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User Guide CSC Matter Management[™]

C/) CSC

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Contact Information

CSC Matter Management Support Team | Monday–Friday 8 a.m.–8 p.m. ET 800-490-9035 @mmsupport@cscglobal.com

1. Introduction

1.1. Welcome to CSC Matter Management

Thank you for choosing CSC Matter Management. This user guide takes you through all the basic steps to easily and electronically organize your service of process (SOP) and legal matters in a way that makes sense to you—including the corresponding documents, stakeholders, and information. Use this guide as a resource to ensure your team is getting the maximum benefit from the application.

CSC Matter Management is designed to be your accessible, online filing cabinet. With no license fees, additional software, IT involvement, or implementation charges—you may simply log into the CSC Matter Management website and get to work.

This system is a flexible and robust solution that can be used for more than just litigation management. It can be easily configured to meet your matter management needs, and allows you to collaborate with your internal and external teams, monitor activities, and create relevant reports.

Here are just some of the many capabilities CSC Matter Management provides:

- Review and approve outside counsel bills
- Manage garnishments, discovery, real estate, contracts, and deals
- Share documents and matter details
- Create virtual private workrooms
- Collaborate on message boards with everyone on your team

This guide takes you through CSC Matter Management and provides instructions, guidance, and function insights so you can use the application to the fullest.

1.2. What is a matter?

Throughout CSC Matter Management, you will see references to matters. A matter simply refers to a grouping of formal documents and information (i.e., a file folder). The file folder and title on the tab is the matter, and all documents and information stored in the folder are associated with the matter.

1.2.1. What are matter templates?

CSC Matter Management includes three standard templates that represent the two commonly uploaded matter types. The standard templates include the following (although you may add additional templates):

- Litigation
- Transaction

Whenever a new matter is created, the system automatically selects a pre-configured template. You can change this template as needed. After creating the matter from the template, you can assign it to various users.

1.3. About the documentation

This User Guide contains the following documentation:

- Description of CSC Matter Management features
- CSC Matter Management basics, including everything that is needed for setup and use
- Step-by-step tutorials, with screenshots and helpful tips for productivity

Important reminders are indicated as tips and common mistakes, and screenshots are provided throughout the manual to guide users through the CSC Matter Management system. Note that your screen may look slightly different depending on field values and your access.

1.4. System icons

Within CSC Matter Management, you will encounter the following system icons:



1.5. CSC on the web

CSC's website cscglobal.com contains a wealth of information about CSC's business services, customer support information, company news, and much more.

2. Navigation

2.1. Matters and SOP

System users can use the MATTERS & SOP dropdown menu to navigate to matters and notes.

The following CSC Matter Management categories are available:

- Matters: Displays all matters. Note that users will only be able to view matters they have permission to access.
- Notes: Displays notes entered by users across all matters. These notes are related to specific matters and/or specific documents.

| CSCNavigator ® | | ۲ |
|--|--------------------------------|-------|
| MY DASHBOARD ENTITIES LICENSES & PERMITS | MATTERS & SOP ORDERS & RESULTS | DOCUN |
| Matters | Tasks | |
| Displaying: 1 - 24 Results Limited to 1000 Records | Matters | |
| Matter Actions | Notes | |
| | Organization | ter: |
| MATTER ID MATTER FU | Agent Addresses | |
| | | |

Figure 1: Matters & SOP dropdown list

2.2. Documents

The **DOCUMENTS** module displays all documents that have been uploaded to CSC Matter Management. Note that users will only be able to view documents for matters they have permission to access.

2.3. Reports

Within the **REPORTS** module, system users can build and run customized reports.

2.4. Admin

Under **ADMIN**, system users can administer their account settings. Administrators can also add new users to CSC Matter Management and assign them to User Groups.

3. Initial login

To set up and use the CSC Matter Management system, you must have a user account. To register for an account, please go to our website at <u>cscglobal.com</u> or call 800-490-9035. Once you have registered, you can log into the system by performing the steps below. Note all users are required to accept the Terms of Service when they first log in.

Once your account has been configured:

- 1. You will receive an email containing your username, as well as a link to set up your password.
- 2. To access the system, click the link in the email.
- 3. Select and answer your two security questions and click CONTINUE.
- 4. Enter and confirm your new password and click CONTINUE.
- 5. Then use your username and password for the two-step login process.
- 6. Note that if you would like the system to remember your username and password on the computer you're using, place a check in the box in next to **Remember Me. Do not check the box if you are on a public computer.**



Figure 2: Logging in

- 7. Upon first login, you are required to review the Terms of Service. You may accept the Terms of Service by clicking **I ACCEPT** then **SUBMIT.**
- 8. Your account is now active.



CSC Dashboard | Technical Support | FAQ | Privacy Statement | Terms of Use | Browser Policy

Terms of Service

Terms of Service

| Corporation Service Company SM (CSC [®]) provides the CSC Entity Management Compliance and Governance service and CSC Matter Management SM Litigation and Matter Management solution ("CSC Entity Management" and "CSC Matter Management" and collectively the "Services") to you subject to the following Terms of Service and CSC [®] Strivey Statement and Security Statement. |
|--|
| By clicking on "I Accept" at the time of registration for the Services, you agree to be bound by and abide by these terms and conditions. CSC may change the Terms of Service from time to time. Your use of the Services indicates your continued acceptance of these terms. |
| E-Billing Vendors E-Billing vendors ("Vendors") that use our E-Billing Services do not agree to the legal terms contained herein, other than the legal terms specifically listed in this E-Billing Vendors section. Vendors agree (1) to keep confidential any information that is accessible on or through our Services; (2) to keep login information credentials secure and not to share login information with any party; (3) not to use our Services; (2) to keep login information credentials secures the rights of third parties. CSC reserves the right, in its sole discretion, to terminate access to a Vendor or any of its agents for any reason and at any time. |
| Access to Services In order to use the Services, you acknowledge and agree that you must provide for your own access to the World Wide Web and pay any service fees associated with such access, and provide all equipment necessary for you to make such connection to the World Wide Web, including a computer and modem or other access device. You further acknowledge and agree that a current membership to CSCGlobal ¹⁵⁴ , GSC's web portal, is a prerequisite for access to the Services. |
| Obligation to Pay Fees You acknowledge and agree to pay all subscription and service fees, if any, that CSC charges you for the Service pursuant to the terms of the invoice. |
| Registration In consideration of your use of the Services, you agree to: (i.) provide true, accurate, current and complete information as prompted by the registration form for the Services; and (ii.) promptly update such information to keep it true, accurate, current and complete. If you provide any information that is untrue, inaccurate, not current or incomplete, or CSC has reasonable grounds to believe that such information is untrue, inaccurate, not current or incomplete, CSC reserves the right to suppend or terminant your account and to refuse any and all current or funce or thus use of the Services. Furthermore, each registration is for a single person only, as further provided herein |
| Passwords Each registration for the Services is for a single person ("User") only. Each User will be provided with a User ID, and password. CSC does not permit any other person to use the Service under your User ID, or access through a single name being available to multiple users on a network. You acknowledge and agree that you are responsible for preventing such unauthorized use and for the confidentiality of your User ID and password. You agree to notify CSC immediately if you become aware of any loss or theft or unauthorized use of your User i.d. and/or password. You acknowledge and agree that you will be responsible for all data entered through or under your User ID and password. CSC will act as though any data it receives under your User ID and password was sent by you. |
| Two Levels of Security: The Services offsecurity: The Services offsecurity to its Users ("Level I" and "Level II"). Level I security is the Service's default setting. With Level I security, all Users associated with your organization have complete access to all of your information. Alternatively, you may select the optional Level II security, which permits you to appoint a "System Administrator" for your organization. The System Administrator is responsible for managing User access and information viewing options for Users associated with your organization. Level II security can be selected at the time of registration or at any later time upon request to CSC. You acknowledge and agree that if the Level II security option is not selected, all Users associated with your organization will have complete access to all of your information. You acknowledge and agree that CSC shall not be reponsible or liable, directly or inducedly, for any durined or alleged to be caused by your failure to select the Level II security. |
| Manipulation of Data You acknowledge and agree to the following with respect to your compliance and governance data that is on the Service (the "Data"): |
| a. CSC shall be entitled, but is not obligated, to review or retain the Data for your compliance with the Terms of Service and the security of the Service; b. Except as otherwise indicated herein. CSC may update the Data upon your request, or upon its own discretion if necessary to maintain accurate jurisdictional Data. Jurisdictional Data includes but is not limited to entity type, state identification number, date of films or |
| SUBMIT CANCEL |
| Copyright © 2020 Corporation Service Company. All rights reserved. Technical Support Privacy Statement Terms of Use Browser Policy |
| |

