MITRATECH

TeamConnect® Legal Matter Management 5.0

User and Admin Guide

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

NOTE: Throughout Mitratech product publications, in addition to using full product names where necessary, we also use familiar and shorter terms to increase your ease of reading. You may find the following aliases for our product names:

TeamConnect for TeamConnect Enterprise
Matter Management for TeamConnect Legal Matter Management
TeamConnect Legal for TeamConnect Legal Matter Management
CSM for TeamConnect Collaborati Spend Management
Collaborati Spend Management for TeamConnect Collaborati Spend Management
SOP or SOP Manager for TeamConnect SOP Manager
Legal Hold for TeamConnect Legal Hold
Legal Reports for TeamConnect Legal Reports
Deadlines for TeamConnect Deadlines
AP Link for TeamConnect AP Link
Office Suite for TeamConnect Office Suite
Financial Management for TeamConnect Financial Management
Screen Designer for TeamConnect Screen Designer
Upgrade Toolkit for TeamConnect Upgrade Toolkit

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.

Table of Contents

1 Legal Matter Management User Help

Welcome to the *TeamConnect® Legal Matter Management User Help*.

Matters	Involved Parties
Matter Phases	Advice and Counsel Matters
Dispute and Transaction Matters	Time Entry Tool

1.1 Getting Started

Matters let you organize, compile, and manage the details of an incident or event--from the beginning to its conclusion. Details may include information about the people involved in the incident, all relevant dates, tasks that must be completed, users and specialists assigned to the matter, and all related documents.

The following matter types are available in TeamConnect Legal:

- **Advice and Counsel**—Manage requests for recommendations or other legal advice, whether internal to your organization or relating to specific Dispute or Transaction matters.
- **Disputes**—Track any type of adversarial legal matter, formal litigations, and informal disputes.
- **Transactions**—Manage business law matters. A transaction matter record contains common information applicable to all types of business law matters, from contracts to intellectual property matters, and adds additional information according to the category that applies to the transaction.

Pages Common to all Matters

All matter records have the following pages on which you can view and edit information:

- **General**—View, enter, or edit general information about a matter, such as name and number of the matter, type, description, and its current phase. You may also see additional blocks of fields that are displayed when you assign certain categories to the Dispute matter.
- **Involved/Assignees**—View or assign TeamConnect Legal users to a matter. You can also assign Involved parties to a matter, such as outside counsel. Involved parties can be any contact. For Advice and Counsel matters, this page is called **Assignees** because Advice and Counsel matters do not use Involved parties.
- **Documents**—Manage documents that are related to a matter.
- **Activities**—Manage appointments and tasks that apply to a matter.

Dispute and Transaction Matters

In addition to the pages listed above, Dispute and Transaction matters have the following pages on which you can view and edit information. Advice and Counsel matters do not have these pages.

- Categories
- Budgets
- Cost Centers
- Invoices/Expenses
- Narratives
- Supplemental
- Related Advice
- Related Matters

There are also pages specific to Dispute and Transaction matters. See Working with Matters for more information.

1.2 Working with Matters

You can perform the following tasks when working with matters:

All Matters

- Viewing Matter Records—Open and view the areas and elements on the matter page.
- Creating or Editing Matters—Create a matter using a wizard, manually, or by copying an existing matter.
- Changing Matter Phases—Select the phase that moves the matter along from the beginning to the end of the project, such as Intake when a matter record is started, and ending with Closed when the matter reaches its conclusion.

Advice and Council Matters

- Advice and Counsel Matters—Manage Advice and Counsel matters.

Dispute and Transaction Matters

- Assigning Matters—Manage users who are assigned to matters.
- Managing Invoices and Expenses—Manage the incoming billing for a matter.
- Creating a Matter Expense Record—Manage the expenditures for a matter.
- Creating or Editing Narratives—Enter or edit large amounts of textual details for a matter.
- Managing Supplemental Information—View and edit events and details that can occur during a Dispute, such as allegations, violations, and discovery sanctions.
- Managing Related Advice and Counsel Matters—View, add, or edit Advice and Counsel matters that are related to Dispute or Transaction matters. You can also use this page to create a new Advice and Counsel matter and relate it to a Dispute or Transaction matter.

Dispute Matters Only

- Entering or Editing Dispute Damages—View, enter, or edit information about Dispute damages, such as compensatory, medical, personal injury, property, and punitive damages.
- Entering or Editing Dispute Negotiations—View, enter, or edit Dispute negotiation information, including demand and offer information.
- Managing Dispute Dispositions—View, enter or edit information about awards and the outcome of Dispute dispositions.
- Entering or Editing Dispute Allegations or Violations—Enter or change information about Dispute allegations and violations, including name, type, and description information.
- Entering or Editing Dispute Sanctions—Enter or change Dispute sanction information, including name, type, and description information.
- Creating a Dispute Subpoena—Create a subpoena record that is related to the selected Dispute record.
- Adding a Dispute Jurisdiction—Link a court and a judge to the Dispute record and enter the docket number so that this information is readily available from within the Dispute record.

Transaction Matters Only

- Entering or Editing Transaction Liabilities and Assets—Create or edit Transaction liability and asset information for a Transaction matter.
- Entering or Editing Transaction Provisions—Create or edit provision information for a Transaction matter.
- Entering or Editing Transaction Terms—Create or edit terms for a Transaction matter.

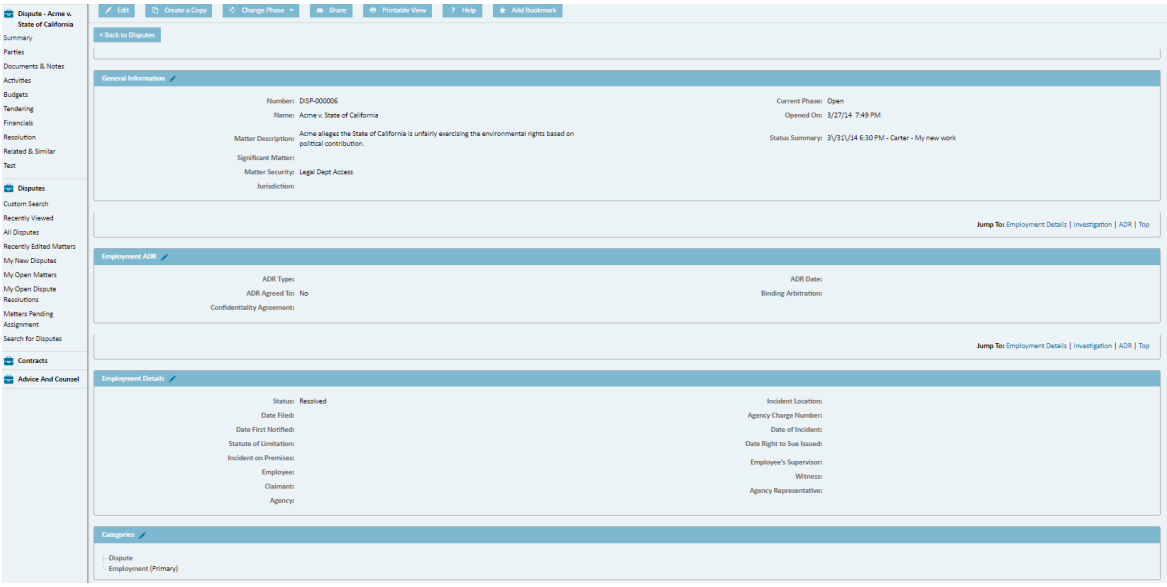
1.3 Viewing Matter Records

You can view matters in a list view, browse matter collections, or search for matters.

To view matters

1. Click the **Legal** tab.
2. Select one of the following options:
   - Click a matter type under the tab bar.
   - Click a matter collection link in the left pane.
3. To open a matter record, click its name in the list view.

You can also search for a specific matter record. See Searching for Specific Records for more information.



Matter General Page

Once you open a record, with the appropriate rights you can use the links in the left pane to add or edit information. See Working with Matters for more information.

For more information about the areas in this view, see Viewing Matter Records for more information.

No Matters Visible in the List View?

The first time that you try to view matters, it may appear that there are no matters available in the list view. This is because the list view defaults to the Recently Viewed collection. Click the **All Matters** collection link in the left pane if you know that there are matters available. The next time that you access projects, the list view defaults to the last collection that you opened.

1.4 Creating or Editing Matters

With the appropriate access rights, you can create and edit matters at any time.

Note: *Before creating a new matter record, first search for records that may already exist in the database. See Searching for Specific Records for more information.*

The following topics apply to creating or editing matters:

- Creating a Matter Using a Wizard—Create a matter using a quick, guided process.
- Creating a Matter Manually—Create a matter starting from a blank matter record.
- Editing a Matter—Make changes to a matter.

1.4.1 Creating a Matter Using a Wizard

A wizard provides a quick, step-by-step way to create a new matter record. The wizard prompts you to enter basic information, such as the name of the matter, people you want to assign to the matter,

outside counsel billing on the matter, and budget information, and then stores the matter in the system.

Each page of the wizard may also have a **Finish** button, which allows you to stop the wizard and saves any information that you entered. Later, you can open the saved matter record and provide additional details and updates.

The wizards for creating matters may prompt you to do the following:

- Select the appropriate matter type
- Enter certain details about the matter, such as a description, important dates, and names of involved parties
- Set the matter security, so that the record can be accessed by the entire legal department or only by the specified user group or the users assigned to it
- Assign the matter to users and specify a role for each assignee
- Select outside counsel
- Create budgets for the matter

A wizard may be one of the options or the only option available to create a new matter.

Wizard Pages in the Left Pane

When you open a wizard, the sequence of steps is also listed in the left pane in the order of the steps in the wizard definition. Each page is displayed with a number and the page title. Only steps that the user already opened are displayed as links so that it is easy to return to a previous step to make changes. The page that is currently open is always highlighted. This makes it easier to view the number of steps in the wizard.

To create a matter using a wizard

1. Click the **Legal** tab.
2. Click the appropriate matter type under the tab bar.
3. Click the **New** drop-down, and then select the appropriate wizard.

   The wizard opens to the first page.
4. Complete all of the required fields, and any additional fields.
5. Click **Next** to continue to the next page, or click the appropriate link in the left pane.

   The next page that opens depends on the pages defined for this matter type and this wizard.

   If a **Finish** button appears on any page, click it if you want to save the matter with only the information that is currently entered. This is useful if you do not have complete matter details or if you only need to generate a matter ID. Once the matter is saved, you can add additional information whenever you receive it.

   If you need to make changes on a previous page of the wizard, click the **Back** button or the appropriate page in the left pane; if you want to cancel the wizard, click **Cancel**.
6. When you get to the end of the wizard, click **Finish**.

The matter is saved in the **Intake** phase and is opened to its **General** page. To change the phase, see Changing Matter Phases.

Once the matter is saved, you can add or edit information at any time. See Working with Matters for more information.

1.4.2 Creating a Matter Manually

Creating a matter manually lets you create a matter starting from a blank matter record.

Note: *Your company may allow you to create a matter record using a wizard only, so the option to create a matter manually may not be available. See Creating a Matter Using a Wizard for more information.*

To create a matter manually

1. Click the **Legal** tab.
2. Click **New**, and then click **New Dispute**, **New Transaction**, or **New Advice and Counsel**.

   The matter record opens to its **General** page.
3. On the **General** page, enter the appropriate data in the available sections, including all required fields. See the Advice and Counsel General Page Field Descriptions and Dispute and Transaction Matter General Page Field Descriptions for more information.
4. In the left pane, click the **Categories** link, and then add the appropriate categories to indicate the nature of the matter. You cannot save this record unless you assign it to a category. See Relating Involved Parties for more information.

   Important: *For certain categories, new blocks of fields may appear on the **General** page. Click the **General** link in the left pane and complete these fields before you save this record.*
5. If necessary, enter or edit the appropriate information on the additional matter pages listed in the left pane. See Working with Matters for more information.
6. Select a save option.

   The matter is saved and set to the **Open** phase. To change the phase, see Changing Matter Phases.

Advice and Counsel General Page Field Descriptions

The tables below contain the default fields for Advice and Counsel matters. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

General Information Section

Field (* = required)	Description
Current Phase	The phase that is currently assigned to this matter. See Changing Matter Phases for more information.
***Name**	The name of this matter. If you are unable to edit this field, matters of this type are named automatically. ***Note:*** *If one of the fields used in the automatic naming sequence is changed, the name of the matter may change. For example, if the **Contact** field is used for naming matters and you select a different contact, the matter name will change when you save the record.* If this field is editable, type a descriptive name according to your organization's standards.
Matter ID	The number assigned to this matter. If you are unable to edit this field, matters of this type are numbered automatically. If this field is editable, type a number according to your organization's standards. ***Note:*** *After you save the record, you may not be able to change this number.*
Opened On	Date and time that the record was opened. These values are set automatically when the matter record is created.

Details Section

Field (* = required)	Description
Action Type	The action that was taken to resolve this matter.
Follow-up Date	The scheduled date on which the follow-up action should be taken.
***Follow-up Needed**	Whether or not this matter needs follow-up action. Options: **Yes** or **No**. If you select **Yes**, you must enter a **Follow-up Date**.

Notes	Details that may pertain to this matter.
Notification Date	The date on which the notification was received.
***Notification Type**	The method that was used to notify the necessary parties, such as fax, email, or phone.
Other Notification Type	A notification type not listed in the **Notification Type** field.
Proactive or Reactive	Whether this matter is proactive or reactive.
Requested By	The contact who requested the matter discussion. Click the search icon to locate the appropriate contact.
***Topic**	The category which most closely describes the type of matter being discussed. Advice and counsel matters do not have categories. Instead, they use topics to categorize the matters. Topics do not provide the show/hide behavior to groups of fields, but they do help with categorizing and searching for matters.

Dispute and Transaction Matter General Page Field Descriptions

The table below contains the default field information for Dispute and Transaction matters. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

General Information Section

Field (* = required)	Description
Current Phase	The current phase of the matter. If this is a new matter, this field is blank until it is saved.
Matter Description	Describes details about the matter.
Matter Security	The name of the security group that has access to this matter.
Media Sensitive	Whether or not this matter is important to the media. Options are **Yes** or **No**. If you select **Yes**, it is recommended that you complete the **Media**

	Statement Prepared field.
Media Statement Prepared	Whether or not a statement has been prepared for the media. Options are **Yes** or **No**.
***Name**	The name of this matter. • If you see **(Auto)** displayed in the **Name** field, projects of this type are named automatically. ***Note:*** *If one of the fields used in the automatic naming sequence is changed, the name of the project may change. For example, if the **Contact** field is used for naming projects and you select a different contact, the matter name will change when you save the record.* • If you do NOT see **(Auto)** displayed in the **Name** field, type a descriptive name according to your organization's standards.
***Number**	The number assigned to this matter. • When you create a new matter, if you see **(Auto)** displayed in the **Number** field, matters of this type are numbered automatically. If you do NOT see **(Auto)** displayed in the **Number** field, type a number according to your organization's standards. ***Note:*** *After you save the record, you may not be able to change this number.*
Opened On	The date and time that the matter was opened. These values are set automatically when **the** project record is created.
Significant Matter	Whether or not this is an important matter. Options are **Yes** or **No**. If you select Yes, you must complete the **Significant Reason** field. If this is a significant matter, it is also listed in your **Significant Matters** collection. See Managing Collections for more information.
Significant Reason	The details of why this is a significant matter. You must complete this field if you selected **Yes** in the **Significant Matter** field.
Status Summary	The current status of the selected matter.

Additional Details on the General Page

Based on the category that you select for this matter, you may see additional sections and fields on the **General** page. These are custom fields that may have required information that you have to

complete before you can save a matter. For more information, see Setting Category Details for more information.

