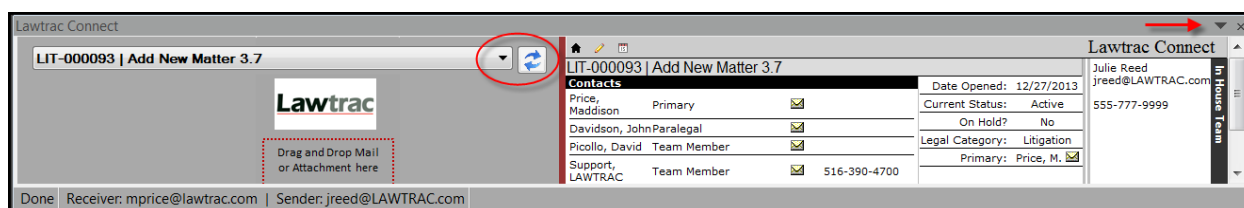
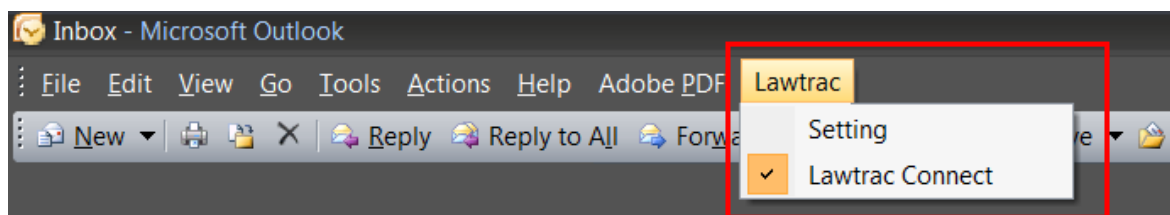
- Ensure the Lawtrac Connect add-in is enabled in Microsoft Outlook.
  - Outlook 2007
    - Tools
    - Trust Center
    - Add-ins
    - Verify that the Lawtrac Connect Add-in is listed under 'Active Application Addins'
  - Outlook 2010
    - File
    - Options
    - On left sidebar, click Add-ins
    - Verify that the Lawtrac Connect Add-in is listed under 'Active Application Addins'

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



## 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:

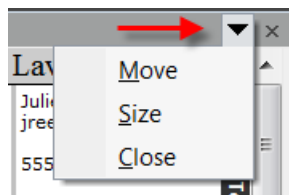
1. On the Outlook menu bar, hover over Lawtrac and click Lawtrac Connect from the drop down.
2. On the top bar of Lawtrac Connect, click the down arrow and click 'Close' or just click the 'X'.

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 your Outlook.

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

## Matter Drop Down

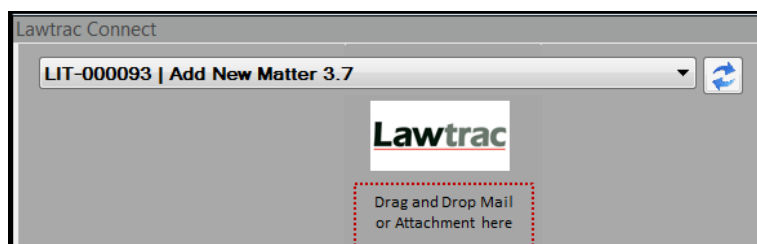


The matter drop down contains up to 1000 matters you are assigned to, listed in alphabetical order by matter name. Matters that have been closed within the past 90 days are included in the selection list. **Note:** If your matter selection list begins with blank lines, this is due to matters that have been deleted. Contact Lawtrac Support regarding matter clean up.

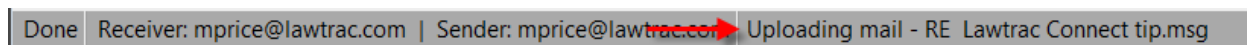
If you are assigned to a large number of matters, it may be difficult to locate a specific matter. To find a matter quickly, open the selection list and key an initial letter to jump to the matter prefix for that letter/number.