Figure 3: Terms of Service (displayed at initial log in)

3.1. Setting up your profile

When you log into CSC Matter Management for the first time, you will be asked to set up your profile and preferences. Note that preferences include your display, template, and alert settings.

It's important to set up all your information at this time so you receive notifications regarding new SOP and other documents being added to CSC Matter Management.

Once you've logged in for the first time and completed the profile and preferences setup process, you can modify your profile or preferences by clicking ADMIN from the application's main menu.



Figure 4: Admin button (accessible from main menu)

3.1.1. Profile setup

Within the Manage My User Profile section, update the following information:

- 1. Contact Information, Email: All alerts you receive will be sent to this email address. Change, if necessary.
- 2. Once completed, click Save.

| Manage My User | r Profile | |
|----------------------------|-------------------------|------|
| Title and Full Name | | |
| Title: | | |
| * First Name: | Matter Management |] |
| Middle Name: | |] |
| * Last Name: | Support |] |
| Organization Addre | ess | |
| Country: | United States | ▼ |
| Building/Suite/Floor: | ~ | |
| * Address 1: | 251 Little Falls Dr | |
| Address 2: | | |
| * City: | Wilmington | |
| * State: | DE | Find |
| * Zip: | 19808-1674 | |
| Contact Information | n | |
| * Email: | mmsupport@cscglobal.com | Hint |
| * Phone Number: | 800-490-9035 | Ext: |
| Alternate Phone Number: | |] |
| Fax Number: | |] |

Figure 5: Manage My User Profile

Important: ** indicates required field*

3.1.2. Set default landing page

The system defaults to opening CSC Matter Management's **ADMIN** section when you log in. To change the default landing page to another section (e.g., Matters), perform the following steps:

- 1. Select Set Default Landing Page under Personal Admin on the left of the Administraton & Preferences section.
- 2. Change the Set Default Landing Page dropdown to the page you would prefer to see at login.
- 3. Click SAVE.

| gged in as. Matter Management Support | | |
|---------------------------------------|--------------------|----------------------|
| Personal Admin | Set Default L | anding Page |
| Manage Profile | Default Home Page: | Matter Admin SAVE |
| Manage Password | | Matter Admin |
| Set Default Landing Page | | Matter Documents |
| Offline Batches | | Tasks |
| | | Matters |
| Matter Management Admin | | Notes |
| Manage My Preferences | | Organization |
| Manage Grid Filters | | Reports |

Figure 6: Change default landing page

3.1.3. Alert settings

Setting up your **Alert preferences** is critical as it determines when and how you will receive notifications from CSC Matter Management. Alerts let you know when new notes or tasks have been added to matters you have been assigned, as well as if you have been added to new matters. Alerts are also a convenient and automatic way to track system and user changes. Note that the default is for you to receive all alerts, but if alerts are disabled, *there is a risk of not being notified of an SOP document*. Review the list to determine what best meets your needs. To modify your alert settings see below:

- 1. Select Manage My Preferences under Matter Management Admin on the left of the ADMIN section.
- 2. Update the email alerts you wish to receive.
- 3. Once you click **SAVE**, all the changes will be saved and a confirmation message will appear at the top of the page.

| You | can override the default settings for Individual Matters in your Matters Area. | | |
|--------------|--|-------|--|
| | Aiert me when I am added to a matter | 0 | Apply Settings to New Matters Only |
| | Alert me when CSC Service of Process documents are added to my matters | | €3 |
| \checkmark | Alert me when transactional order documents are added to my matters | | |
| \checkmark | Alert me when other documents are added to my matters | | |
| | Alert me of any notes activity within my matters | ۲ | Apply Settings to All Existing and New Matters |
| | Alert me of any task activity within my matters | | (This will Reset All Custom Alert Settings) |
| Em Inv | ail Reminders On ▼ every 3 days Send Only One Reminder Notice | | |
| | Alert Invoice uploader when invoice is Approved. | | |
| | Alert the next Approver in the workflow when Invoice is approved by providus | 2000 | aver |
| | Alert all previous approvers when an invoice Matter gets rejected | appin | over. |
| | Alert me when an Invoice is ready for my approval | | |
| | Send Unapproved Invoice Alert | | |
| | Figure 7: Alerts | | |

Preferences have been updated.



3.1.4. Manage grid filters

Users have the ability to add filters to distinguish their matters quickly by any matter criteria. The filters can be created and managed by individual users under the **ADMIN** and the **Manage Grid Filters** link.

In addition to filtering the matters returned to the matter grid, the system also returns the appropriate data set with those matters. When creating a filter, you can select a different set of fields to be included in the grid from those displayed under your default grid settings. This can be particularly useful for users with responsibilities that span multiple workflows. Specifically, if you're looking at litigation matters on the grid, you'll see litigation fields such as court, case number, and answer date. If your filter brings back only contract matters, you'll see expiration dates and notice provisions. For business licenses, you'll see renewal dates and business locations.

The filters can be turned on or off as needed under the Matters Activity Grid, allowing users to quickly and efficiently get to the matters they need. For example, users with a client administrator role and smaller legal departments may need to see every matter within their account, though they are only responsible for a portion of these matters (i.e., subpoenas or garnishments). A custom filter can be built that allows the user to quickly toggle back and forth between all matters and the defined subset.

Filters can be designated as either public or private. Public filters can be used by other users within your organization, whereas private filters are only accessible to the user that created the filter.