Outside Counsel Section

If outside counsel is defined for this Dispute matter, details are in this section. See Dispute and Transaction Matters for more information.

1.4.3 Editing a Matter

With the appropriate rights, you can add or change matter information on any page associated with a matter.

To edit a matter

1. Click the **Legal** tab.
2. Click a matter type under the tab bar.
3. In the list view, click the edit icon for the matter that you want to edit.

   The matter opens to its **General** page.
4. On the **General** page, make any appropriate changes. See Advice and Counsel General Page Field Descriptions and Dispute and Transaction Matter General Page Field Descriptions for specific field information.
5. In the left pane, click the link of any additional page where you want to make changes. See Working with Matters for more information.
6. Select a save option.

1.5 Using Matter Categories

Categories are items, usually on the **Categories** page, that are added to matter records to indicate the purpose or type of matter. Certain categories are not only indicators of the type of matter, they also add a new block of fields to the matter record when you select the category.

For example, when you add the **Contracts & Agreements** category to a Transaction record, a block of custom fields that are specific to **Contracts & Agreements** is displayed on the **General** tab of the Transaction record. Some of these custom fields may be required and you are unable to save the record until you complete them. You can later search for the matter using the Contracts & Agreements category as part of the search criteria.

If you create a matter using a wizard, you are prompted to select one or more categories. The same categories appear on the **Categories** page after the record is created.

Benefits of Using Categories

Adding the correct categories to records is important for several reasons. When you need to search for matters of a certain type, having the matters properly categorized helps you get accurate search

results and encourage efficient workflow. Since adding categories allows you to display additional fields and enter data, entering data in the correct fields allows you to capture accurate information about a matter, and to run accurate reports across the system.

Some automated processes rely on specific categories. For example, the New Outside Counsel wizard looks for contact records with the **External : Firm** and the **External : Attorney** categories in order to display a list of firms and their attorneys from which to select.

Many categories are further divided into subcategories to identify the specific nature of the matter. For example, for a Dispute matter, some of the subcategories of the **Mergers & Acquisitions** category include **Divestiture**, **Joint Venture**, **Merger**, **Stock Purchase**, and **Stock Sale**.

1.5.1 Assigning Advice and Counsel Categories

You cannot assign a category to Advice and Counsel matters. Instead, the **General** page contains a **Topic** list which contains categories that apply to Advice and Counsel matters. Based on the topic that you select, additional fields may appear in a separate block on the **General** page. This block may contain required fields that you must complete before you can save the matter.

For example, many of the available topics are employment topics. These topics, such as **Disability**, **Harassment**, and **Discrimination**, are grouped together in a hierarchical drop-down list under **Employment**. Once you select a topic, such as Harassment, return to the **General** page to see if any required fields appeared that are related to **Harassment** and must be completed to save the record.

To assign Advice and Counsel categories

1. Search for an Advice and Counsel matter and open it.
2. Click **Edit**.
3. In the **Topic** field, select an item in the drop-down list.

1.5.2 Assigning Dispute and Transaction Categories

Use the **Categories** page for Dispute and Transaction matters to assign the matter to one or more categories.

To assign a dispute or transaction category

1. Click the **Legal** tab.
2. Click **Dispute** or **Transaction** under the tab bar.
3. In the left pane, click the **Categories** link.
4. Select the appropriate category in the **Categories** block. Set the Primary Category.
5. Select a save option.

Dispute-related Categories

The Dispute category has the following default sub-categories:

- Bankruptcy
- Contracts
- Employment
- Environmental
- General Liability/Claim
- Intellectual Property
- Lawsuit
- Regulatory and Compliance
- Subpoena

Transaction-related Categories

The Transaction category has the following default sub-categories:

- Contracts & Agreements
- Intellectual Property
- Mergers & Acquisitions
- Real Estate

1.6 Assigning Matters

Assignees are users who also have contact records. Assignees generally work for your company and are available to be assigned to specific roles in a matter. You can add one or more assignees to a matter and each assignee can have a different role in a matter. There is a default set of assignees and roles. You may see additional assignees and roles that are provided based on your company's needs.

One active assignee is set as the main assignee and is in charge of the overall progress of the matter. The rest of the assignees are responsible for certain tasks that move the matter forward to completion.

You can perform the following tasks to manage assignees for a matter:

- Viewing Users Assigned to Matters—Add one or more users to the selected matter.
- Adding Assignees to Matters—Assign users to a matter.
- Changing the Primary Assignee for a Matter—Select a new matter leader.
- Unassigning or Reassigning Assignees—Temporarily remove a user from a matter or return a user to a matter.
- Removing Assignees from a Matter—Permanently remove a user from a matter.

1.6.1 Viewing Users Assigned to Matters

Use the **Parties** page to view a list of the users who are currently assigned to the matter and the assignment history, if there are any changes.

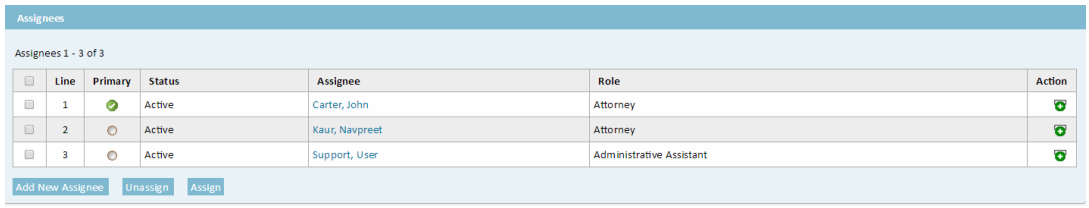
To view users assigned to a matter

1. Search for a matter and open it.
2. In the left pane, click the **Involved/Assignees** link.

   If you are working with Advice and Counsel matters, this link is named **Assignees**.
3. Click **Edit**.

   The page opens in edit mode.

   In the **Assignees** section, you can view the status, role, date of assignment, and the date on which the user was no longer assigned to the matter.



Assignees List View

1.6.2 Adding Assignees to Matters

Use the **Involved/Assignees** page in the left pane to add assignees and their roles to a matter. Roles are the responsibility that each assignee has in a matter, such as attorney or accountant.

Note: *If you are working with Advice and Counsel matters, the link in the left pane and the page name is* ***Assignees****.*

Matter Management provides the following default assignee roles in the Roles drop-down list:

- Administrative Assistant
- Associate General Counsel
- Attorney
- Invoice Approver
- Paralegal

You may see additional roles that are provided based on your company's needs.

To add an assignee to a matter

1. Search for a matter and open it.

2. In the left pane, click the **Involved/Assignees** link.
3. Click **Edit**.

   The page opens in edit mode.
4. In the **Assignees** section, select one or both of the following options:
   - If there are no current assignees, select the appropriate user name in the **Assignee** drop-down list, and then select an option in the **Role** drop-down list.

Assignees Sections with No Current Assignees

   - To add an additional assignee, click **Add New Assignee**, select the appropriate user name in the **Assignee** drop-down list, and then select an option in the **Role** drop-down list.

Assignees Section - Adding an Additional User

   A user can be assigned to the same matter more than once if each assigned role is different.
5. If there is more than one user assigned to this matter, in the **Primary** column, click the radio button to select a main assignee. By default, the first assignee is designated as Primary.
6. Select a save option.

Notifying Matter Assignees

If email notification is enabled, each of the users assigned to the matter receives an automatically generated message to inform them of their assignment. If you assign yourself to a matter, you will not receive an email notification. You only receive email notifications if you are assigned to a matter by someone else. See Setting Up Email Notifications.

Assignees Page Field Descriptions

The table below contains the default fields for the **Assignees** page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Assignees Page Fields

Field or Control	Description
Action	Add or remove an assignee for this matter. • Click + to add a new row • Click - to remove a user
Assignee	The name of the user who is assigned to this matter.
Primary	The designated matter leader. ***Note:*** *Only assignees with the **Active** status may be set as the main assignee.*
Reassign button	Adds a previously assigned user to the matter.
Remove button	Permanently delete an assignee from this matter.
Role	The responsibility of a user for this matter, for example, Attorney or Accountant.
Status	The current status of each assignee in the list. Options are **Active** or **Inactive**.
Unassign button	Inactivates the selected users assignment status.

1.6.3 Changing the Primary Assignee for a Matter

Use the **Involved/Assignees** page to assign or change the designated team leader for a matter. You can change the primary assignee at any time.

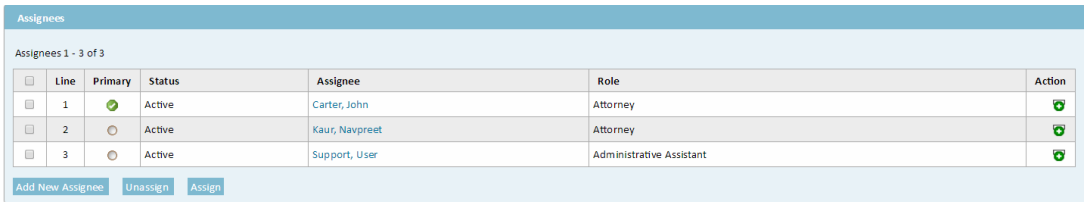
Note: *If you are working with Advice and Counsel matters, the link in the left pane and the page name is **Assignees**.*

To change the primary assignee in a matter

1. Search for a matter and open it.
2. In the left pane, click the **Involved/Assignees** link.

3. Click **Edit**.

   The page opens in edit mode.

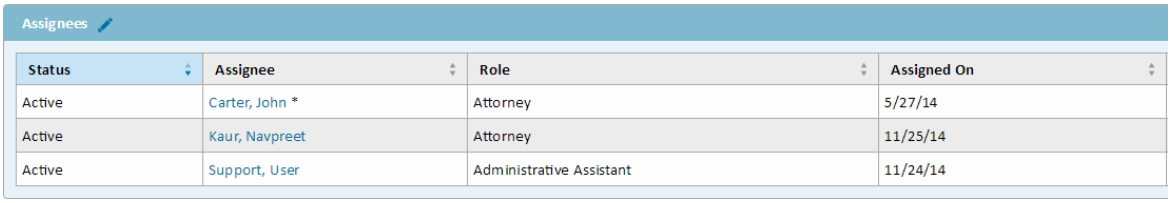


Assignees Section with Primary Designation

4. In the **Primary** column, select the radio button for the user that you want to set as the main assignee.

5. Select a save option.

On the **Involved/Assignees** page for a matter, the primary assignee is indicated by an asterisk.



Matters Assignees Page - Read-only Mode

1.6.4 Unassigning or Reassigning Assignees

Use the **Assignees** page (on Advice and Counsel) or the **Involved/Assignees** page to temporarily remove a user from a matter, or to reassign a user to a matter. There are certain situations when you might need to end or temporarily suspend an assignee's participation in a matter. For example, if the assignee's workload needs to be adjusted, you may move the assigned matters to a different user.

Note: *If you are working with Advice and Counsel matters, the link in the left pane and the page name is Assignees.*

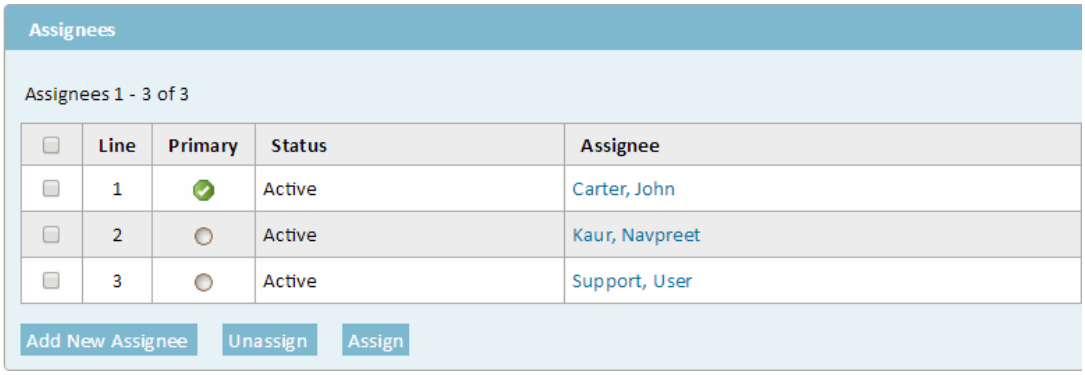
Unassigning assignees instead of deleting them is useful so that you have a record of the matter assignment history.

To unassign or reassign users

1. Search for a matter and open it.

2. Click **Edit**.

   The page opens in edit mode.



Assignees Section in Edit Mode

3. Select one of the following options:
   - To temporarily remove an active user from a matter, select the appropriate check boxes, and then click **Unassign**. The status changes to **Inactive**.
   - To reactivate inactive users, select the appropriate check boxes, and then click **Reassign**. The status changes to **Active**.
4. Select a save option.

1.6.5 Removing Assignees from a Matter

Use the **Involved/Assignees** page to completely remove a user from a matter.

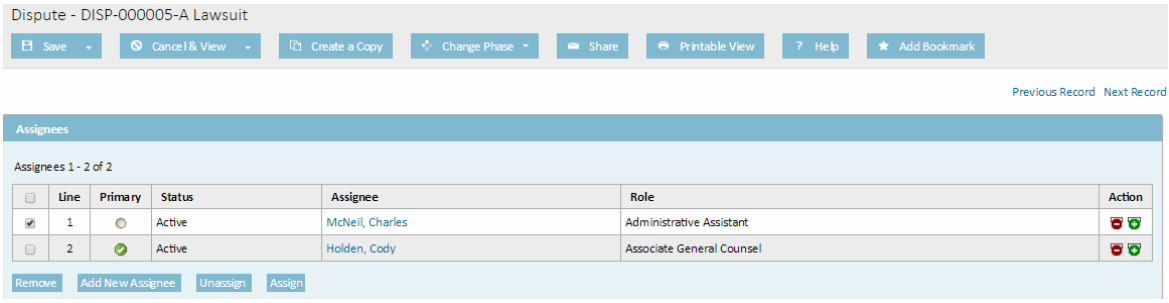
Note: *If you are working with Advice and Counsel matters, the link in the left pane and the page name is* ***Assignees****.*

To remove a user from a matter

1. Search for a matter and open it.
2. In the left pane, click the **Involved/Assignees** link.
3. Click **Edit**.

   The page opens in edit mode.
4. Select the check box next to the name of the assignees that you want to remove from the matter. You can select more than one check box.
5. Click **Remove**.

   The selected user is deleted from the **Assignees** page, but not from TeamConnect Legal.
6. Select a save option.



Removing an Assignee from a Matter

1.7 Managing Involved Parties

Use the **Parties** page of a matter to manage the people or organizations that are involved in a matter, such as opposing counsel or jurisdictions.

Involved Parties are persons or companies that are involved in a matter and have roles such as witness, plaintiff, outside counsel, or opposing party. All roles can be selected or edited on the **Involved Parties** section tab.

By default, involved party records have the following additional pages:

- **Party Name**—Displays general information about the involved party and includes contact information, a link to the contact record, involvement dates, notes, and the involved party's role in the matter.
- **Role**—Displays the involved party's role in the matter.
- **Date Assigned**—Displays the date signifying when this person was assigned to the matter.
- **Active**—Displays whether this person's status is set to "Active".
- **Notes**—Displays additional notes about the involved party or matter.
- **Phone Number**—Displays the party's phone number.

Involved party records can only be created and viewed from within their related matters.

You can perform the following tasks to manage involved parties for a matter:

- Adding Involved Parties—Add or change the people or companies who are involved in a matter.
- Changing the Status of an Involved Party—Change the status of an involved party to Active or Inactive.
- Changing an Involved Party Role—Add or change the role of people or companies who are involved in a matter. You can also assign and change a default role.
- Relating Involved Parties—Define the relationship between involved parties.