Click the refresh button to update the list.

## Drag and Drop Box



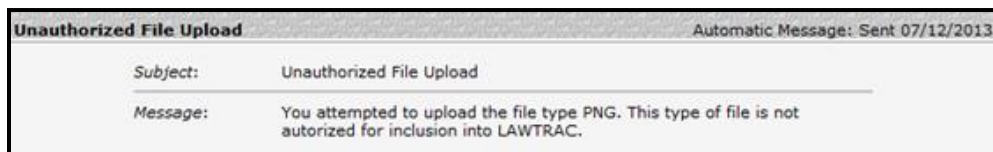
Once the appropriate matter has been selected, click on the email or attachment to be added and drag it into the box. **Note: The upload process will start after a few seconds, DO NOT REPEAT.**



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

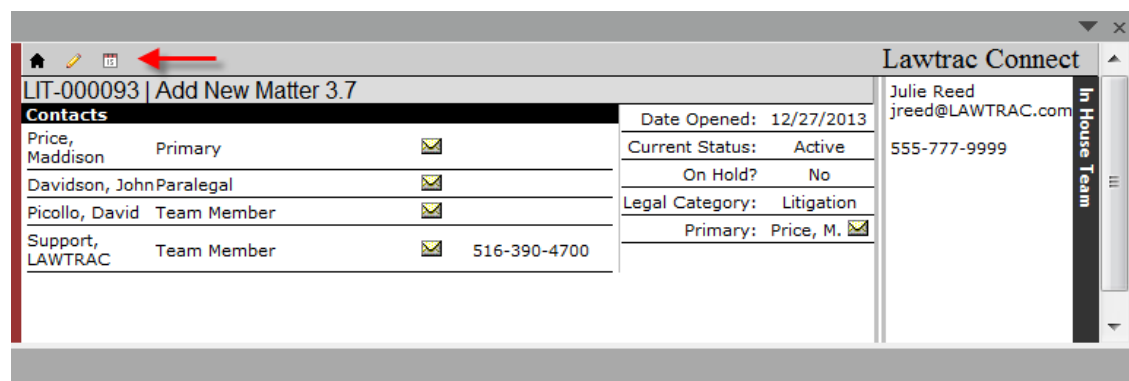


If you drag an email attachment (document) with an unauthorized extension to a matter, that document is not added to the matter. The user receives an automatic "Unauthorized File Upload" internal message in Lawtrac. The green Success bar may appear however, signifying the file was transferred, but it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

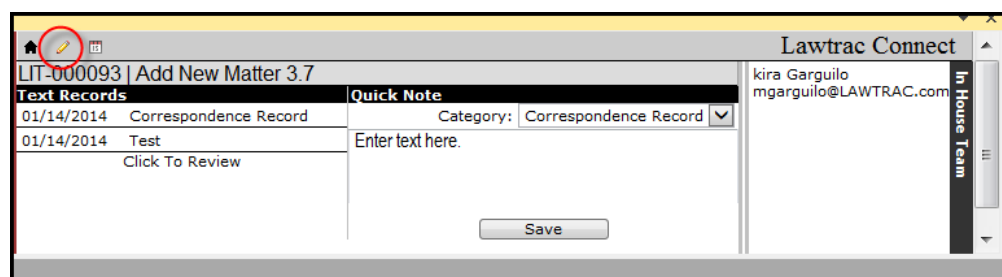



If the Lead/Primary role is not filled, the Primary row displays "No Lead Role."