3.1.5. Create a grid filter

As an example, let's create a filter that searches for documents with the text "2020" in the title. The following screenshot displays the document list with NO filters applied. To quickly find documents with the text "2020" in the title, as well as limit the view to only key pieces of information (e.g., the matter name), you can easily create a grid filter.

| olaying: 1 - 27 Results I | Limited to 1000 Records | | | | | | |
|-----------------------------|-------------------------|-------------|----------------------------------|----------------------|---------------|--------------------|--------------------|
| Document Action | ns 🖌 🗖 Grid Actions 🗸 | Show Quick | Search Grid Filter None | Show: | All Documents | from: 03/11/2019 | to: 03/10/2020 Hin |
| ŤM | 🕯 🔏 MATTER SHORT NAME | DOCUMENT ID | DOCUMENT TITLE | DOCUMENT TEMPLATE | DATE SERVED | MATTER FULL NAME | |
| | Delaware | 30227414 | 1154712001-1.xml | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227411 | D53344EM RG 529241 070220.txt | Upload Document | 03/06/2020 | Jones & Associates | |
|) [] | Delaware | 30227410 | 981 2019-12-31.txt | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227409 | 981 2019-12-31-1.txt | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227407 | Feb2020Test.txt | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227406 | 541197.txt | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227416 | 11287-066585-129202.txt | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227404 | 1154712001-3.xml | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227402 | 891 2020-02-29.txt | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227401 | 891 2020-02-29-1.txt | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227400 | Demo Test 1.txt | Upload Document | 03/06/2020 | Jones & Associates | |
| | Delaware | 30227291 | New Listing of Contacts | Contract Documents | (n/a) | Jones & Associates | |
| | Delaware | 30227405 | 1154712001-2.xml | Upload Document | 03/06/2020 | Jones & Associates | n ra a |

Figure 9: Documents list

1. Under Matter Management Admin select the Manage Grid Filters link on the left.



Figure 10: Manage Grid Filters Link

2. The screen will update to display a list of existing grid filters. Click Add to create a new grid filter.



Figure 11: Manage grid filters

3. On the **Add a Grid Filter** page, complete the following form fields:

| Add a Gri | d Filter |
|-----------------|------------|
| * Filter Name: | |
| * Description: | |
| * Module: | Select V |
| Active: | • Yes O No |
| Private/Public: | Private |

Figure 12: Add a grid filter

- Filter Name: Add a name for your filter.
- Description: Add a short description for the filter.
- Module: Decide if the search is for a matter or a document. In the example above, select documents since we're looking for specific document titles.
- Active: Select Yes if you want to be able to select this filter, and No if you want to turn this filter off.
- **Private/Public:** A private filter can only be applied by the person who created it. A public filter can be used by any individual with an account.

• Filter Criteria: Select an attribute from the dropdown list. Attributes are the fields available for the selected module (note that you must select a module before they'll populate).

| Filter Criteria | | | | | | | | |
|-----------------|------------------|---|---|-----|--------|--|--|--|
| Attribute List: | Select Attribute | | ▼ | ADD | REMOVE | | | |
| ■ { ▼ Do | cument Title 202 | 0 | } | • | ▼ | | | |

Figure 13: Filter criteria

- To filter by name, select **Document Title** and click **ADD**. The field name will appear below.
- In the box, input the filter criteria (e.g., "2020").
- To the left of the field, check the box to include the field in the search.
- To add another field to the criteria, select **AND** or **OR** from the dropdown list. Leave blank if you do not wish to include other filter criteria.

| vailable Fields | s for Display: | | * Fields Included on Grid |
|-----------------|-------------------------------|--------------|--|
| | | | Up Down Top Bottom |
| Acknowledger | ment Date [DOC_ACK_DATE] | | Document Id [DOC_ID] |
| | ment Status [DOC_ACK_STATUS | | Document Intle [DOC_IIILE] |
| Answer Date [| DOC_ANSWERDATE] | 100 " | Matter Full Name [DOC_MATTER_LONGNAME] |
| Assigned By [I | DOC_ASSIGNED_BY] | « REMOVE | |
| Author [DOC_ | AUTHOR] | | |
| CSC Doc type | Order No [DOC_RENEWAL_OR | | |
| Cause # [DOC | C_MATTER_CAUSE_NUM] | ALPHA SORT » | |
| Check in com | ments [DOC_CHECK_IN_COMM - | | |
| | | | Up Down Top Bottom |
| | | | |
| Sort By Dat | te Created [DOC DATE CREAT! V |] | |
| | • • • • • • | | |
| | | | |
| Sort Order | Ascending Descending | | |

Figure 14: Grid Display

- Grid Display: Select the field(s) that will be displayed in the grid. Highlight the fields on the left and click ADD to move them to the other column.
- Grid Order: To change the field order, use the Up, Down, Top, or Bottom links. You can also click ALPHA SORT to sort the fields alphabetically.
- Sort By: Select the field (from the list of fields you selected for your grid display) to sort by.
- Sort Order: Select if you want the sort to be Ascending or Descending.
- 4. Click SAVE.

4. Activity grids

CSC Matter Management incorporates the use of activity grids to display recent activities associated with your **Matters**, **Tasks**, **Invoices**, and **Notes**. You may access these grids by selecting the option name from the main menu bar.



Figure 15: To view a specific activity grid, select the corresponding main menu option

The activity grid below is for **Matters**.

| Ma | tters ying: 1 - 70 Results Limited | to 1000 Records | | | | | | | QUICK ACTIONS |
|----|---|-------------------|--------------------------------------|--------------------|------------|--------------------------|---|--------------------------|-------------------|
| 8 | Matter Actions 👻 | Grid Actions • St | now Quick Search Grid Filte | None | Show: All | Matters v from: (| 03/13/2019 to: 03/12 | 2/2020 Hint | REFRESH S RESET S |
| • | MATTER ID | DATE OPENED 🗣 | MATTER FULL NAME | NATURE OF CASE | CAUSE # | JURISDICTION | COURT | FIRST NAMED PLAINTIFF | |
| | 9932524 | 09/18/2019 | Oda Fillion vs. Catalina Roberge | Asbestos | 631240731 | Florida | Bay County Circuit Court | Oda Fillion | √ = |
| 0 | 9932525 | 09/18/2019 | Ryann Mahn vs. Sindy Aquila | Bankruptcy | 1549435860 | Florida | Office of the Judge of Compensation Claims | Ryann Mahn | |
| | 9932526 | 09/18/2019 | Queenie Gover vs. Lani Culbreath | Breach of Warranty | 7440212967 | Florida | Miami-Dade County Court | Queenie Gover | V 🚔 😪 🚔 |
| | 9932527 | 09/18/2019 | Jacalyn Pilling vs. Blanch Garvey | Class Action | 8156485289 | Missouri | Buchanan County Circuit Court | Jacalyn Pilling | |
| | 9932528 | 09/18/2019 | Sima Belnap vs. Lonny Brighton | Contract | 4311522139 | North Carolina | Department of Revenue | Sima Belnap | |
| | 9932529 | 09/18/2019 | Dione Habib vs. Venessa Ayars | Discrimination | 1328035030 | Virginia | Spotsylvania County General District Court | Dione Habib | |

Figure 16: Activity grid

Users can customize their grids based on personal preference (please refer to upcoming section 4.2.).

4.1. Activity grid alerts

- A red circle with an exclamation point denotes an error message.
- A yellow triangle with an exclamation point denotes an action that the user needs to take.
- A blue circle with the letter i denotes information that could be useful for the user.
- A teal circle with a checkmark denotes that an action has been successfully completed.