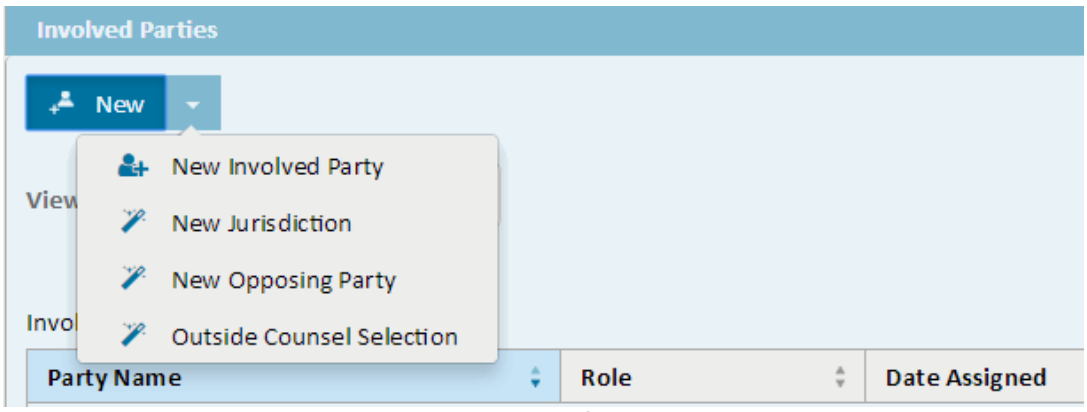
1.7.1 Adding Involved Parties

Use the Involved/Assignees **Summary** page to add contacts who are involved in a matter.

To add an involved party

1. Search for a matter and open it.
2. In the left pane, click the **Involved/Assignees** link.

   The **Involved/Assignees** page opens.
3. Click **Edit**.
4. In the Involved Parties section, click **New Involved Party**.



Involved Party Section

5. The New Involved Party Wizard opens to the first page.
6. Complete the following fields:
   - For the **Contact** field, select one of the following options:
     - If you know the contact name, enter the first few letters of the name in the Contact box. If one or more names appear in a drop-down list, select the appropriate name.
     - In the **Contact** field, click the search icon. On the search page, enter the appropriate search criteria, and then click **Search**. If you want to select an Outside Counsel firm for budgeting, the contact must have the **External > Law Firm** category. When the contact list opens, select the appropriate contact name, and then click **OK**.

       You are returned to the first screen and the selected name appears in the **Contact** box.
   - In the **Default Role** drop-down list, select the role that applies to this involved party. If you want to select an **Outside Counsel Firm** for budgeting, select Outside Counsel Firm as the role for matter type Dispute or Transaction.
   - Uncheck the **Active** box if you do not want this involved party to be active at this time. Check this box if you are ready to activate this involved party.
   - In the **Notes** section, enter any information that is pertinent to this involved party.

7. Click **Save & Close**.

   For all other involved parties, this step will be skipped. The new involved party is added to the matter.

   Tip: *If you cannot locate the appropriate contact, you may have to create it. Click* ***New****, select an option, and then follow the instructions to create a new contact. See "Creating or Editing Contacts" on page 131(link). When you are done, use the* ***Recent Items*** *drop-down list on the main page to return to the original matter.*

8. Click **Save & Close**.

Involved Party General Page Field Descriptions

The table below contains the default fields for the Involved Party **General** page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Involved Party General Page Fields

Field or control (* = required)	Description
***Contact**	The name of the contact that you want to add to this record. After the record is saved, the contact name is always displayed as a hyperlink to the contact's record.
Default Role	The role that usually applies to a contact in a matter, for example, Attorney or General Counsel. The role that you select is automatically added to the list and set as the default on the **Roles** page when you save the record. You can add a contact to the same matter multiple times as long as each entry has a different role.
Is Active	The current status of the Involved party. Options are **Active** or **Inactive**.
Inactive Date	The ending date of this party's involvement in a matter.
Involvement Date	The beginning date of this party's involvement in a matter. By default, this is the date that the involved party is added to this Dispute matter, but you can change it at any time.
Notes	Notes that may apply to this involved party.

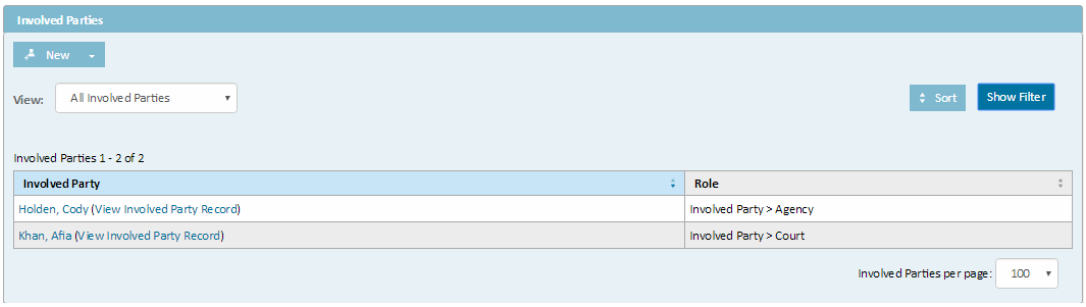
1.7.2 Editing Involved Parties

Use the Involved/Assignees **General** page to edit involved party records.

To edit an involved party record

1. Search for a matter and open it.
2. In the left pane, click the **Involved/Assignees** link.
3. If necessary, in the Involved Parties section, in the **View** drop-down box, select **All Involved Parties**.

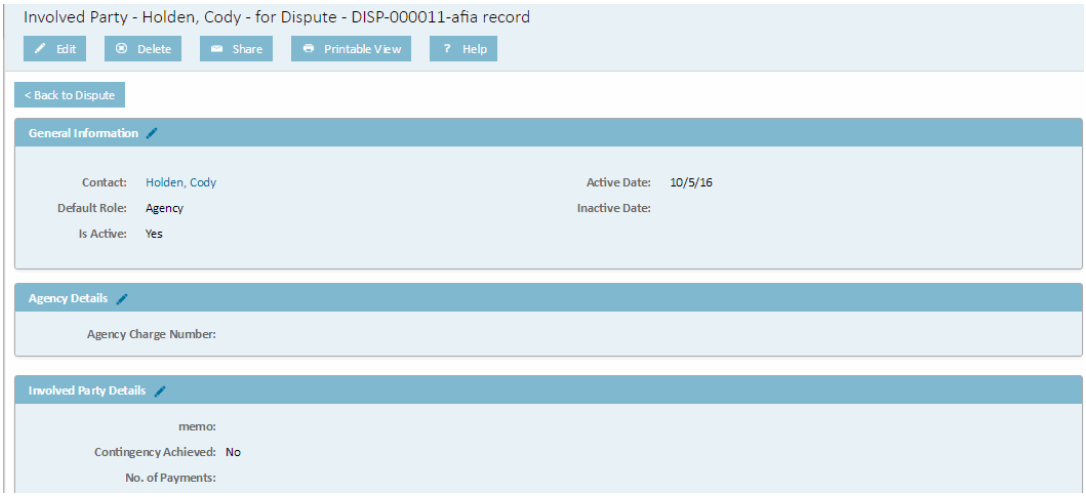
   A list of active and inactive involved parties is displayed.



Involved/Assignees Page - Involved Parties Section

4. Click the **View Involved Party** link next to the appropriate contact.

   The involved party record opens to the **General** page.



Involved Party General Page

5. Click **Edit**, and then edit the appropriate information.
6. If necessary, click a link in the left pane to edit additional information. See Relating Involved Parties for more information.
7. Select a save option.

1.7.3 Changing the Status of an Involved Party

Use the **General** page to change the status of an involved party. The options are **Active** or **Inactive**.

To change the status of an Involved party

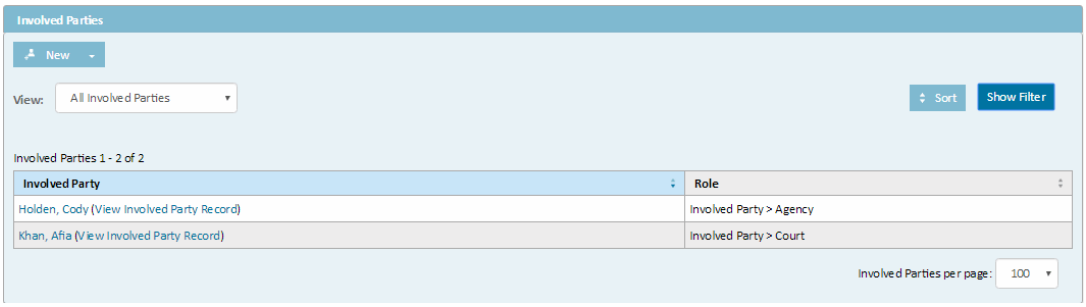
1. Search for a matter and open it.
2. In the left pane, click the **Involved/Assignees** link.
3. If necessary, in the **View** drop-down list, select **All Involved Parties**.
4. Click **Search**.
5. Click **View Involved Party Record** next to the appropriate contact.
6. Click **Edit**.
7. In the **Status** drop-down list, select the appropriate status.
8. Select a save option.

Evaluating Outside Counsel

TeamConnect Legal allows you to evaluate outside counsel and use this information to track their performance over time. Each time outside counsel is involved in a matter, you must complete an evaluation before you close the matter. This evaluation is incorporated into the outside counsel's overall score. You perform the evaluation in the involved party record of the outside counsel. The score can be viewed in the outside counsel's contact record.

To evaluate outside counsel

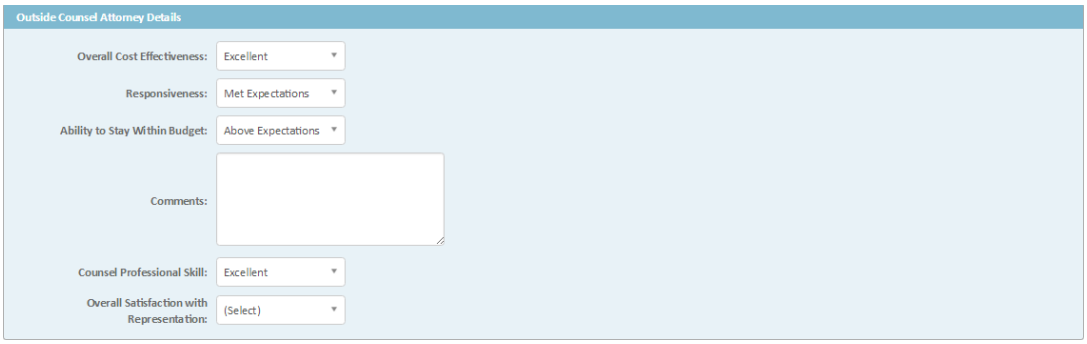
1. Search for and open a matter in which an outside counsel attorney is selected as an involved party.
2. In the left pane, click the **Involved/Assignees** link.
3. In the **Involved Parties** section, click the **View Outside Counsel** link next to the name of the outside counsel that you want to evaluate. The involved party record of that individual opens.



Disputes General Page - Involved Parties Section

4. Click **Edit**.

5. In the **Involved Party Outside Counsel Evaluation** section, select a rating for each item of the evaluation criteria.



Involved Parties Outside Counsel Evaluation Section

If the **Outside Counsel Evaluation/Outside Counsel Attorney details** section of contact records is not displayed, you may not have access rights to this feature. Likewise, this field will only be visible if the Involved Party's role is not an outside counsel role. Contact your TeamConnect Legal administrator if you need to evaluate outside counsel.

6. In the **Comments** section, enter additional details if necessary.
7. Select a save option.

The rating you select for **Overall satisfaction with representation** is used to calculate the overall performance of the counsel. This score is displayed on the **Categories** page of the selected counsel's contact record.

1.7.4 Changing an Involved Party Role

Use the involved party **Roles** page to change an involved party's role in a matter.

Typically, companies organize their Involved party contacts by categories or roles. Categories may be broad, or may include subcategories. Contacts may be involved in a matter in a number of roles such as respondent, claimant, or witness. One of the roles is always set as the default role for the selected contact.

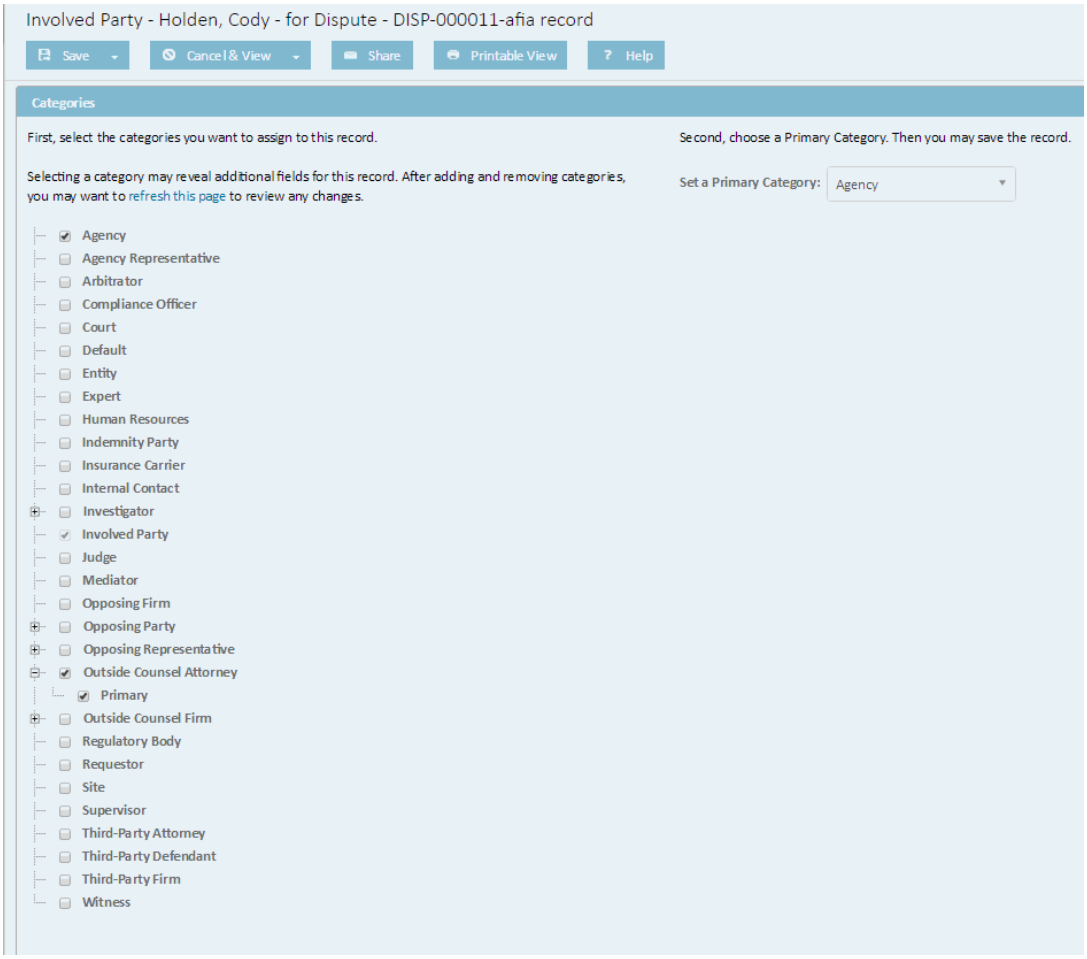
To change an involved party role

1. Search for a matter and open it.
2. In the left pane, click the **Involved/Assignees** link.

   The **Involved/Assignees** page opens.
3. If necessary, in the **View** drop-down list, select **All Involved Parties**.
4. Click **Search**.
5. Click **View Involved Party Record** next to the appropriate contact.