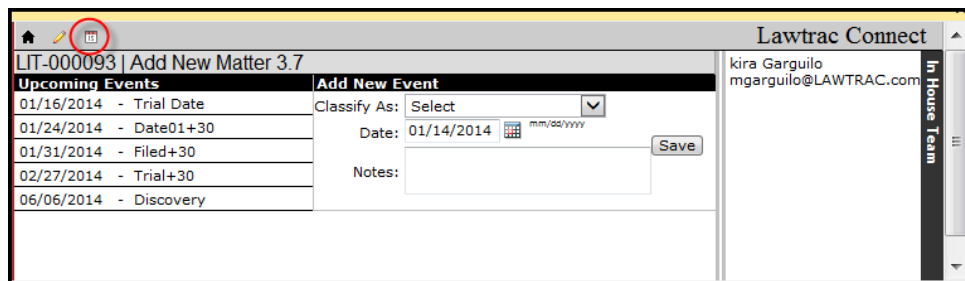
Date Opened:	01/17/2013
Current Status:	Open (Active)
On Hold?	No
Legal Category:	General Internal
No Lead Role	

**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.

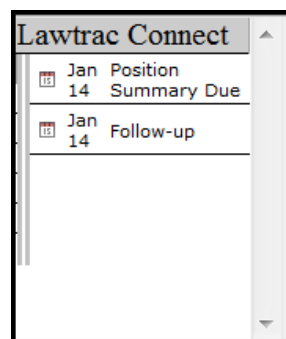


**Events**  – Refreshes middle area to display the selected matter’s Upcoming Events and a place to add a new event. The Outside Counsel access default is no access.

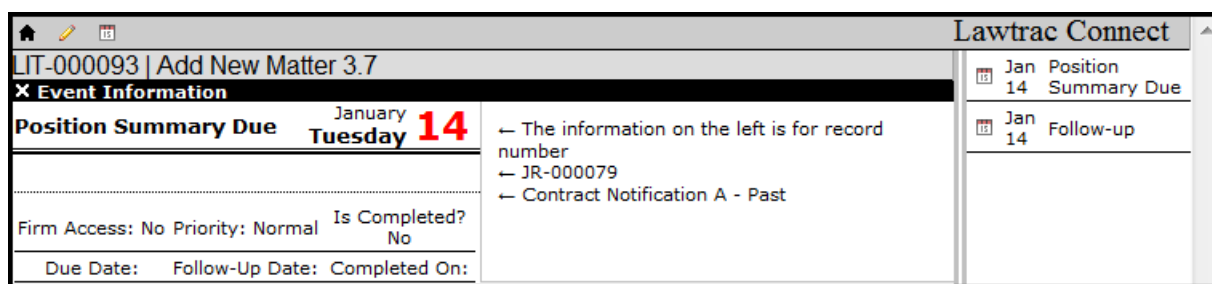


## Email Contact Information

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.

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 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

Document tag from upload.

## Text records

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

MATTER TEXT							Add New		
DATE ▲	SUBJECT ▲	UPDATE ▲	TIME	SOURCE	NAME				
01/22/2014	Description	01/22/2014	11:58	In-House Staff	Price				
01/14/2014	Correspondence Record	01/14/2014	--	In-House Staff	Price				
01/14/2014	Test	01/14/2014	--	In-House Staff	Price				

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, and are added to the matter's Month View. Editing an event from the matter also updates in Lawtrac Connect.

Refine Event List			
Display items between:		12/15/2013	06/06/2014
		<input type="checkbox"/> - Display Assignments	<input type="checkbox"/> - Only My Assignments
Events			
Date	Event	Due/Completed	Priority
01/24/2014 08:00 AM	Date01+30	Due: 01/24/2014	Medium
01/31/2014 08:00 AM	Filed+30	Due: 01/31/2014	Medium
02/27/2014 08:00 AM	Trial+30	Due: 02/27/2014	Medium
06/06/2014 08:00 AM	Discovery	Due: 06/06/2014	Medium
January 22, 2014 to January 22, 2015			
365 Days			
Click on Event Title to View Details			
★-Added By Outside Counsel			
@-Event Has Assignments			