4.2. Customizing activity grids

4.2.1. Adjusting the date range

In the top right corner of the activity grid, you can set the date range for the grid. To adjust the time period, select new **from:** and **to:** dates by clicking the Calendar icon \blacksquare .

| rom: | 03/0: | 2/202 | | to | : 03 | 3/12/2 | 020 | Hint | REFRESH 5 | RESET C |
|------|-------|-------|-------|----|-------|--------|-----|-------|--------------------|---------|
| V | 0 | I | Mar 🛛 | 2 | 020 🔻 | | 0 | NAMED | | |
| | Su | Мо | Tu | We | Th | Fr | Sa | ITIFF | | |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | | | |
| | 8 | 9 | 10 | 11 | 12 | 13 | 14 | | V 📬 🕏 | |
| | 15 | 16 | 17 | 18 | 19 | 20 | 21 | | n c. c. | |
| | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 2 | | |
| | 29 | 30 | 31 | | | | | | | |

Figure 17: Adjusting date range

After both dates have been entered, click **REFRESH** to display your refined results. The date range reflects the following:

- For documents = date served or uploaded
- For matters and notes = date created
- For invoices = date uploaded

4.2.2. Adjusting the number of days to display in the grid

You can adjust the default number of days to display in the grid by clicking Grid Actions and selecting Customize Grid Display.





Under **Customize Amount of Data Displayed,** you may change the **Maximum Number of Days in History** to display on your grid, as well as the **Maximum Number of Records Displayed per Page.** After making changes, click **Save** to keep your changes and return to the activity grid.



Figure 19: Customize amount of data displayed

4.2.3. Choose columns and data to display in the grid

You can choose the columns and data to display in the grid by again clicking **Grid Actions** and selecting **Customize Grid Display.**



Figure 20: Grid actions

Here, you can customize the specific fields to be displayed in the grid. Simply highlight the fields you wish to be displayed from the **Hidden** column (left) and click the **ADD** to add them to the **Displayed in Grid** column (right). Similarly, you can remove fields that you don't find useful.

| Hidden | | Displayed in Grid | |
|--|------------|---|------|
| Vendor City [VENDOR_CITY_A] | » ADD » | Matter Id [MATTER_ID] Date Opened [MATTER_DATE_OPENED] | TOP |
| Vendor State (VENDOR, STATE_A) Weather Conditions [TYPE_WEATHER] What is the contract for? [WHAT_CONTRACT_FOR] | « REMOVE « | Matter Full Name [MATTER_FULL_NAME] Nature of Case [MATTER_NATURE_OF_CASE] Cause # [MATTER_CAUSE_NUMBER] Undedication [MATTER_ULPISIOTION] | UP |
| Who is hequesing the contract WHO_CONTRACT_KEQUES IC Who is the contract with? [WHO_CONTRACT_WITH] Will This Work? [TEST_NOTIFICATION] Zin Code (RETAINED COLINSEL ZIPCODE) | | Court [MATTER_COURT] | DOWN |

Figure 21: Customize grid display

4.2.4. Sorting the activity grids

You may sort your grid by any field you displayed. Simply click the field's corresponding column heading (e.g., State Served, Entity as Established, Matter Name, etc.) and CSC Matter Management will reorganize the information in ascending order, alphabetically, or chronologically based on the field selected. You may sort in descending order by clicking the column heading a second time.

| 6 | 🗋 Matter Actions 🛛 💂 | Grid Actions 🗸 | Show Quick Search Grid Filter: | None Show: | All Matters | from: 04/09/2019 📾 to: 0 | 03/11/2020 🖩 |
|---|----------------------|----------------|--|----------------|-------------|--------------------------|--------------|
| | MATTER ID | DATE OPENED 🗣 | MATTER FULL NAME | NATURE OF CASE | CAUSE # | JURISDICTION | |
| | <u>4228323</u> | 03/11/2020 | Billing Admin | Asbestos | 987577-7 | Delaware | <u> </u> |
| | 4228322 | 03/11/2020 | Civic LLC. vs.CSC Matter Testing INC. | Asbestos | 987413-4 | Delaware | |



4.2.5. Run a grid filter

Grid filters can be used throughout CSC Matter Management as a simple way to distill screens down to certain types of data or documents, and control how the data is displayed. Please refer to section 3.1.4. for details on creating a filter before applying it. To apply a filter to your grid, follow the instructions below.

- 1. To apply a grid filter, go to the activity grid where you would like to apply a filter. The example below is from the **Documents** grid.
- 2. Select the grid filter name from the dropdown list in the header, on the right side of the screen.
- 3. Optionally, set date parameters by selecting a to: and from: date to the right of the grid filters.
- 4. Click **REFRESH** 5 when ready to proceed. The results will be displayed in the activity grid.



Figure 23: Run Grid Filter

4.2.6. The track tool

The **Track** tool displays an activity audit for the information that you're viewing in the activity grid. For example, identify which users have viewed or modified a document and the date and time of the action. You can track information by clicking the **check box** next to the record that you'd like to track within the grid.

Tip: *Multiple records can be tracked simultaneously from the grid by selecting multiple check boxes.*

Then click **[Document/Matters/Notes] Actions** and select **Track Selected [Document(s)/Matters/Notes]** from the dropdown list. Note that the wording depends on the type of activity grid you're viewing. The current example is for the **Matters** grid.



Figure 24: Track selected [Documents/Matters/Notes]

The tracked actions will appear in a tabular format, where you can sort and print the data.

| Aatter Trac | king (<u>Show all</u> | results) | Date: 12/13/2019 | to: 03/1 | 2/2020 Activ | ity Type: ALL | 9 | • |
|---------------|------------------------|-------------------------------------|--------------------|------------|--------------|----------------------------|-----------------|-------|
| MATTER ID | DATE OPENED | MATTER FULL NAME | NATURE OF CASE | CAUSE # | JURISDICTION | COURT | FIRST NAMED PLA | INTIF |
| 9932526 | 09/18/2019 | Queenie Gover vs. Lani Culbreath | Breach of Warranty | 7440212967 | Florida | Miami-Dade County Court | Queenie Gover | |
| USER NAM | ΛE | ACTION | | | DATE/T | IME | | |
| Billing Admin | (| Viewed ma | itter | | 03/12/202 | 20 10:26 AM EE | T | |
| Vincent Gam | <u>ıbini</u> | Viewed ma | itter | | 02/26/202 | 20 12:56 PM ES | ST | |
| Vincent Gam | <u>ıbini</u> | Matter mar | ked as read | | 02/26/202 | 20 12:56 PM ES | ST | |
| Billing Admin | L | Viewed ma | itter | | 02/26/202 | 20 11:29 AM ES | т | |
| Billing Admin | | Viewed ma | itter | | 01/29/202 | 20 11:34 AM ES | T | |
| Billing Admin | 1 | Matter not | e added | | 01/23/202 | 20 02:24 PM ES | ST | |
| Billing Admin | 6 | Viewed ma | itter | | 01/23/202 | 20 02:22 PM ES | ST | |

5. Documents

5.1. The documents activity grid

The **Documents** grid displays documents that have been uploaded to CSC Matter Management. From the Documents grid, quickly check to see if there are new documents or SOP for review.