   The involved party **General** page opens.
6. Click **Edit**.

The **General** page opens in edit mode. Navigate to the **Roles** page in the left pane.



Involved Parties Roles Page

7. On the **Default Role** drop-down list, select the new role for this involved party.
8. Select a save option.

1.8 Changing Matter Phases

Use the **Change Phase** button in the list view to change the phase of a matter. Each matter record goes through specific phases that move a matter along in its life cycle - from the beginning to the end of the matter.

The following default phases are provided:

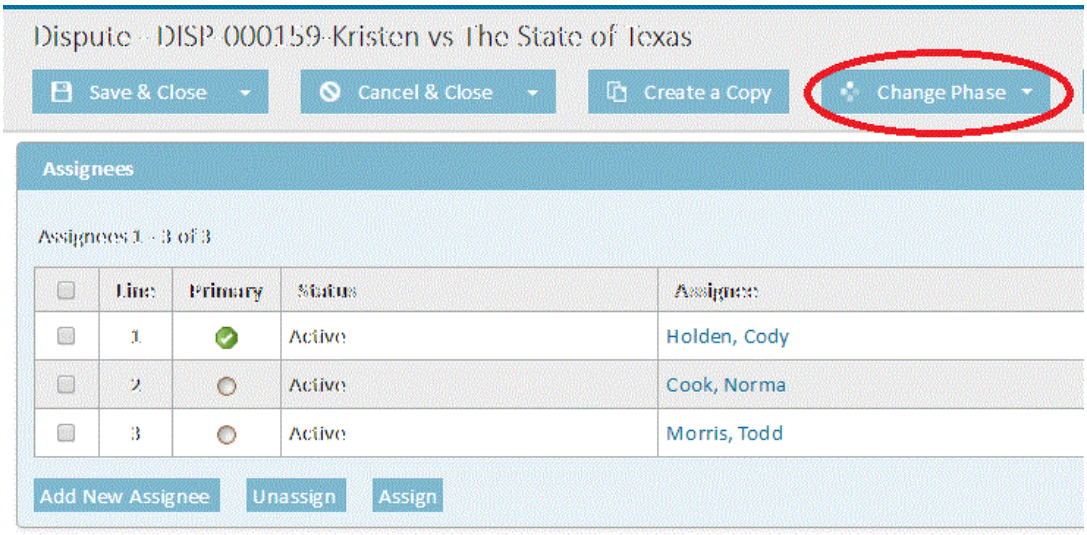
- **Intake**—Assigned to all matters when they are first created.
- **Open**—Indicates that work has begun on this matter.
- **Closed**—Indicates that the matter has reached a resolution. When selecting this phase, you may be prompted to enter specific information, such as an evaluation of outside counsel.
- **Reopen**—Opens a closed matter.

You may see additional phases that are provided based on your company's needs.

Each time you select a new phase, the **Change Phase** drop-down list displays the next phase in the life cycle. You cannot skip a required phase or go back to a previous phase. For example, you cannot select **Reopen** after the **Open** phase; the current phase must be **Closed** to select **Re-Open**.

To change the phase of a matter

1. Search for a matter and open it.
2. Click **Change Phase**, and then select a phase from the drop-down list.



Disputes Change Phase Button

The phase is changed and the new phase is automatically displayed in the **Current Phase** field on the **General** page of the matter record.

1.9 Advice and Counsel Matters

Advice and counsel matters let you to enter and track recommendations, questions, or other legal advice. Advice and counsel matters cover a wide variety of legal content, but contain few data entry fields. You can create and store a knowledge bank of previous research, which allows your legal staff to re-use information to shorten response times and increase efficiency.

If necessary, an Advice and Counsel matter record may be created when advice is given about an existing Dispute or Transaction matter, and then linked to the related record for reference.

Advice and Counsel Pages

Advice and Counsel matters have the following pages on which you can view and edit information:

- **General**—View, enter and edit general information about the matter, such as its name, action type, whether or not follow-up is needed, notes, and access information. There is also a **Topic**

field that lets you select the category that applies to this matter. See Creating or Editing Matters for more information.

- **Assignees**—View or edit the users who are assigned to the matter and their roles in the matter. See Assigning Matters for more information.
- **Documents**—View or add documents that apply to the selected matter. See Documents for more information.
- **Activities**—Create or edit appointments and tasks for a selected Advice and Counsel matter. See Scheduling Matter Appointments or Tasks for more information.
- **Related Advice**—View, add, or edit Advice and Counsel matters that are related to Dispute or transaction matters. If necessary, you can also use this page to create a new Advice and Counsel matter and relate it to a Dispute or Transaction matter. See Managing Related Advice and Counsel Matters for more information.

Categories for Advice and Counsel Matters

You cannot assign a category to Advice and Counsel matters. Instead, the **General** page contains a **Topic** list that contains categories that apply to Advice and Counsel matters. Based on the topic that you select, additional fields may appear in a separate block on the **General** page. This block may contain required fields that you must complete before you can save the matter.

For example, many of the available topics are employment topics. These topics, such as **Disability**, **Harassment**, and **Discrimination**, are grouped together in a hierarchical drop-down list under **Employment**. Once you select a topic, such as **Harassment**, return to the **General** page to see if any required fields appeared that are related to Harassment and must be completed to save the record.

See Dispute and Transaction Matters for more information.

1.10 Dispute and Transaction Matters

TeamConnect Legal provides two formal types of matters:

- **Dispute Matters**—Track adversarial legal matters, formal litigations, and informal disputes.

  To meet the needs of various types of disputes, the Dispute record is organized to include common information that is applicable to all types of disputes, and then adds additional information when you add categories to the dispute record.

- **Transaction Matters**—Manage general business law matters. A transaction matter enables the transactional practice group to manage a matter from its inception through its life cycle, with one matter record capturing and reusing pertinent information.

  To meet the needs of various types of transactions, the transaction matter record contains common information applicable to all types of business law matters, from contracts to intellectual property matters, and adds additional information according to the category that applies to the transaction. See Relating Involved Parties for more information.

Dispute and Transaction matters have additional pages on which you can enter related matter information. There are some pages and wizards that are exclusive to Dispute matters only and some are common to both matter types.

Dispute and Transaction Information

The following pages are common to both Dispute and Transaction matters. These pages have the same format, but the type of information entered may vary based on the matter type.

- **Activities**—Manage appointments and tasks that apply to this matter. See Scheduling Matter Appointments or Tasks for more information.
- **Narratives**—Enter and review notes that pertain to a matter. See Creating or Editing Narratives for more information.
- **Related Advice**—View, add, and modify Advice and Counsel matters that are related to a Dispute or Transaction.
- **Related Matters**—View or set the relationships that the selected matter may have with other Dispute or transaction matters.
- **Supplemental**—View and edit events and details that can occur during a matter, such as allegations, violations, and discovery sanctions. See Managing Supplemental Information for more information.

Dispute-specific Information

The following pages let you enter additional information related to Dispute matters:

- **Damages Summary**—View and enter damage summaries, including the type of damages and the damage amount. See Entering or Editing Dispute Damages for more information.
- **Disposition**—View or enter award information for a dispute, such as the type and amount of the award, and to whom the award was paid. You can also view information about Dispute dispositions. See Managing Dispute Dispositions for more information.
- **Negotiations**—View or enter negotiation details, including the demand amount and the offer amount. See Entering or Editing Dispute Negotiations for more information.
- **Supplemental**—View and edit events and details that can occur during a dispute, such as allegations, violations, and discovery sanctions. See Managing Supplemental Information for more information.

Additionally, Dispute matters provide the following wizards:

- **Create a Subpoena**—Create a subpoena record that is related to the selected Dispute record. You can create subpoena's only for Dispute records that are assigned to the **Subpoena** category and you cannot add any other categories to this record. See Creating a Dispute Subpoena for more information.
- **New Jurisdiction**—Link a court and a judge to the Dispute record and enter the docket number so that this information is readily available from within the dispute. To access the jurisdiction wizard, the **Lawsuit** category must be assigned to the Dispute matter. See Adding a Dispute Jurisdiction for more information.
- **Opposing Party**—Link opposing parties and their representatives to the Dispute record so that this information is readily available from within the dispute. To access the wizard, the Dispute matter must be assigned to the **General Liability/Claim** or **Lawsuit** category. See Adding a Dispute Opposing Party for more information.

1.10.1 Scheduling Matter Appointments or Tasks

Use the **Activities** page to associate a task or appointment with a matter.

When you schedule an appointment or task, and associate it with a specific matter, the activity appears on your home page when it becomes due in the near future.

You can perform the following tasks on the **Activities** page:

- Creating or Editing Matter Appointments—Create or edit appointments that are related to the selected dispute matter.
- Creating or Editing Tasks—Create or edit tasks that are related to a specific dispute matter, including tasks that are also billable time items.

1.10.1.1 Creating or Editing Matter Appointments

Use the **Appointments** section on the **Activities** page to schedule appointments and meetings that are related to a specific matter.

When you create an appointment, the matter record name is automatically displayed in the **Matter** field of the appointment record.

To create or edit an appointment

1. Search for a matter and open it.
2. In the left pane, click the **Activities** link.

   The **Activities** page opens.
3. In the **Appointment** section, select one of the following options:
   - To create a new appointment, click **New**.
   - To edit an existing appointment, click the name of the appointment in the **Subject** column, and then click **Edit**.

     The appointment record opens to the **General** page.
4. Enter or edit the name of the meeting, location, and time of the meeting. You can also use the links in the left pane to add resources, attendees, and specify the category for this meeting. See Creating or Editing Appointments for more information.
5. Select a save option.

1.10.1.2 Creating or Editing Tasks

Use the **Tasks** section of the **Activities** page to designate the users and assignments that are needed to complete a project. You can change task assignments at any time and also assign tasks to yourself.

If necessary, you can also add information for tasks that are also billable time items that need to be tracked by rate on an hourly basis.

To create or edit a task for a matter

1. Search for a matter and open it.
2. In the left pane, click the **Activities** link.
3. Select one of the following options:
   - To create a new task, click **New**. If you are creating the task from a project record, the project automatically displays in the **Project** field.
   - To edit an existing task, click the name of the task in the **Subject** column, and then click **Edit**.

     The task record screen opens to the **General** page.
4. Enter or edit the appropriate information in the **Task Information** section and, if necessary, the **Billing Information** section. See Creating or Editing Tasks for more information.
5. Select a save option.

To post this task, see Posting Tasks.

1.10.1.3 Relating Involved Parties

Use the **Relations** page on an involved party to define the relationships between contacts who are involved in the same matter, such as boss-to-employee or attorney-to-client. An involved party may have several different relationships with other contacts and more than one relationship with the same contact.

After you create a relationship between contacts in one record, the related contact's **Relations** page is automatically updated with the same information. See Working with Related Records for more information.

1.10.2 Managing Invoices and Expenses

Use the **Financials** page to manage invoices and expenses for a matter.

You can perform the following tasks on the Invoices/Expenses page:

- Using Matter Invoices—Access invoices and contacts associated with a matter record.
- Creating a Matter Expense Record—Create an expense record that is associated with the selected matter.
- Editing a Matter Expense Record—Edit an expense record that is associated with a selected matter.

Invoices can be posted against accounts and matters according to the posting criteria that you set for an account.

1.10.2.1 Using Matter Invoices

Use the **Financials** page to access invoices and contacts that are related to a matter.

To view matter invoices

1. Search for a matter and open it.
2. In the left pane, click the **Financials** link.

   The **General** page opens.
3. In the **Invoices** section, select one or more of the following options:
   - To access the related invoice, in the **Number** column, click the appropriate invoice number. The invoice opens to its **General** page.
   - To access the contact record associated with this invoice, in the **Vendor** column, click the appropriate link. The contact record opens to its **General** page.

   For information about the fields in the **Invoices** section, see the Invoices Section Fields table.

Invoices Section Field Descriptions

The table below contains the default fields for the **Invoices** section on the **Financials** page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Invoices Section Fields

Field or Control	Description
Invoice Number	The number assigned to this invoice. You can click this link to access the original invoice.
Type	The type of invoice. In addition to the typical **Standard** invoice, the following options are available: • **Credit Note**—A legal instrument that corrects a Non-US Tax invoice. • **Accrual**—An estimate of an upcoming bill.
Vendor	The name of the contact who is billing for this service. You can click on this link to access the vendor's contact record.
Status	The current status of the invoice.
Total Amount	The total of all line items on this invoice. Click the link in the Invoice Number column to view the line items on this invoice.

1.10.2.2 Creating a Matter Expense Record

Use the **Invoices/Expenses** page to view, create and edit expense and matter records.

Expenses are the internal costs of doing business at your organization. Typically, these are the costs of the merchandise bought and the costs of the services received.

For example, when you purchase office supplies, or spend money on transportation, or meals while conducting your business, you can:

- Post expenses against the respective accounts
- Track expenses by certain matters and by specific vendors

Expenses can be matter-specific, meaning that they are associated with a particular matter, or global, meaning that they are not associated with matters.

Expenses that are assigned to the Matter Cost:Internal Expenses category can be posted against the Internal Expenses account record, which is created automatically for each matter record. If your organization budgets according to other types of expenses, you will need to know what category to use in order to post expenses to the correct account.

To create an expense record

1. Search for a matter and open it.
2. In the left pane, click the **Financials** link.

   The **Financials** page opens.
3. In the **Expenses** section, click the **New Expense** button.

   The **General** page opens.
4. In the **Expense Information** column, complete the following options:
   - In the **Description** field, enter the description that applies to this expense.
   - In the **Expense Date** field, leave the default date, or use the calendar icon to select a different date.
   - (optional) In the **Category** drop-down list, select the appropriate category.
   - (optional) In the **Contact** field, type the first few letters of the contact name, or click the search icon to search for the appropriate contact.
5. (optional) In the **Billing Information** section, complete the following fields:
   - In the **Unit Price** field, enter the unit price that applies to this expense.
   - In the **Quantity** field, enter the number of units that apply to this expense.

   For information about the fields in the Expenses section, see Expenses Fields.
6. In the **Notes** section, enter any additional information that applies to this expense.
7. Select a save option.

Expenses Section Field Descriptions

The table below contains the default fields for the **Expenses** section on the **Invoices/Expenses** page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Expenses Fields

Field or Control	Description
***Expense Date**	The date on which the expense is created.
Description	A description of the expense.
Category	The category that is applied to this expense.
Project	The project or matter to which this expense is related.
Status	The current status of this expense.
Total Amount	The cost incurred for this expense.

1.10.2.3 Editing a Matter Expense Record

To edit an expense record

1. Search for a matter and open it.
2. In the left pane, click the **Financials** link.

   The **Financials** page opens.
3. In the **Expenses** section, in the **Description** column, click the link of the expense that you want to edit.

   The expense opens to the **General** page.
4. Click **Edit**.
5. Edit the appropriate fields. See Expenses Fields for more information.
6. Select a save option.

1.10.3 Creating or Editing Narratives

Use the **Documents & Notes** page to view, enter, or edit matter notes in a matter record.

Narratives are history records whose default category is **Matter Narrative**. Each narrative provides the date and time of the narrative, and the name of the user who entered the information.

Narratives are intended to capture large amounts of text, but should not take the place of information that you can enter in a specific field. For example, the details of a negotiation should be entered on the **Negotiations** page rather than in a narrative.

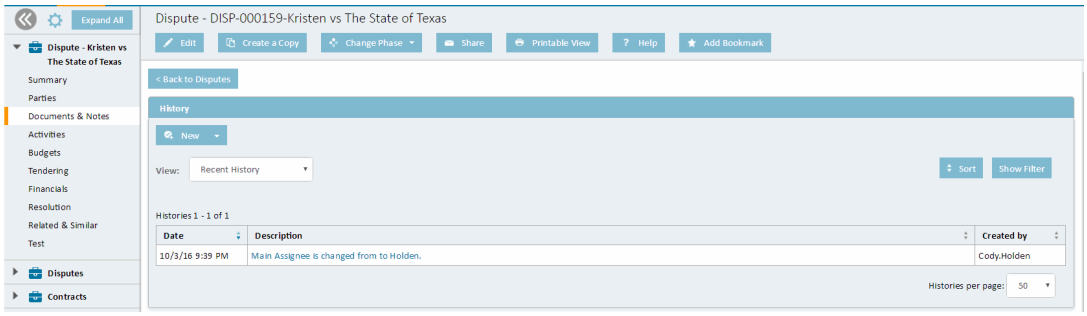
You can also record statements about the matter status. Matter status records are history records whose default category is **Matter Status**. You can view the description of the latest matter status in the **Status Summary** field on the on the Dispute **General** page.

Each Narrative record also has a **Categories**, **Security**, and **Workflow** page where you can enter additional information related to this narrative history record.

To create or edit a narrative

1. Search for a matter and open it.
2. In the left pane, click the **Documents & Notes** link.

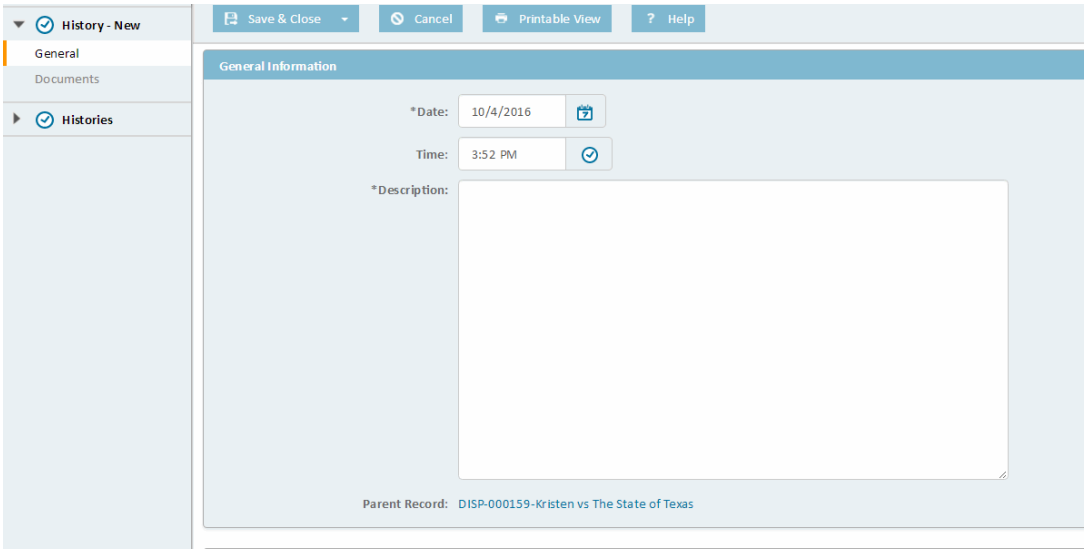
   The **History** page opens.



Disputes Narratives Page

3. Select one of the following options:
   - To create a new narrative (history) record, click **New**.
   - To edit an existing narrative (history) record, click **Edit**.

   The record opens to its **General** page.



History General Page

4. Complete the following information:
   - In the **Date** field, click the calendar, and then select the appropriate date. The current date is the default. This is a required field.
   - In the **Time** field, select a time from the drop-down list. The current time is the default.
   - In the **Description** box, enter the appropriate details. This is a required field.
5. If necessary, click a link in the left pane to enter additional information for this narrative record. See Dispute and Transaction Matters for more information.
6. Select a save option.

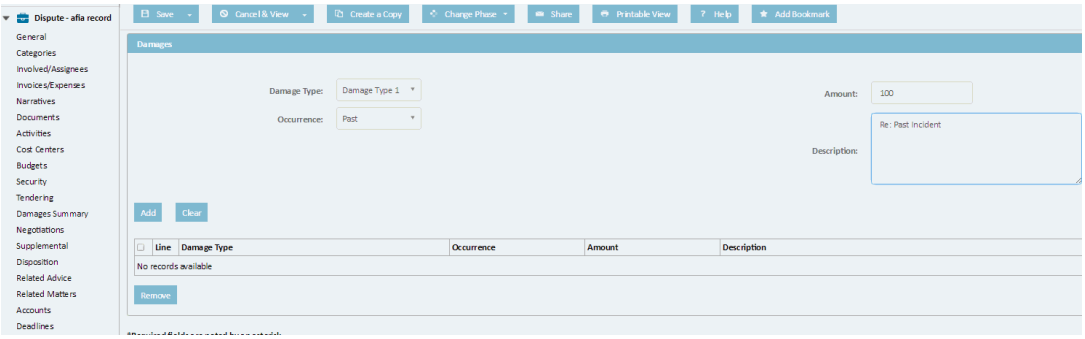
1.10.4 Entering or Editing Dispute Damages

Use the **Damages Summary** page to view, enter, or edit information about Dispute damages, including compensatory, medical, and punitive damages.

To enter or edit dispute damages

1. Search for a Dispute matter and open it.
2. In the left pane, click the **Damages Summary** link.

   The **Damages Page** opens.



Disputes Damages Summary Page

3. In the **Damage Type** field, enter or edit the type of damages that apply to this dispute.
4. In the **Occurrence** drop-down list, select or change the option that indicates when these damages happened. Options are **Future** or **Past**.
5. In the **Amount** field, enter or edit the total amount of the damages.
6. In the **Description** field, enter or edit additional descriptive information if necessary.
7. Click **Add**.
8. If you need to enter additional damages entries, repeat steps 3 through 6.
9. Select a save option.

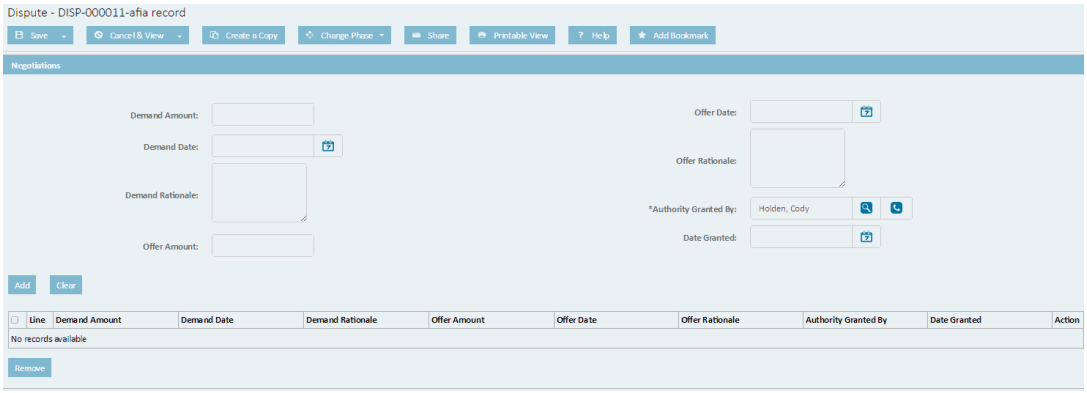
1.10.5 Entering or Editing Dispute Negotiations

Use the **Negotiations** page to view, enter, or edit dispute negotiation information, including demand and offer information.

To enter or edit dispute negotiations

1. Search for a Dispute matter and open it.
2. In the left pane, click the **Negotiations** link.

   The **Negotiations** page opens.



Disputes Negotiations Page

3. Enter or edit information in the following fields:
   - **Demand Amount**
   - **Demand Date**
   - **Demand Rationale**
   - **Offer Amount**
   - **Offer Date**
   - **Offer Rationale**
   - ***Authority Granted By** (required field)
   - **Date Granted**
4. Click **Add**.
5. If you need to add negotiation information, repeat steps 3 and 4.
6. Select a save option.

1.10.6 Managing Supplemental Information

Use the **Supplemental** page for a Dispute or Transaction matter to enter or edit information that needs to be tracked, such as Dispute sanctions or Transaction liabilities or assets.

Dispute Supplemental Information

You can perform the following tasks on the Dispute **Supplemental** page:

- Entering or Editing Dispute Allegations or Violations—Enter or change information about allegations and violations, including name, type, and description information.
- Entering or Editing Dispute Sanctions—Enter or change sanction information, including name, type, and description information.

Transaction Supplemental Information

You can perform the following default tasks on the Transaction **Supplemental** page:

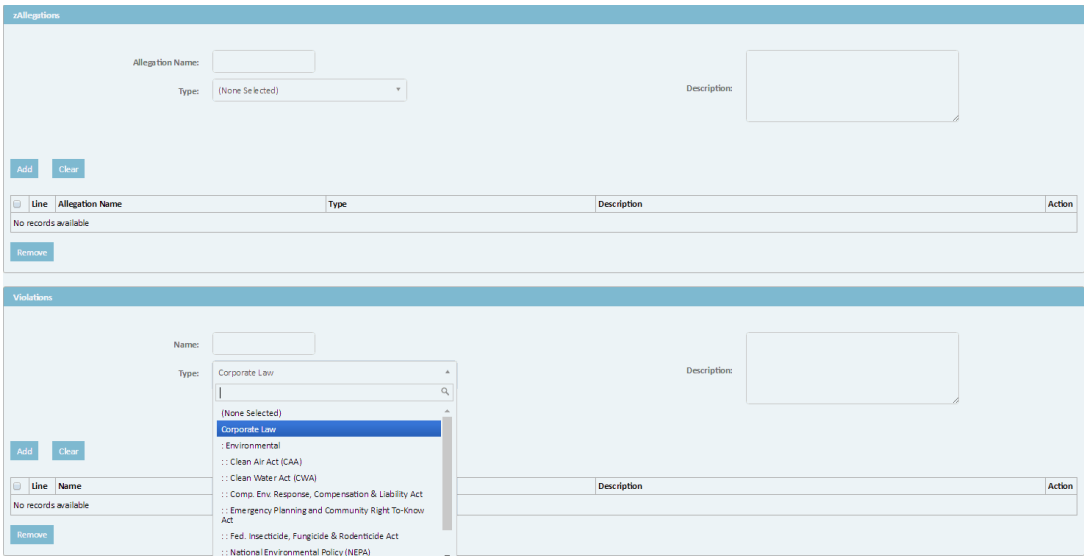
- Entering or Editing Transaction Liabilities and Assets—Create or edit liability and asset information for a transaction matter.
- Entering or Editing Transaction Provisions—Create or edit provision information for a transaction matter.
- Entering or Editing Transaction Terms—Create or edit terms for a transaction matter.

1.10.6.1 Entering or Editing Dispute Allegations or Violations

Use the Dispute **Supplemental** page to enter or edit alleged wrongdoing, in the form of applicable allegations or violations.

To enter or edit allegations or violations

1. Search for a Dispute matter and open it.
2. In the left pane, click the **Supplemental** link.
3. In the **Allegations** and/or **Violations** section, enter or edit information in the **Name**, **Type**, and **Description** fields.



Disputes and Allegations and Violations Sections

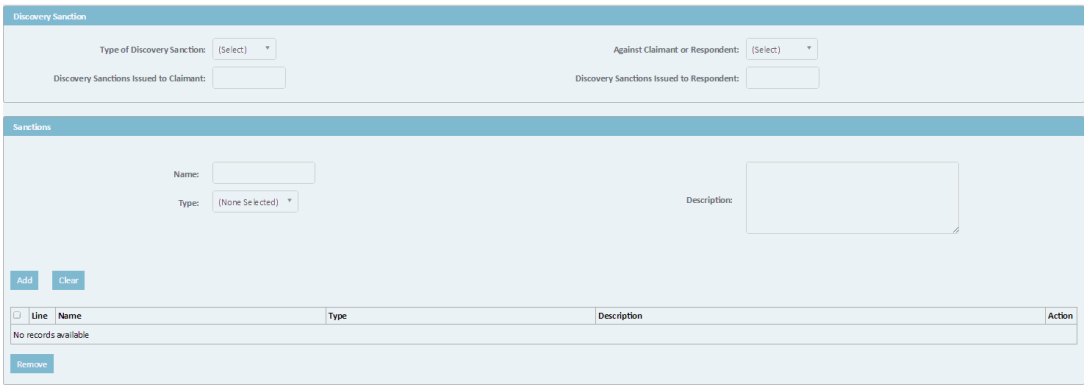
4. Click **Add**.
5. If you need to add additional items, repeat steps 3 and 4.
6. Select a save option.

1.10.6.2 Entering or Editing Dispute Sanctions

Use the **Supplemental** page to enter or edit sanctions in a Dispute record.

To enter or edit sanctions

1. Search for a Dispute matter and open it.
2. In the left pane, click the **Supplemental** link.
3. In the **Sanctions** sections, enter or edit information in the **Name**, **Type**, and **Description** fields.



Disputes Sanctions Sections

4. Click **Add**.
5. If you need to add additional sanction information, repeat steps 3 and 4.
6. Select a save option.

1.10.6.3 Entering or Editing Transaction Liabilities and Assets

Use the **Supplemental** page to enter or edit information about the assets or liabilities that apply to the selected transaction matter. This information can be used in reports or document production.

To enter or edit transaction liabilities and assets

1. Search for a transaction matter and open it.

   The **General** page opens by default.
2. In the left pane, click the **Supplemental** link.
3. Click **Edit**.
4. Select one of the following options:
   - To enter a new liability or asset, in the **Liabilities/Assets** section, enter the **Type (Liability or Asset)**, **Name**, and **Description**, and then click **Add**.
   - To edit an existing liability or asset, select the check box of the item you want to edit. In the **Action** column, click the edit icon  .

     The information that you want to edit appears above in the **Type (Liability or Asset)**, **Name**, and **Description** fields. Edit the information as necessary, and then click **Add**.
5. If necessary, click **Add New Item** to add additional liability and asset entries, and repeat step 4 until you've added all of the necessary entries.
6. Select a save option.

   The liabilities or assets are listed in the **Liabilities/Assets** block.

1.10.6.4 Entering or Editing Transaction Provisions

Transactional matter provision information is useful when you are managing any type of contract, agreement, or merger. By entering this information into a structured format, you prepare it to be used in reports or document production.

To enter or edit transactional matter provisions

1. Search for a Transaction matter and open it.

   The **General** page opens by default.
2. In the left pane, click the **Supplemental** link.
3. Click **Edit**.
4. Select one of the following options:
   - To enter a new transaction provision, in the **Matter Provisions** section, enter the **Provision** and **Description**, and then click **Add** to save the entry.
   - To edit an existing liability or asset, select the check box of the item you want to edit. In the **Action** column, click the edit icon . The information appears above in the **Provision** and **Description** fields. Edit the information as necessary, and then click **Add**.

     If necessary, click **Add New Item** to add additional liability and asset entries, and repeat step 4 until you've added all of the necessary entries.
5. Select a save option.

   The matter provisions are listed in the **Matter Provisions** block.

1.10.6.5 Entering or Editing Transaction Terms

Transactional matter term information is useful when managing any type of contract, agreement, or merger. By entering this information into a structured format, you prepare it to be used in reports or document production.

To enter or edit transactional matter terms

1. Search for a Transaction matter and open it.

   The **General** page opens by default.
2. In the left pane, click the **Supplemental** link.
3. Click **Edit**.
4. Select one of the following options:
   - To enter a new matter term, in the **Matter Terms** section, select a matter term from the **Term** drop-down list, enter a **Description**, and then click **Add** to save the entry.

- To edit an existing liability or asset, select the check box of the item you want to edit. In the **Action** column, click the edit icon . The information appears above in the **Term** and **Description** fields. Edit the information as necessary, and then click **Add**.