| uments | | | | | | | | | |
|------------------------------------|----------------------------------|-------------|----------------|-------------------|----------------|--------------|---------------|----------|------------------|
| ing: 1 - 50 <u>Next</u> Result | ts Limited to 1000 Records | | | | | | | | |
| Document Actions | Grid Actions | | | | Shaw Quilde Sa | None V | All Documents | ▼ 6 04/* | 1/2019 📾 04/10/3 |
| Document Actions | Gild Actions | | | | Show Quick Sea | | Show. | nom: | to. |
| T M 📦 | CSC DOC TYPE | DOCUMENT ID | NATURE OF CASE | DOCUMENT TITLE | DATE SERVED \$ | STATE SERVED | ANSWER DATE | AUTHOR | |
| | Answer | 10548960 | Environmental | Summons/Complaint | 03/10/2020 | (n/a) | 03/31/2020 | (n/a) | 1 12 23 23 |
| | Agreement | 10548959 | Environmental | Answer | 03/10/2020 | (n/a) | 15 | (n/a) | D E16 - |
| | | | | | | | | | |

Figure 26: Documents grid

The **Documents** grid displays documents that were served or uploaded within the default date range specified in the top right-hand corner of your screen. Important icon links within the grid include the following:

- View a document
- Identifies a document that currently contains a note, which you may edit
- Add a note to a document that doesn't yet contain a note
- T View an accompanying transmittal page (CSC uploaded)
- W View document with accompanying transmittal page
- View and edit document information
- 🕞 SpeedShare menu
- 💼 Go to org folder for this matter

5.1.1.Filtering

Users have the ability to create and apply filters to distinguish documents by any document criteria. The filters can be created and managed by individual users under **ADMIN**, via the **Manage Grid Filters** link. For additional information on managing grid filters, please review sections 3.1.4. and 4.2.5.

5.1.2. View a document

When you click the **view document** icon [], your document will appear in a new window for your review.



Figure 27: View document

5.1.3. View an accompanying transmittal page

As a registered agent, CSC handles SOP for its customers, including processing electronic SOP and delivering SOP through CSC Matter Management. These documents have a transmittal page that can be viewed by clicking the \underline{T} icon and then the **customer name** link.

5.1.4. View and edit document information



Figure 28: Document information



Figure 29: Document actions, acknowledge document(s)

5.1.5. Acknowledge document(s)

Acknowledging SOP can be done by clicking the check box next to the SOP that you'd like to acknowledge within the grid. Then click **Document Actions** and select **Acknowledge Document(s)** from the dropdown list.

After you select **ACKNOWLEDGE**, in the pop-up window that appears, you will receive a confirmation message.

| Acknowledge Document(s) | |
|--|--------|
| Clicking "Acknowledge" will acknowledge the following SOP Document(s |): |
| Document Amended Counterclaim (john vs. sashi) will be acknowledged. | |
| ACKNOWLEDGE | CANCEL |
| | |

5.2. SpeedShare

SpeedShare is meant to expedite the typical workflow for processing SOP and new documents. Click the **SpeedShare** icon to open the **SpeedShare** process window.

Since the document is *already* associated with a matter, you'll be able to access the SpeedShare tabs. Note that you're unable to change the matter association in SpeedShare. This message will appear at the top of the page:

Document 29654861 is already associated with Matter 9932526. This relationship cannot be edited in speedshare. Figure 31: Document and matter relationship

The SpeedShare tabs display the six key elements relating to the document and matter:

- Matter Summary
 Notes
- User Access
- Tasks
- 1000
- Pleadings
- All Documents

| Matter Summary | User Access | Tasks | Notes | Pleadings | All Documents | |
|--|--|----------------|------------|--------------------|----------------------|--|
| | | | | | | |
| Sharing Document: To move this Matter | "Answer" (29654861) click <u>HERE</u> . | Matter Short N | ame: "Quee | nie Gover vs. Lani | Culbreath" (9932526) | Folder Location: /Matter Folders/New Matters |

Figure 32: SpeedShare tabs

5.2.1. Matter summary

Within **Matter Summary** (the first step in the process), you can modify or add any pertinent information with regard to the matter. Click **Edit** to change or add information within these fields. Any information added will be retained and displayed upon receipt of any subsequent pleadings served in the matter. Click **Save** after making any appropriate changes or additions.



Figure 33: Matter summary

5.2.2. User access

The **User Access** tab allows matter admins to add users or user groups to the matter with one simple step. Select the intended recipients from the respective **Users/Groups** and **Vendor Users** lists on the left, add them to the list of **Users/Groups with Access**, then designate their access levels.

Tip: Users and groups are populated in the system via the **ADMIN** tab. Under **ADMIN**, client administrators can set up a user or group in the system via **Manage Users** and **Manage Groups**.

- Matter Admin has full control over the matter; they can add, remove, or modify users, documents, and data for the
 matters they have access to.
- Matter User can do everything a matter admin can do, except add, remove, or modify users.
- Matter Viewer can only view the matter users, documents, and data.
- Vendor Matter Administrator this user has the same access as a matter admin, however, access to financials and administration is limited.
- Vendor Matter Viewer this user has the same access as a matter viewer, however, access to financials and the
 administration folder is limited.
- Vendor Matter User this user has the same access as a matter user, however, access to financials and administration is limited.

Once complete, click **SAVE ASSIGNMENTS** at the bottom of the screen. An email notification will be sent to each recipient that contains information about the matter and a link to it. From the **User Access** screen, you may add a personal message to this notification by entering text in the **Comments** field. In addition to being included in the email, these comments will also be entered as a note for the matter.

| haring Document: <u>"Answer" (29</u> o move this Matter click <u>HERE</u> . | 854861) Maller Short Na | ame. "Queenie Gover vs. Lani Culbrea | attr" (9932526) Folder Location | I. Maller Folders/New Mallers |
|--|-------------------------|--------------------------------------|------------------------------------|---|
| Users/Groups | ADD >> | Users/Groups with A | ccess | TINISITSI LEUSIANE |
| Select From Users/Groups | SS REMOVE | USER/GROUP NAME | ORGANIZATION | ACCESS LEVEL |
| Users | | Billing Admin | E-billing Demo Acct | Matter Admin 🔻 |
| Accounts Payable Andrea Jonaitis - Demo | * | Vincent Gambini | E-billing Demo Acct | Matter Admin 🔻 |
| Barb Budgick Chris Moritz Dofault Landing Page Department 5 Reviewer | | Gamishment Team | E billing Demo Acct | Matter Admin 🔻 |
| Groups | | Comments | | |
| Contract Review Group Document Review learn Foreclosure Group Holiday Group Kendric MM RTANYA12 Linkpoint Group | * | | | |
| Vendor Users: select from vendor Users | | Comments will be included in the E | mail Notification to the Users the | at are Added to the Matter and/or Document SAVE ASSIGNMENTS |
| | | | | |

5.2.3. Tasks

The **Tasks** tab can be used to create and assign tasks to any of the users who have been granted access to the matter (including you).