5. If necessary, click **Add New Item** to add additional matter term entries, and repeat step 4 until you've added all of the necessary entries.
6. Select a save option.

   The matter terms are listed in the **Matter Terms** block.

1.10.7 Managing Dispute Dispositions

Use the **Disposition** page to enter or edit information about awards and the outcome of Dispute dispositions.

You can perform the following tasks when working with Dispute dispositions:

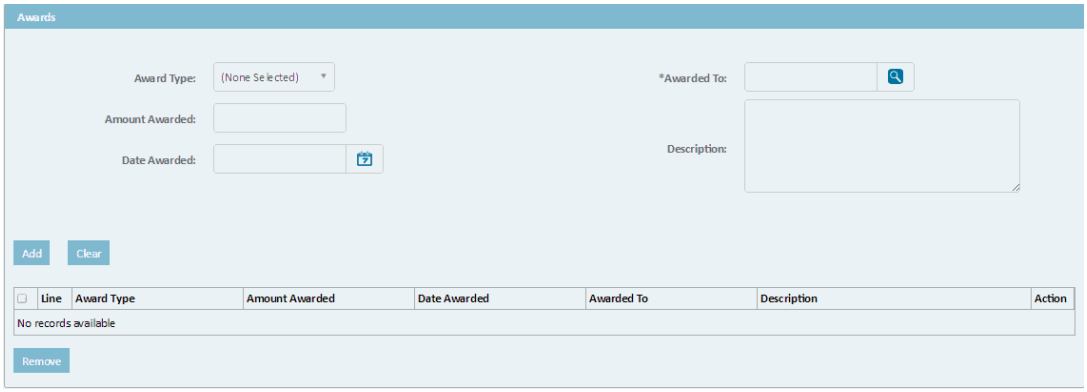
- Entering or Editing Disputes Awards—Enter or change information about a dispute award, including the award type and date, awarded to, and description information.
- Entering or Editing Disputes Outcome Dispositions—Enter or change the information about the outcome of a dispute.

1.10.7.1 Entering or Editing Disputes Awards

Use the **Dispositions** page to enter or edit dispute awards.

To enter or edit dispute awards

1. Search for a Dispute matter and open it.
2. In the left pane, click the **Dispositions** link.
3. In the **Awards** section, enter or edit information in the **Award Type**, **Amount Awarded**, **Date Awarded**, ***Awarded To**, and **Description** fields. **Awarded To** is a required field.



Disputes Awards Section

4. Click **Add**.

5. If you need to enter additional award information, click **Add**, and repeat step 3 for all additional entries.
6. Select a save option.

1.10.7.2 Entering or Editing Disputes Outcome Dispositions

Use the **Disposition** page to enter or edit information about the way that the dispute was resolved. Typically, before you close a Dispute record, you should complete this information.

To enter or edit dispute outcome dispositions

1. Search for a Dispute matter and open it.
2. In the left pane, click the **Dispositions** link.
3. In the **Outcome Dispute Disposition** section, enter or edit the disposition information, including its description, awarded fees and their monetary amounts.
4. Click **Add**.
5. If you need to enter additional disposition information, repeat steps 3 and 4 for all additional entries.
6. Select a save option.

1.10.8 Using Dispute Wizards

You can perform the following tasks using wizards:

- Creating a Dispute Subpoena
- Adding a Dispute Jurisdiction
- Adding a Dispute Opposing Party

1.10.8.1 Creating a Dispute Subpoena

Use the **Create a Subpoena** wizard to create a subpoena record that is related to the selected Dispute record. You can create subpoena's only for Dispute records that are assigned to the **Subpoena** category and you cannot add any other categories to this record.

The subpoena wizard helps you to capture the most pertinent information and allows you to create **Order to produce documents** or **Order to appear** subpoenas.

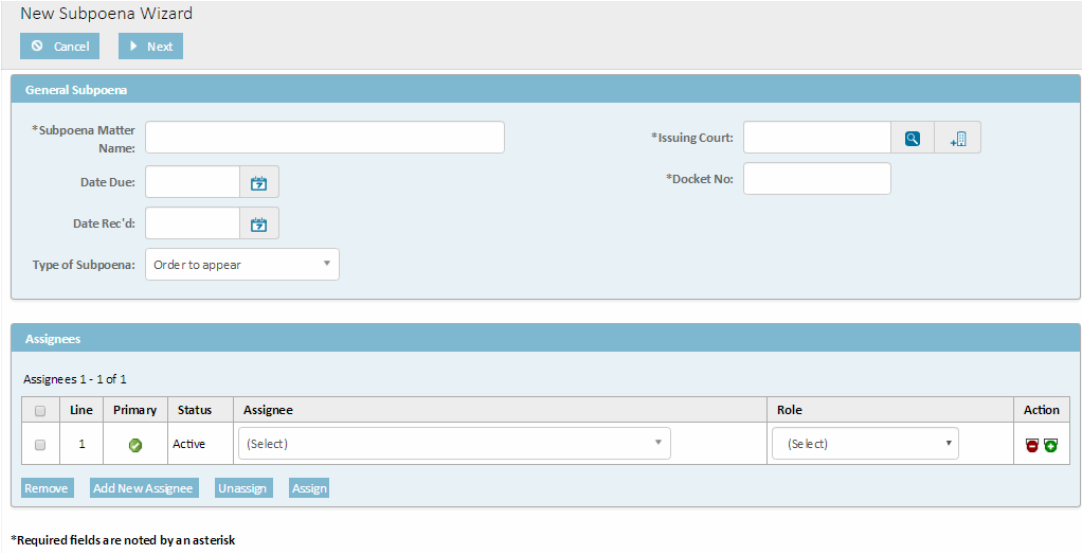
Before creating the new record, the wizard searches the database for any existing subpoenas to make sure that it has not previously been entered. If a new subpoena contains the same **Issuing Court**, **Docket Number**, **Type of Subpoena** values as another subpoena, you have the option to create a new record or update an existing record.

You also can relate subpoenas to Dispute records so that you can open any related subpoena records directly from the Dispute record.

To create a dispute subpoena

1. Click the **Legal** tab.
2. Click the **Disputes** link under the tab bar.
3. Click **New**, and then click **New Subpoena Wizard**.

   The wizard opens to the first page.



Disputes Subpoena Wizard Page One

4. Fill in the fields that describe the subpoena, including the required **Subpoena Matter Name**, **Issuing Court**, and **Docket No** fields.

   For the **Issuing Court** field, click the search icon to select the desired court. This search module only displays contacts with the **External : Court** category.

   If the search doesn't return the court that you need, click New to create a new Issuing Court. Complete the required fields on the contact General page, and then click the Categories link in the lift pane. On the Categories page, select the **External : Court** category, and then select a save option. You are returned to the original wizard page and the new court name is listed in the **Issuing Court** field.

5. In the **Type of Subpoena** field, select one of the following options based on the type of subpoena you are entering:
   - **Order to appear**—The Order to Appear page is displayed when you click **Next**. This is the default option.
   - **Order to produce documents**—The Order to Produce Documents page is displayed when you click **Next**.
6. Select one or both of the following options:
   - If there are no current assignees, select the appropriate user name in the **Assignee** drop-down list and their function in this matter in the **Role** drop-down list. The same user can be assigned to a matter several times if the user has a different role for each assignment.

- To add an additional assignee, click **Add New Item**, and then select the appropriate user name in the Assignee drop-down list.

7. If necessary, in the **Primary** column, select the button for the appropriate primary assignee. The first assignee is selected by default.
8. Click **Next**.
   - If you selected **Order to appear**, use the contact search module to enter the name of the person or company ordered to appear, the time of the appearance and the location.
   - If you selected **Order to produce documents**, complete the appropriate fields, such as the responded date, the name of the party serving the subpoena, and a description.
9. Click **Next**.

   If the **Issuing Court** and **Docket No** fields contain values similar to an existing subpoena, the Potential Duplicate Records page opens. If not, the Matter Relations page opens.
10. If the Potential Duplicate Records page opens, select either **Create a new subpoena with** or select one of the existing subpoenas.
11. Click **Next**.

    The **Matter Relations** page opens.
12. If you want to relate the subpoena to a Dispute record, do the following:
    - Click the **Find** icon  and to locate and select a dispute.
    - Select a value from the **Type of relationship** drop-down list, such as **is subpoena for**.
13. Click **Finish**.

    If you selected an existing subpoena on the Potential Duplicate Records page, any relations you defined are added to the **Related Matters** page of the existing Dispute Subpoena record and the matter you added as a relation.

    If you chose to create a new subpoena, any relations you defined are added to the existing matter record and the new subpoena record.

1.10.8.2 Adding a Dispute Jurisdiction

TeamConnect Legal provides a New Jurisdiction wizard to help you link a court and a judge to the Dispute record and enter the docket number so that this information is readily available from within the dispute. To access the jurisdiction wizard, the **Lawsuit** category must be assigned to the Dispute matter.

You can access the add jurisdiction wizard in two places:

- On the **General** page of a Dispute matter
- On the **Involved/Assignees** page of a Dispute matter

To add a new jurisdiction to a dispute

1. Select one of the following options:
   - Search for and open a Dispute matter that is assigned to the **Lawsuit** category. In the **Lawsuit Jurisdiction Info** section, click **Add New Jurisdiction**.
   - Open the **Involved/Assignees** page for a Dispute matter. In the **Involved Parties** section, click **New Jurisdiction Wizard**.

     To view the dispute category, click the **Categories** link in the left pane.

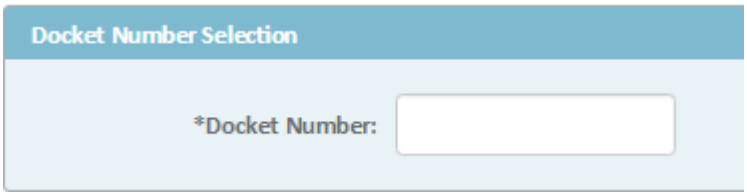
     The **Jurisdiction** wizard opens.
2. In the **Court** field, click the Find icon to locate and select a court. The court's contact record must be assigned to the **External : Court** category.

Disputes Jurisdiction Wizard Page One

3. Next to the **Judge** field, click the Find  icon to locate and select the a judge. The judge's contact record must be assigned to the **External : Judge** category.

   When you add the judge, the wizard sets the **is court of** relationship between the court and its Judge on the **Relations** page of both involved party records.
4. Click **Next**.

   The **Docket Number Selection** page opens.



Disputes Jurisdiction Wizard Page Two

   The **Court** field is required and the wizard will not proceed until you enter a valid contact record with the **External : Court** category. You can leave the Judge field empty, but if you do select a contact record for this field, it must have the **External : Judge** category.
5. Enter a docket number.
6. Click **Finish**.

   The wizard creates involved party records for the court and the judge and displays them in the **Lawsuit Jurisdiction Info** section of the Dispute's **General** page and on the **Involved/ Assignees** page.

1.10.8.3 Adding a Dispute Opposing Party

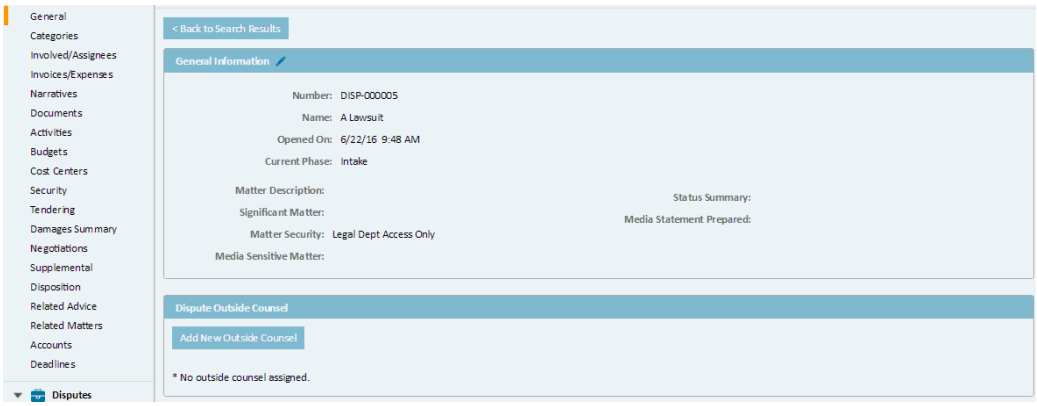
TeamConnect Legal provides an Opposing Party wizard to help you link opposing parties and their representatives to the Dispute record so that this information is readily available from within the dispute. To access the wizard, the Dispute matter must be assigned to the **General Liability/ Claim** or **Lawsuit** category.

You can access the Opposing Party wizard in two places:

- On the **General** page of a Dispute matter
- On the **Involved/Assignees** page of a Dispute matter

To add an opposing party to a dispute

1. Select one of the following options:
   - Search for and open a Dispute matter to which the **Lawsuit** or **General Liability/Claim** category is assigned. In the Opposing Party section, click **Add New Opposing Party**.



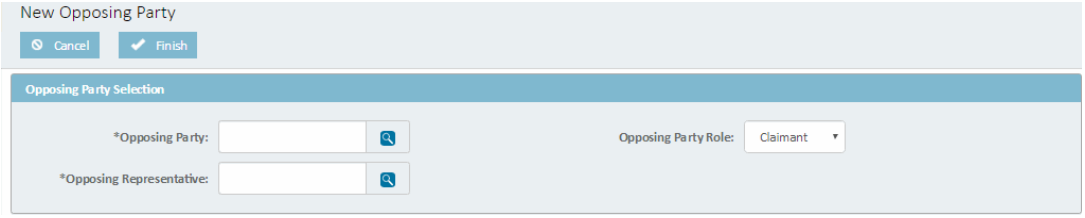
Disputes General Page - Opposing Party Section

   - Open the **Involved/Assignees** page for a Dispute matter. In the Involved Parties section, click **New Opposing Party Wizard**.

     The Opposing Party wizard opens.

     If the **General Liability/Claim** category is assigned to a dispute, the **Opposing Party Selection** page will display the additional **Opposing Representative Role** field.

2. Next to the **Opposing Party** field, click the Find  icon to locate and select a contact record.



Disputes Opposing Party Wizard

3. Select the desired role of the opposing party from the **Opposing Party Role** drop-down list.

4. Next to the **Opposing Representative** field, click the Find icon to locate and select a contact record.
5. If the **Opposing Representative Role** field opens, select the desired role from the list.
6. Click **Finish**.

   The wizard creates involved party records for the opposing party and their representatives and displays them in the **Opposing Party** section of the Dispute's **General** page and on the **Involved/Assignees** page.

1.10.9 Managing Related Advice and Counsel Matters

Use the **Related Advice** page to view, add, or edit Advice and Counsel matters that are related to Dispute or transaction matters. If necessary, you can also use this page to create a new Advice and Counsel matter and relate it to a Dispute or transaction matter.

Advice and Counsel given by legal staff is often related to a Dispute or transaction matter. For example, a dispute may originate with the notification of some activity prior to the filing of a lawsuit or formal notification of a claim by requesting legal advice.

You can track this association in TeamConnect Legal by selecting the existing Advice and Counsel record from within a Dispute or transaction matter. This creates a relationship between the two matter records.

You can also create a new Advice and Counsel record from within the dispute or transaction so that all of the related Advice and Counsel notes and documents are listed within associated Dispute or transaction matter.

You can perform the following tasks when you are working with the **Related Advice** page:

Relating Advice and Counsel Matters

Use the **Related Advice** page to relate an Advice and Counsel matter to a Dispute or Transaction matter.