| Sharing Documer | t: " Slip and Fa | ll Original | Incident report" | (29814224) | Matter Short Name | : "Queenie Gover vs. | Lani Culbreath" (99 | 27276) Folder L | ocation: /Matter | |
|--|-------------------------------|--|---------------------------------|--------------------|-------------------|--------------------------------------|----------------------------------|--|------------------------------|-----------|
| Folders/New Matt | ers er clickHERE. | | | | | | • | And a state of the | | |
| | | | | | | | | F | FINISH SPEEDS | HAR |
| | | | | | | | | | | |
| Tasks | | | | | | | | | | |
| Tasks | | | | | | | | | | |
| Tasks Displaying: 1 Results | Limited to 1000 Rec | ords | | | | | | | | |
| Tasks Displaying: 1 Results | Limited to 1000 Rec | ords | | | | | | | | |
| Tasks Displaying: 1 Results 🕑 Task Action | s Limited to 1000 Rec | ords rid Actions | • | | | View: | All Tasks V | tatus: All | ▼ REFRES | S HS |
| Tasks Displaying: 1 Results Displaying: 1 Results Task Action PRIORITY | Limited to 1000 Rec Is T G | ords rid Actions IE → TA | • 5K | ► AS | SIGNED TO | View: | All Tasks St | tatus: All | ▼ REFRES | нΟ |
| Tasks Displaying: 1 Results Task Action • PRIORITY Low | s Limited to 1000 Red Is | ords rid Actions IE ► TA Mail (| • 5K priginals to the cou | ► AS urt. Ian T | SIGNED TO | View: DATE ASSIGNED 03/16/2020 | All Tasks St CREATED BY MM Demo | All All STATUS Open | REFRES TASK TYPE N/A | эн O Ф |

Figure 35: Tasks

To create a new task, click Task Actions and select Create New Task.

When the **Add & Assign Task** window appears, enter a description of the task, a due date, and the user responsible for completing the task. The **Send Reminder** field enables you to send an automatic email notification of the pending due date to the user any number of days prior to the deadline.





5.2.4. Notes

The **Notes** tab allows you to add and maintain public and private notes. Private notes can only be viewed by the user who entered them. Notes can be associated with specific documents received for the matter or to the matter as a whole.

| Matter Summary | User Access | Tasks Note | s Pleadii | ngs All Do | ocuments | | | | |
|--|-------------------|--|-----------------|---------------------------------|-------------------------|-------------|----------------------------------|--|--------------|
| haring Document: <u>"Answ</u> | rer" (29654861) M | latter Short Name: "G | ueenie Gover vs | Lani Culbreath" | (9932526) Folder | Location: / | Matter | | |
| o move this Matter clickH | ERE. | | | | | | | FINISH | PEEDeuado |
| | | | | | | | | FINISH | I SPEEDSHARE |
| Intec | | | | | | | | | |
| Votes | | | | | | | | | |
| Votes | | | | | | | | | |
| Note Actions | Grid Actions | | | | View | Note D | etails and Note Co | ontents 🔻 | REFRESH O |
| Note Actions | Grid Actions | DATE CREATE | ED ►LAS | T EDIT DATE | View ▶ PUBLIC/PF | Note D | etails and Note Co | ontents ▼ | |
| Note Actions DOCUMENT/MAT Matter: Queenie Gover | Grid Actions | DATE CREATE 01/23/2020 12:00 / | ED LAS | T EDIT DATE 2020 12:00 AM EE | View PUBLIC/PF T Public | Note D | etails and Note Co PRIVILEGED No | ontents ▼ ► CREAT <u>Billing Adv</u> | REFRESH S |



| | */ | ndicates a required field |
|---------------------|----------------------------------|---------------------------|
| Note Screen : | Note Entry V | |
| Matter Name: | Queenie Gover vs. Lani Culbreath | |
| Attach to Document: | | • |
| * Public/Private: | Private Public | |
| * Note Privileged: | 🔍 Yes 💿 No | |
| | | |
| * Note Description: | | |
| | | 1 |
| | | |

Figure 40: Create Note

To add a note, select **Add Note** under **Note Actions**.

When the **Create Note** window appears, input the following information:

- Select the appropriate **Note Screen** from the dropdown list. A **Note Screen** is a collection of data fields that capture key information about the note being created.
- Select the document you would like associated with the note.
- Select whether the note is **Public** or **Private**.
- Select whether the note is **Privileged** or not.
- Add a description of the note.

Tip: If you mark the note **Private**, no one else will be able to view the note.

5.2.5. Pleadings

The **Pleadings** tab displays documents stored in the **Pleadings** folder of the matter (pertaining to this particular matter). Here, you're able to view documents, upload additional documents, download documents, track documents, add notes, and modify document details.

| matter Suttitidiy | User Access | Tasks Notes | Pleadings All Do | ocuments | | |
|---|---|--|-------------------------------------|--|--|-------------------------------------|
| aring Document: <u>"An</u> move this Matter clic | swer" (29654861) Matter S k HERE. | Short Name: "Queenie Go | ver vs. Lani Culbreath" (9932 | 2526) Folder Location: /Matter | r Folders/New Matters | |
| | | | | | FINISH | SPEEDSHAR |
| leadings | | | | | | |
| splaving: 1 - 3 | | | | | | |
| | | | | | | |
| Matter Document / | ctions 🚽 🗖 Grid Ac | tions 👻 | | | | |
| Matter Document | Actions - Grid Ac | | | | COURT | CAUCE |
| Matter Document A | Actions 🔸 🗖 Grid Ac | DATE SERVED | DOCUMENT ID | DOCUMENT TITLE | COURT | CAUSE # |
| Matter Document / | Actions - Grid Actions (CSC TRANSMITTAL II) | D DATE SERVED | DOCUMENT ID | DOCUMENT TITLE | COURT (n/a) | CAUSE # 7440212967 |
| Matter Document / | Actions - Grid Actions (n/a) | titions - D DATE SERVED 01/16/2020 12/18/2019 | DOCUMENT ID 29843598 29654861 | DOCUMENT TITLE Motion to Dimiss with Prejudice Answer | COURT (n/a) New Castle County Court of Common Pleas | CAUSE # 7440212967 7440212967 |



5.2.6. All documents

The **All Documents** tab displays all documents for a matter. For example, if a matter has 100 documents that are organized into five folders, the **All Documents** tab allows the user to view all 100 documents across folders in one grid.

5.2.7. Acknowledge document(s)

SOP can also be acknowledged in SpeedShare within the **Pleadings** and **All Documents** tabs. Follow the same steps described in section 5.1.5. by clicking the **check box** next to the SOP you'd like to acknowledge within the grid. Then click **Document Actions** and select **Acknowledge Document(s)** from the dropdown list.

5.3. Document actions menu

The following actions are accessible from the **Document Actions** menu:

| Upload D | ocument | | |
|-----------|-------------------|------------|-----|
| Bulk Uple | oad Documents | | ITL |
| Downloa | d Selected Docume | ent(s) | |
| Email Do | cument(s) | | |
| Replace I | Document | | on |
| Add Cop | y of Document | | |
| | | | |
| Cancel C | heck Out | | _ |
| Check In | 1 | | |
| Check O | ut | | |
| View All | Versions | | |
| | | | |
| Mark Sel | ected Documents / | As Read | |
| Mark Sel | ected Documents / | As Unread | |
| Delete S | elected Documents | ; | |
| Archive S | Selected Document | ts | |
| Track Se | lected Documents | | |
| Search F | or Documents | | |
| Copy Do | cuments to Matter | | |
| Move Do | cuments to Matter | | |
| Copy Do | cuments to Knowle | edge Banks | |
| Change I | Document Templat | e | |
| Batch Ch | ange Document Te | emplate | |
| Acknowle | edge Document(s) | | |
| | | | |
| Upload A | ttachment | | |

Figure 42: Document actions

- Upload Document upload a single document to CSC Matter Management
- Bulk Upload Documents upload two or more documents at once to CSC Matter Management
- **Download Selected Document(s)** after adding a check mark to the desired documents, click this to download them to your local computer
- Email Document(s) this allows you to email selected documents to a recipient(s)
- Replace Document replace an uploaded document with a document on your local system
- Add Copy of Document create a copy of the document within CSC Matter Management
- Cancel Check Out cancels a request to check out the current version of a document to make changes; makes the document available for editing by other users
- Check In allows you to upload a new version of a document or load the previous version of a document back into the system
- Check Out a user can check out the current version of a document, make changes, and check in the updated document (document will be locked for editing by other users while checked out)
- View All Versions enables you to see all existing versions and subversions of a document; old document versions are only removed when they're overwritten
- Mark Selected Documents As Read this will mark all selected documents as read
- Mark Selected Documents As Unread this will mark all selected documents as unread
- Delete Selected Documents this will delete all selected documents
- Archive Selected Documents archiving allows users to maintain documents for their historical records, while also keeping outdated content separate from current content. Administrative users can select Archive Selected Document(s) from the Documents grid, the Documents grid within a matter, and the Document function within SpeedShare.

Important: Archived documents are stored under a matter detail's grid titled Archived Documents. Any user with access to the matter can access the archived documents. The Archived Documents grid displays all archived documents associated with the matter. The grid will display the user's customized grid settings of document folders within the matter, in addition to a column indicating the former folder location of the document. Any documents that might have been accidentally archived can be restored.

- Track Selected Documents displays any user activity for the selected document
- Search for Documents prompts you for document search parameters
- Copy Documents to Matter copy the selected document(s) to the matter of your choice
- Move Documents to Matter move the selected document(s) to the matter of your choice
- Copy Documents to Knowledge Bank copy the selected document(s) to the knowledge bank
- Change Document Template administrators can select a different document template to associate with the selected document
- Batch Change Document Template administrators can select a different document template to associate with the selected documents (two or more)
- Acknowledge Document(s) users with acknowledgment rights to a document can acknowledge service of
 process documents

5.4. Uploading a new document

It's recommended that you upload documents to CSC Matter Management immediately upon completion or receipt to ensure efficiency. There is no limit to the number of documents you can upload. As you create documents in Microsoft[®] Word or receive documents via email, follow these steps to upload them into CSC Matter Management.

5.4.1. Uploading steps for all document formats

- 1. From the Documents grid, click **Document Actions** and select **Upload Document**.
- 2. The **Upload Document** window will appear. In the **Upload to Matter Field**, begin typing part of the matter name. As you type, a full-name matching list appears. Select the appropriate matter from the list provided.

| | * Upload to Matter: | | | |
|----------|---------------------|--|---------|----------|
| | | Figure 43: Upload to matter field | | |
| Tip: You | can enter three c | r more characters in the matter name to return p | ossible | matches. |
| | | | | |

3. Double-click on the document name.

| * Document: | Choose File | No file chosen | <u>Hint</u> |
|-------------|-------------|----------------|-------------|
| | | | |

Figure 44: Upload to matter field, browse for file

4. Type the **Document Title** as you want it to appear in CSC Matter Management.

| * Document Title: | |
|-------------------|--|
| | |
| | |

Figure 45: Document title

5. Complete the remaining applicable fields in the Upload Document screen. Note that you can upload new copies of a document for the purpose of storing multiple versions at various stages of drafting and finalization. When you upload a document from the Document menu or from the document grid within a matter, you have the option to Add Copy to Knowledge Bank and rename it. The document copy is automatically assigned a unique document ID.

| opioud Document | | |
|---------------------------------------|---------------------------------|---|
| | | |
| You must select a Matter, Knowled | lge Bank or both. | |
| * Upload to Matter: | | 1 |
| * Upload to Knowledge Bank: | Please Select V | |
| | | |
| * Document: | Choose File No file chosen Hint | |
| | DOCUMENT DETAILS | |
| | | |
| * Document Title: | | |
| | | |
| | | |
| | | |
| Document Description: | | |
| Document Description: | | |
| Document Description: | ® Date: | |
| Document Description: | © Date: | |
| Document Description: Answer Date: | Date Days | |

Figure 46: Upload document window

6. Click Upload.

7. Once the document has been uploaded, you'll be prompted to upload more documents. Click **Yes** to upload more documents, or **Close** if finished.

Tip: Once the document has been uploaded, any user or group listed on that matter will receive an email notification that a new document has been uploaded. Subsequently, they can immediately access the document.

5.5. Printing and saving documents

Printing and saving documents from CSC Matter Management is simple. First, open the document by clicking the **View Document** icon in within the document grid. The document will then open in Adobe[®] Acrobat. You may print the document by clicking the **Printer** icon in the Adobe toolbar. You may also save the document by clicking the **Save** icon in the Adobe toolbar.



Figure 47: Adobe print and save buttons

5.6. Downloading documents

You may download one or more document(s) from the document grid by following the steps below:

- 1. Select the checkbox(es) for the corresponding document(s).
- 2. Choose Download Selected Documents from Document Actions.
- 3. Click **HERE** in the confirmation window.



Tip: *If* you select more than one document to download, the system will generate a zip containing the documents to be downloaded.

6. Matters

6.1. The matters activity grid

Select Matters from the MATTERS & SOP dropdown to access the matters grid.

| MY DASHBOARD ENTITIES | MATTERS & SOP ORDERS & RES | ULTS DOCUM | ENTS CALENDAR RE | PORTS FORMS & TOO | LS ADMIN | | | | |
|--|----------------------------|-------------|-------------------------|-------------------|--------------------------|----------------------|-----------------|---|-------------|
| Matters | Matters | | | | | | | Q | UICK ACTION |
| hisplaying: 1 - 50 <u>Next</u> Results Limitec | Tasks | | | | | | | | |
| 💼 Matter Actions 🖌 🗖 | Notes | Show | Quick Search Grid Filte | er: None Show: | All Matters 🛛 🔻 | from: 01/02/2019 to: | 03/10/2020 Hint | | RESET C |
| MATTER FULL NAME | Organization MySOP | DESCRIPTION | COURT | DATE OPENED 🗢 | FIRST NAMED DEFENDANT | NATURE OF CASE | ENTITY NAME | CREATED BY | CLIEM |
| Use: [1] vs. Case: [1] | Agent Addresses | | U.S. District Court | 01/19/2020 | Case: [1] | Asbestos | (n/a) | CSC | (n/a) |
| Wakefield vs. PHH Cross | Transiele vs. 1 THT Closs | - | | | a second second second | | | and the second se | |



This activity grid allows you to quickly check to see if new matters have been added to CSC Matter Management. By default, the matters grid is sorted chronologically according to the date that the matter was opened. Important links within the grid include:

- Add or view matter notes
- A matter that currently contains a note, which you may edit or add to
- Add a note to a matter that doesn't yet contain a note
- 🚔 View or edit matter information
- 🗟 SpeedShare menu
- 🖶 Go to org folder for this matter

Tip: For more information on the SpeedShare menu and its function, please refer to Section 5.2, "SpeedShare."