To relate an Advice and Counsel record to a Dispute or Transaction matter

1. Search for a Dispute or transaction matter and open it. See Searching for Specific Records for more information.
2. In the left pane, click the **Related Advice** link.
3. Click **Edit**.
4. In the **Related Advice and Counsel Matter** field, click the Find icon to locate the appropriate Advice and Counsel matter.
5. Select the Advice and Counsel matter that you want to relate to this record.

You are returned to the **Related Advice** page and the selected matter appears in the **Related Advice and Counsel Matter** field.

6. In the **Comments** field, enter additional details.
7. Click **Add**.

   The selected Advice and Counsel record is now related to the selected matter and appears on the **Related Advice** page of the selected Dispute or transaction matter.

8. To additional relationships, repeat steps 3 through 6.
9. Select a save option.

Editing Related Advice and Counsel Records

Use the **Related Advice** page of a Dispute or Transaction matter to edit a related Advice and Counsel matter.

To edit a related Advice and Counsel record

1. Search for a Dispute or transaction matter and open it. See Searching for Specific Records for more information.
2. In the left pane, click the **Related Advice** link.
3. On the list view, in the **Related Advice and Counsel Matter** column, click the link of the Advice and Counsel record that you want to modify.

   The Advice and Counsel matter opens to its **General** page.

4. Make any necessary changes.
5. Select a save option.

The Advice and Counsel record is updated.

Modifying Related Advice Comments

Use the **Related Advice** page of a Dispute or transaction matter to modify the **Comments** field of a related Advice and Counsel record.

To modify related Advice and Counsel Comments

1. Search for a Dispute or transaction matter and open it. See Searching for Specific Records for more information.
2. In the left pane, click the **Related Advice** link.
3. In the **Action** column, click the edit icon for the Advice and Counsel matter that you want to change.
4. Modify the text in the **Comments** box above, and then click **OK**.

5. Select a save option.

The Advice and Counsel comments are updated.

Removing Related Advice and Counsel Matters

You can remove an Advice and Counsel matter from a Dispute or transaction matter.

To remove a related Advice and Counsel matter

1. Search for a Dispute or transaction matter and open it. See Searching for Specific Records for more information.
2. In the left pane, click the **Related Advice** link.
3. Click **Edit**.
4. In the Line column, check the boxes of the Advice and Counsel matters that you want to remove from the selected matter.
5. Click **Remove**.

The selected Advice and Counsel matters are removed.

1.10.10 Recording Invoice Payment Information

From an invoice's **Payments** page, you can enter information about an invoice payment. For example, you can record the date an invoice was sent to Accounts Payable, an invoice payment's **Check #** or **Check Date**.

To record invoice payment information

1. Search for an invoice and open it.
2. Click the **Payments** link from the left navigation pane.
3. Enter information described in the field descriptions table Invoice Payments Page Fields table.
4. Select a save option.

Invoice Payments Page Field Descriptions

The table below contains the default field information for the Invoice Payments page. The fields that you see may vary based on your system settings and assigned rights. Field descriptions are listed in alphabetical order and may display in a different order in the application.

Invoice Payment Page Fields

Label	Description

Check #	The check number used for invoice payment.
Check Date	The date the invoice payment check was issued.
PO Number	The invoice PO number.
Ready to send to AP	check box to indicate status of an invoice. If checked, the invoice is ready to sent to accounts payable (AP).
Sent to AP	Date that an invoice was sent to accounts payable (AP).
Total Amount on Check	The invoice payment check amount.
Withholding Amount	The amount of a billed invoice that is withheld.

1.11 Time Entry Tool

The Time Entry Tool is like a time sheet organized by your company's billing time periods. You can enter time entry records using the Time Entry Tool. In addition, you can post or void time entries using the tool.

You can perform the following tasks using the Time Entry Tool:

- Opening the Time Entry Tool
- Adding a Time Entry
- Posting a Task
- Voiding a Time Entry

1.11.1 Opening the Time Entry Tool

You might be able to open the **Time Entry Tool** from one of the following locations:

- From the **My Pending Tasks** portal pane on your homepage, click the **Enter Time** link.
- From the **All Services** tab, under **Tools**, click the **Time Entry Tool** link.
- From an open matter (for example, Transaction, Dispute, Project), select the **Activities** tab, and click the **Time Entry Tool** link.

Time Entry Tool Screen Field Descriptions

The table below contains the default field information for the Time Entry Tool. The fields that you see may vary based on your system settings and assigned rights.

Time Entry Tool Fields

Field or control	Description
Add	Click to add the time entry to the table.
Remove	Click to remove the selected time entries from the existing time entries table.
Show	Select one of the following: • **All**—Displays posted and unposted time entries. • **Posted**—Displays only posted time entries. • **Unposted**—Displays only unposted time entries.
Tasks For	Click the icon next to the field to select a date within the desired time period.
Timekeeper	Select the Timekeeper for the time entry. By default, your name displays. If you have the rights to act as timekeeper for other timekeepers, their names also display in the drop-down list.
Available Hours	(read-only) Displays the total billable hours for this time period.
Total Hours	(read-only) Displays the current total number of hours for the time entries in this time period. This field displays in red while the **Total Hours** value is less than the **Available Hours** value.
Post All	Click to post all current time entries for this time period.
Void All	Click to void all current time entries for this time period.
Matter	Find and select the matter you want to associate with the time entry.
Description	Enter a description of the time entry.
Category	Select the appropriate category for the time entry.
Completed On	Enter a date or click the calendar icon next to the field to select the date when the time entry is completed.
Hours	Enter the number of hours spent for the time entry.
Posting Status	(read-only) Displays one of the following:

	• **Posted**—The time entry has been submitted as a billable activity. • **Not Posted**—The time entry has not been submitted as a billable activity.
Time Entry table	Displays the list of time entries. Select the corresponding check boxes on the left to edit, delete, post, or void the respective time entries.
Post	Click to post the selected time entries to their respective accounts.
Void	Click to void the selected time entries.

1.11.2 Adding a Time Entry

The following procedures describe the default Time Entry Tool fields. If your TeamConnect Legal Administrator has customized the Time Entry Tool, you may see different fields on your screen.

To add a time entry using the Time Entry Tool

1. From the **All Services** tab, under **Tools**, click the **Time Entry Tool** link.
2. From the **Tasks For** field, click the  icon and select a date from the time period for which you will add time entries.
3. Select a name from the **Timekeepers** drop-down list. If you have been given the right to act as a designated timekeeper, you can add a time entry for another timekeeper.
4. For each time entry, complete the following:
   - Enter a **Description** for the time entry.
   - From the **Completed On** field, click the **Calendar** icon and select the date of task completion.
   - Select a **Matter** to associate with the time entry.
   - From the **Category** drop-down list, select a task category.
   - Enter the **Hours** spent on the task. For example, 5.5.
5. After completing the time entry, click **Add**.

   The time entries table should update and display the new time entry.

Possible Time Entry Tool Results Messages

- **Cannot add Time Entry because Time period is processed**—The administrator who reviews time periods closed this period. Contact the administrator for more information.

- **Description in Task cannot be null or empty**—You tried to add a time entry without typing a short description.

Time Entry Tool and Task Records

In addition to adding a time entry using the Time Entry Tool, you can create a task from a **New Task** screen or a matter's **Activities** page.

Note: *The Time Entry Tool only displays these task records you created if you select a* ***Category*** *also in the drop-down list of the time entry tool settings.*

The following table displays the relationship between Time Entry Tool fields, Task field names (Matter Management Object Model), and Task record field names.

Time Entry Tool and Task-related Fields

Time Entry Tool Label Names	Task Field Names (Object Model)	Task Record Field Labels
Description	**shortDescription**	**Subject**
Completed On	**completedOn**	**Completed On**
Matter	**project**	**Dispute, Transaction, Project**
Category	**defaultCategory**	**Default Category**
Hours	**actualHours**	**Actual Work**
Activity Item	**activityItem**	**Activity**

1.11.3 Posting a Task

You can either post all time entries for a time period at once or post time entries for that Time Period individually.

To post a time entry you enter using the time entry tool, you must update the billing information from the task record.

To update billing information for a task

1. Open the matter associated with the time entry.
2. Click the **Activities** link in the left pane.
3. Click the time entry link in the **Tasks** section. Find the **Description** entered with the Time Entry Tool in the subject column.

4. Click **Edit**.
5. Enter a **Rate** under **Billing Information**.
6. Save the record.

To post a task in the Time Entry Tool

1. From the **All Services** tab, under **Tools**, click the **Time Entry Tool** link.
2. From the **Tasks For** field, click the  icon and select a date from the time period for which you will post time entries.
3. Select a name from the Timekeepers drop-down list. If you have been given the right to act as a designated timekeeper, you can add a time entry for another timekeeper.
4. Determine which time entries you want to post:
   - To post all time entries simultaneously, click **Post All**.
   - To post individual time entries, check the box(es) in the time entries table for the tasks to post, and click **Post**.

The time entry's **Posting Status** displays **Posted** for each posted time entry.

Troubleshooting

If you receive this post rejected message, perform the following actions:

- Check the budget for the related matter to verify that the account has sufficient money.
- Make sure the entry has enough billing information.

1.11.4 Voiding a Time Entry

For time entries that have been posted, you can reverse the action by voiding them. You can either void all time entries for a time period at once or void time entries individually.

To void a time entry from the Time Entry Tool

1. From the **All Services** tab, under **Tools**, click the **Time Entry Tool** link.
2. From the **Tasks For** field, click the  icon and select a date from the time period for which you will void time entries.
3. Select a name from the **Timekeepers** drop-down list. If you have been given the right to act as a designated timekeeper, you can add a time entry for another timekeeper.
4. Determine which time entries you want to void:
   - To void all time entries simultaneously, click **Void All**.

- To void time entries individually, check the box(es) in the time entries table for the time entries to void, and click **Void**.

5. The time entry's **Posting Status** should display **Not Posted**.

2 Legal Matter Management Administrator Help

Welcome to the *TeamConnect® Legal Matter Management Administrator Help*.

Time Entry Tool

2.1 Time Entry Tool

This topic applies to TeamConnect®Legal Matter Management only. This section describes how to set up and use the Time Entry Tool for administrators.

2.1.1 Time Entry Tool Setup

This topic applies to TeamConnect®Legal Matter Management only. The Time Entry Tool comes with default settings that allow you to use it out of the box. You will need to configure rights for Users/User Groups and Contacts to enable rights to perform Time Entry Tool Administrator and User functions.

Important: *You must set a default rate for each timekeeper or errors will occur when using the Time Entry Tool.*

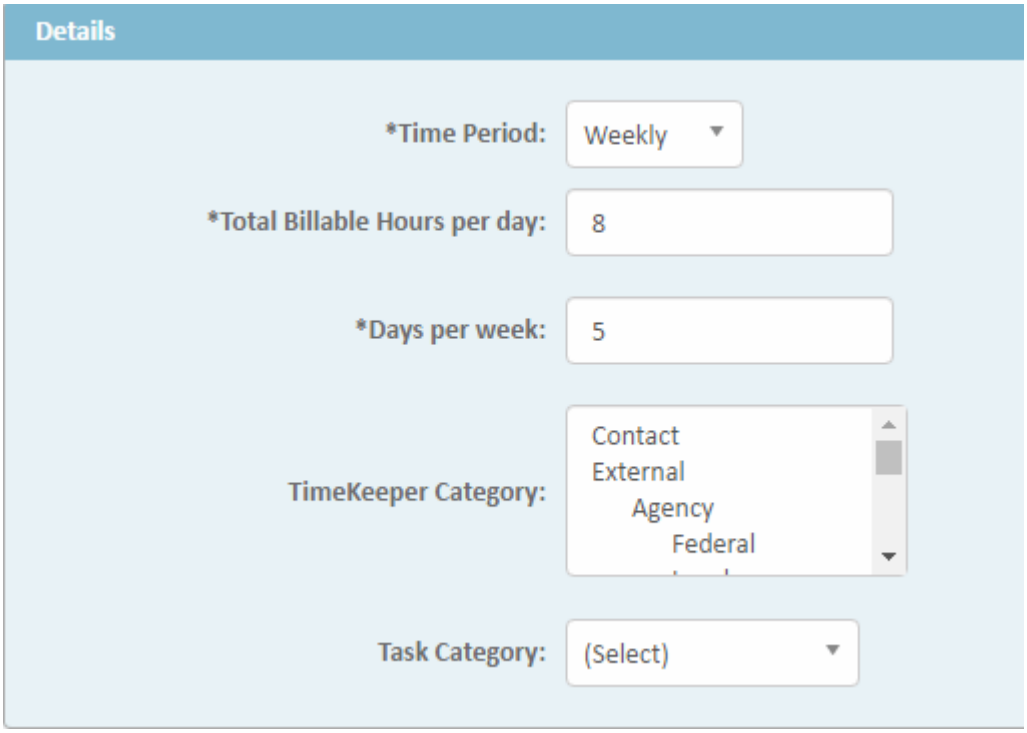
This section describes:

- Out-of-the-box default settings for the Time Entry Tool.
- How to set up and customize the tool.

2.1.1.1 Editing Time Entry Tool Settings

This topic applies to TeamConnect®Legal Matter Management only. You can customize the Time Entry Tool by changing the default settings that determine:

- Billing Period definition
- Daily Billable hours
- Timekeeper required categories
- Task Category



Time Entry Settings Details Section

To edit Time Entry Tool Settings

You can edit the default settings that affect billing Time Period organization, the Time Entry Tool **Available Hours** value, that determine who can use the Time Entry Tool, and available Task Categories from the Time Entry Tool.

1. Click the **Time Entry Settings** link under the **All** tab in the upper-right of TeamConnect.
2. Click the **Edit Record** icon . The following fields are on the **General** page, **Details** section.
3. To change the **Time Period**, click the drop-down list and select **Daily**, **Weekly** (default), or **Monthly**. The period determines the time span for which Legal Administrators can define billing Time Periods and time spans for which users can enter time entries.
4. If you selected **Weekly** for the **Time Period** above, type the billable **Days per week**.

   Days per week only displays if the **Time Period** was set to Weekly.
5. Type the **Total Billable Hours per day** (default - 8). On the Time Entry Tool, this value is used to calculate the total **Available Hours** for a Time Period.

   For weekly time periods, the **Total Billable Hours per day** value is multiplied by the **Days per week** value (described above) to produce the Available Hours (displayed on the Time Entry Tool). For example, for one week's time period, the default **Available Hours** could be (6 Days per week * 8 Total Billable Hours per day) = 48 hours.

   For monthly time periods, Monday through Friday are considered billable (or there are 5 billable days per week). For example, **Available Hours** for the month of June (21 weekdays) would be (21 Days per month * 8 Total Billable Hours per day) = 168 hours.

6. Select one or more **Timekeeper Categories**. These values determine the default category required for a TeamConnect®Legal Matter Management contact to be authorized as a timekeeper (prerequisite to using the Time Entry Tool).

7. To restrict the **Task Category** to describe a new record, click the drop-down list and select a category. In the Time Entry Tool, this value (and child categories) displays as an option from the Category drop-down list when adding time entries.

   In the Time Entry Tool, only tasks (created from Disputes or Transaction Matter records) with the **Default Category** that is specified in the drop-down list as the current **Task Category** will display. For example, if a new task record with **Default Category** of Internal Tasks (default **Task Category** value in Time Entry Settings) is saved, then that task will display as a time entry in the Time Entry Tool.

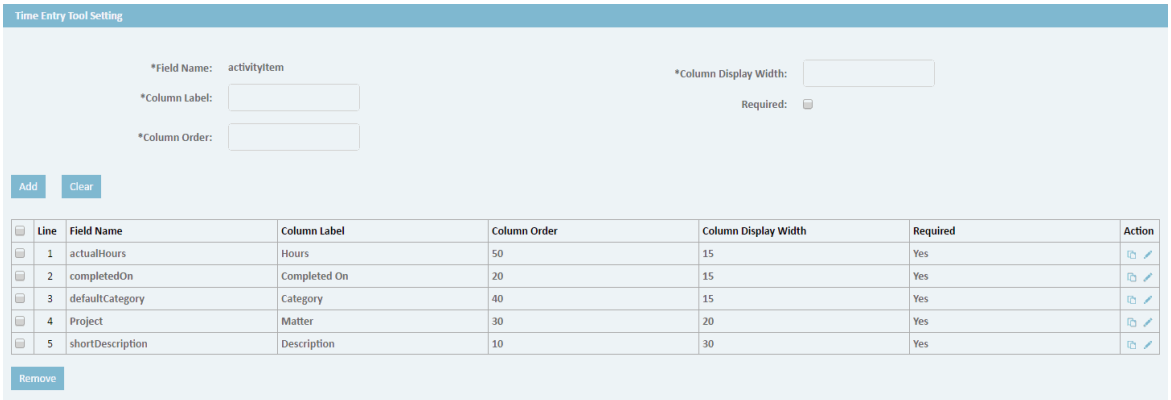
8. Click a save option.

2.1.1.2 Editing Default Time Entry Tool Fields

This topic applies to TeamConnect®Legal Matter Management only. The Time Entry Tool has been created with default fields and field settings. For all fields, you can change the following settings:

- Column Label
- Column Order
- Column Display Width
- Required

By default, one field, **Task Activity** is hidden. You can activate this field or later hide it again. The existing default fields cannot be hidden.



Line	Field Name	Column Label	Column Order	Column Display Width	Required	Action
1	actualHours	Hours	50	15	Yes	
2	completedOn	Completed On	20	15	Yes	
3	defaultCategory	Category	40	15	Yes	
4	Project	Matter	30	20	Yes	
5	shortDescription	Description	10	30	Yes	

Time Entry Settings, Time Entry Tool Setting Section

To edit default Time Entry Tool fields

You can change how Time Entry Tool fields display and whether the fields are required by users.

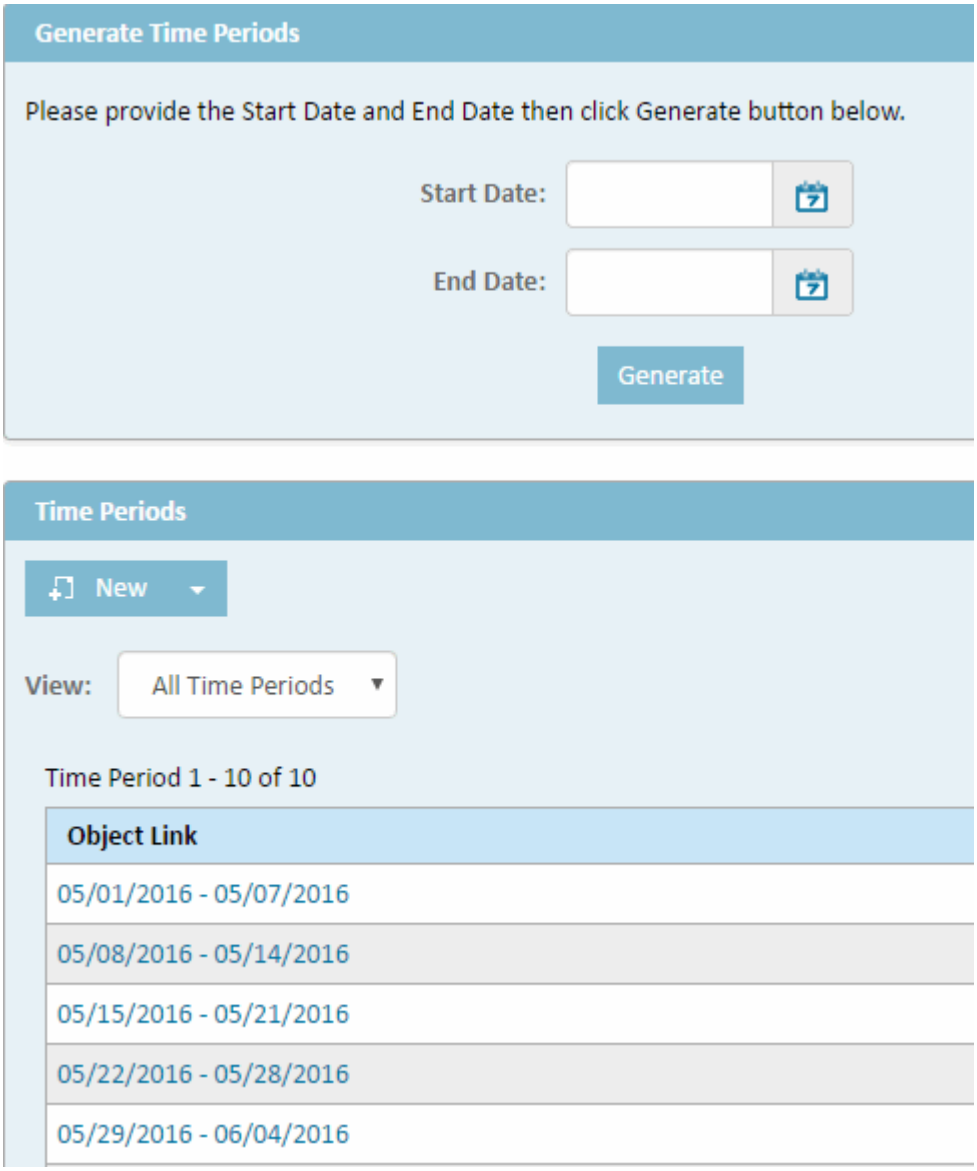
1. Click the **Time Entry Settings** link under the **All** tab in the upper-right of TeamConnect.

Click the **Edit Record** icon . The following fields are on the **General** page, **Time Entry Tool Setting** section.

1. To change the text that displays for default fields on the Time Entry Tool:
   a. Select the check-box(es) next to the existing **Field Name** and click **edit**.
   b. Type the new text to identify the field in the **Column Label** box.
   c. Click **ok** on that field row.
2. To change the position of a Time Entry Tool field from left to right:
   a. Select the check-box(es) next to the existing **Field Name** and click **edit**.
   b. Type a numeric value in the **Column Order** box, where the lowest value displays furthest to the left and the highest value displays furthest to the right on the screen.
   c. Click **ok** on that field row.
3. To change the maximum length for displaying the field's **Column Label**:
   a. Select the check-box(es) next to the existing **Field Name** and click **edit**.
   b. Type a numeric value in the **Column Display Width** box. This value determines the length of space allotted to display the corresponding Time Entry Tool field value. For example, for the **actualHours** field, the default **Column Display Width** of 6 would allow a Time Entry Tool user to enter a value like 100.25
   c. Click **ok** on that field row.
4. To set whether an existing Time Entry Tool field is required by users to complete:
   a. Select the check-box(es) next to the existing **Field Name** and click **edit**.
   b. Clear the **Required** check-box to display the field but allow blank values, or select the **Required** check-box to prevent saving this field with blank values.
   c. Click **ok** on that field row.
5. To display the **activityItem** field on the Time Entry Tool:
   a. From the **Number of entries you would like to add**: drop-down list, select 1.
   b. From the **Field Name** drop-down list, select **activityItem**.
   c. Type a descriptive field label in **Column Label** box (for example, Task Activity).
   d. Type the field's **Column Order** (number).
   e. Type the **Column Display Width**.
   f. Select the **Required** check-box. See field explanations above for more information.
6. Click a save option.

2.1.1.3 Creating Billing Time Periods

This topic applies to TeamConnect®Legal Matter Management only. You can define Time Periods to organize billing periods in which timekeepers enter records for the Time Entry Tool. There are two sections from which you can create a Time Period. You can use the Create Next Fiscal Budget tool, to create Billing Time Periods that match corresponding budgets (for example, yearly periods) or you can define independent Time Periods from the Time Entry Settings area (for example, on a daily, weekly, or monthly basis).



Time Entry Settings, Time Periods Page

You can create Time Periods to match corresponding budgets (using the Fiscal Year tool), or you can create autonomous time periods using the date fields in the Time Entry Settings. For more details, see Create New Fiscal Year Budgets.

To create Time Periods from Time Entry Settings

If you have already created billing Time Periods from the Create Next Fiscal Budget tool, you can skip this procedure. The **Generate Time Periods** section allows quick creation of multiple **Time Periods**. The Time Periods section allows creation of individual Time Periods and overriding the default **Available Hours** calculation.

1. Click the **Time Entry Settings** link under the **All** tab in the upper-right of TeamConnect.
2. Click the **Edit Record** icon .

   The Time **Entry Settings - General** page opens.
3. Click the **Time Periods** link from the left pane.
4. To create multiple Time Periods quickly, from the **Generate Time Periods** section, click the Calendar icon for **Start Date** and select a date. Click the Calendar icon for End Date and select a date.

   If the date range spans multiple time periods, then multiple time periods will be created. For example, if the time period is monthly and the start date is

   06/01/2007 and the end date is 08/31/2007, then three time periods will be created.

   Click **Generate**.

   Click a save option (for the Time Entry Setting Record).

   It is recommended to create Time Periods from the Generate Time Periods section because the Time Entry Tool **Available Hours** will be automatically calculated based on the **Billable Hours Per Day** * (billable) **Days in the Time Period**.
5. To create individual Time Periods, from the **Time Periods** section, click **New**.

   Click the Calendar icon for **End Date** and select a date.

   Click the Calendar icon for **Start Date** and select a date.

   Type a number in **Total Billable Hours** (sets the **Available Hours** in the Time Entry Tool).

   Click a save option.

   The default naming convention for new Time Periods is "Start Date"-"End Date". For example, 06/01/2007 - 06/30/07.

2.1.1.4 Creating Individual Billing Time Periods

This topic applies to TeamConnect®Legal Matter Management only. This topic describes how to create an individual Billing Time Period from a Time Period record. For more information about Billing Time Periods, see Creating Billing Time Periods.

To create individual Time Periods from Time Entry Settings

If you have already created billing Time Periods from the Create Next Fiscal Budget tool, you can skip this procedure. The Time Periods section allows creation of individual Time Periods and overriding the default **Available Hours** calculation.

1. Click the **Time Entry Settings** link under the **All** tab in the upper-right of TeamConnect.
2. Click the **Edit Record** icon .

   The **Time Entry Settings - General** page opens.
3. Click the **Time Periods** link from the left pane.
4. To create individual Time Periods, from the **Time Periods** section, click **New**.
5. Click the Calendar icon for **End Date** and select a date.
6. Click the Calendar icon for **Start Date** and select a date.
7. Type a number in **Total Billable Hours** (sets the **Available Hours** in the Time Entry Tool).
8. Click a save option

   The default naming convention for new Time Periods is "Start Date"-"End Date". For example, 06/01/2007 - 06/30/07.

   Only the fields on the **General** page are required. Additional pages display for a Time Period record (**Categories**, **Phases**, **Assignees**, **Relations**, **Documents**, **Security**, **Tasks**, **Appointments**, **History**, **Expenses**, **Accounts**, **Workflow** pages) but they are generally not used.

2.1.1.5 Managing Timekeepers

This topic applies to TeamConnect®Legal Matter Management only. Members of the System Administrator group have the authority to set up designated timekeepers, which give one timekeeper the authority to enter another timekeeper's time entries.

Important: *You must set a default rate in the contact record of each timekeeper or errors will occur when using the Time Entry Tool.*

To delegate Timekeeping duties

You can delegate timekeepers to enter time for another timekeeper. For example, if Ralph and Tim are timekeepers, a **Timekeeper** (Tim) can have the ability to enter time for a **Designated Timekeeper** (Ralph's time entries) in the Time Entry Tool.

1. Click the **Time Entry Settings** link under the **All** tab in the upper-right of TeamConnect.
2. If the Time Entry Settings record does not display, click the **All Time Entry Settings** link from the left pane.
3. Click the **Edit Record** icon .
4. Click the **Designated Timekeepers** link from the left pane.
5. From the **Timekeeper** drop-down list, select the timekeeper you are designating to enter time for another timekeeper. For example, if you want Tim to enter Ralph's time entries, select Tim.

6. From the **Designated Timekeeper** drop-down list, select the actual timekeeper. For example, if Tim enters Ralph's time entries, select Ralph.
7. Click **Add** to add the designated timekeeper entry to the table.
8. Click a save option (for the Time Entry Setting record).

To update the designated Timekeepers list

You can edit delegated timekeepers on the **Designated Timekeepers** list.

1. Click the **Time Entry Settings** link under the **All** tab in the upper-right of TeamConnect.
2. If the Time Entry Settings record does not display, click the **All Time Entry Settings** link from the left pane.
3. Click the **Edit Record** icon .
4. Click the **Designated Timekeepers** link from the left pane.
5. Click the icon in the **Action** column of the row to update.
6. Make changes to the **Designated Timekeeper** entry.
7. Click **Ok** to save your changes.
8. Click a save option (for the Time Entry Setting record).

To delete the designated Timekeeper-Delegate combinations

You can remove designated timekeeper combinations.

1. Click the **Time Entry Settings** link under the **All** tab in the upper-right of TeamConnect.
2. If the Time Entry Settings record does not display, click the **All Time Entry Settings** link from the left pane.
3. Click the **Edit Record** icon .
4. Click the **Designated Timekeepers** link from the left pane.
5. Select the check-boxes next to existing rows you want to delete.
6. Click **Remove**.
7. Click a save option (for the Time Entry Setting record).

2.1.2 Using the Time Entry Tool as Administrator

This topic applies to TeamConnect®Legal Matter Management only. The Legal Administrator group can do the following:

- Review and verify the time entries for all timekeepers' entries in the Time Entry Tool.

- Change the phase of a billing time period.
- Add, change (edit, post, void), or delete time entries for other timekeepers.

For more information, see the Legal Matter Management User Help.

Reviewing Time Entries

While reviewing timekeepers' entries in the Time Entry Tool or after the time period has ended, you can lock the corresponding time period. If the time period phase is locked, timekeepers will be prevented from entering, changing, posting, voiding, or deleting time entries from the Time Entry Tool.

To verify time entries for a Time Period

1. From the **Tools** list, click the **Time Entry Tool** link.
2. For the **Task For**, select the time period to view by clicking the Calendar icon to select a date.
   - If the time period is weekly, the corresponding week's time period is displayed.
   - If the time period is monthly, the corresponding month's time period is displayed.
3. From the **Timekeepers** drop-down list, select the timekeeper whose time entries to view.

Time Period Phases

A Time Period can have the following phases:

- **Un-Lock**—(default) Allows timekeepers to enter, change (edit, post, void), and delete time entries in the Time Entry Tool
- **Lock**—Prevents timekeepers from entering, changing (editing, posting, voiding), and deleting time entries in the Time Entry Tool. A Time Period in Locked phase can be changed to **Un-Lock** or **Processed** phases.
- **Processed**—Prevents timekeepers from entering, changing (editing, posting, voiding), and deleting time entries in the Time Entry Tool. After a Time Period is set to the **Processed** phase, you cannot change it to previous phases.

To change a Time Period's phase

1. Click the **Time Entry Settings** link under the **All** tab in the upper-right of TeamConnect.
2. Click the **Edit Record** icon  .
3. Click the **Time Periods** link from the left pane.
4. From the **Time Periods** page **Filter** section, search for a Time Period.
5. From the **Results** tab, click a Time Period name.

6. From the **(actions)** drop-down list, select one of the following:
   - **Un-Lock**—Only displays if the current phase is Lock.
   - **Lock**—Only displays if the current phase is unlocked.
   - Processed
7. From the confirmation dialog, click **OK**.

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