From the matters grid, select from a number of matter actions by clicking the Matter Actions menu.



Figure 50: Matter actions menu

6.1.1. Create a new matter

Select **Create a New Matter** from the **Matter Actions** dropdown. You'll be prompted to complete the matter details form. Note that when creating a new matter, client administrators can restrict user access to specific templates. If the user has access to matters outside of the granted template permissions, the user will be able to see the matter. The client administrator can set up and manage these restrictions under **Admin** then **Manage Permission Sets**.

6.1.2. Navigating within a matter

To navigate within a matter, click the matter name or the **View/Edit** icon **F** from the matters grid. When the matter opens, a navigation pane appears on the left, with the matter summary on the right.

| Matter Files | Matter Summary | |
|--------------------|--|---|
| Elle Cabinet | | Matter Source: Created in CSC Matter Management Application |
| Main Drawer | | DOWNLOAD TO EXCEL EDI |
| Depositions | MATTER SUMMARY | |
| Correspondence | Matter Short Name: Wakefield vs. PHH Cross Claim | |
| Discovery | Matter Full Name: Wakefield vs. PHH Cross Claim | |
| Matter Details | Matter Description: | |
| Summary | Date Opened: 01/13/2020 | |
| Tasks | File/Matter #: 19-21469 | |
| Notes | First Named Plaintiff: Wakefield | |
| Contacts | Entity Name: | |
| CSC Orders | First Named Defendant: PHH Cross Claim | |
| Workrooms | Cause #: 148631473-48 | |
| Notifications | Court: Miami-Dade County Court | |
| Archived Documents | Jurisdiction: Florida | |

Figure 51: Matter summary

To work with data outside CSC Matter Management, click **DOWNLOAD TO EXCEL.** You'll be given the option to download the data in a vertical or horizontal format to save it to your local computer. To navigate the matter, click the appropriate link on the left side of your browser. These links include:



Figure 52: Matter summary

- Pleadings All SOP received by CSC is put here.
- Depositions, Correspondence, Discovery For internal use.
- Summary Key information pertaining to the matter as a whole.
- Tasks Tasks that have been assigned to users on the matter.
- Notes Notes that have been added to the matter.
- Contacts Contacts that have been created for the matter.
- Events Events that have been created for the matter.
- CSC Orders Transaction orders you place with CSC will appear here.
- Email Contents If you use CSC Matter Management's email integration feature, you can transfer messages automatically from your email into matters.
- Workrooms Workrooms that have been created for the matter.
- Notifications Send notifications to users when actions or events take place inside CSC Matter Management.
- Archived Documents As users upload new copies of documents to the CSC Matter Management system, they are given the option to archive older versions of the document.
- **Financials** Financial data recorded pertaining to the matter, including the financial summary, payments, budgets, reserves, and invoices.
- Administration This section is used to configure user access, customize email alert notifications, and merge matters. It includes User Access, Vendor Association, Customize Alerts, Timekeeper Association, Merge Matter, Relate Matter, Track Matter, Change Matter Template, and Budget Administration.

6.2. Uploading documents to the matter

- 1. Click the matter name or the **View/Edit** icon 🚔 from the matters grid.
- 2. Within the left navigation window, select the folder in which the document should be uploaded (e.g., Pleadings, Deposition, Correspondence, or Discovery).



Figure 53: Matter document main drawer

- 3. Select Upload Document(s) from the Matter Document Actions list.
- 4. Follow the instructions described in Section 5.4.1.
- 5. The uploaded document is displayed in the folder you selected and is immediately available to all users on the matter.

| splayin | ng: 1 - 2 | | | | | | |
|---------|-----------------|--------|-----------------------|-------------------------------|------------|--------------|-----------------------|
| | | | | | | | |
| | Matter Document | Action | s 🖕 🗖 Grid Actions | - | | | |
| _ | | | | | | | |
| (e) | | | DOCUMENT TITLE | COUDT | | DATE CREATED | CCC DOC TVDE |
| | TM | Ť | DOCUMENT TITLE | COURT | ANSWERDATE | DATE CREATED | CSC DOC TIFE |
| | T M V | | Affidavit/Declaration | New Castle County Recorder | 03/05/2019 | 01/14/2019 | Affidavit/Declaration |

Figure 54: Documents in selected folder

As you upload new copies of documents to the CSC Matter Management system, you have the option to archive older versions of the document. This enables you to maintain documents for historical records, but also archive the documents so there's no confusion over which document is the current version.

Any user with access to the matter can access **Archived Documents**, which displays all archived documents associated with the matter.

6.3. Editing matter summary information

The matter Summary page resides under Matter Details within the navigation pane.



Figure 55: Matter summary

To edit the matter's summary information, follow these steps:

- 1. Click the matter name link or the View/Edit icon on the Matters Grid.
- 2. Click EDIT; the MATTER SUMMARY fields will now be displayed in an editable format.

| Matter Summary | |
|---|--|
| | Matter Source: Created in CSC Litigation Management Syst |
| | DOWNLOAD TO EXCEL ED |
| MATTER SUMMARY | |
| Matter Short Name: Clark W. Wrigley vs. CANRC | |
| Matter Full Name: Clark W. Wrigley vs. CANRC | |
| Matter Description: | |
| Date Opened: 01/17/2019 | |
| File/Matter #: | |
| First Named Plaintiff: Clark W. Wrigley | |
| Entity Name: | |
| First Named Defendant: CANRC | |
| Cause #: 568932 | |
| Court: New Castle County Recorder | |
| Jurisdiction: Delaware | |
| Jurisdiction Type: | |
| Nature of Case: Environmental | |
| Previous File/Matter #: | |
| Opposing Counsel: | |
| Outside Counsel: | |
| Primary Attorney: | |
| Represented Party: | |
| Represented Party Designation: | |
| Insured?: | |
| Material Facts: | |
| Strategy: | |
| Amount Budgeted: | |
| Risk Amount: | |
| Risk Level: | |
| Created By: Tiffany Bockhorn | |
| | EDIT PRIM |
| | |

Figure 56: Editable MATTER SUMMARY fields

3. Make your changes and click **Save**; the changes are now accessible by all users with access.

6.4. Notes

A matter's **Notes** section is accessible via the **Add/View Matter Notes** icon \exists , as well as from the **Matter Details** list. The quickest way to add a note is to click the **Add/View Matter Notes** icon \exists for the corresponding matter on the right side of the **Matters Grid.** Otherwise, to add and view a **Note** from the **Matter Details** list, follow these steps:

- 1. Click the matter name link or the View/Edit icon on the Matters Grid.
- 2. From the left, choose **Notes Notes** under Matter Details.

6.5. The notes activity grid

The **Notes Grid** allows you to quickly check to see if new notes have been added to CSC Matter Management. By default, the **Notes Grid** is sorted chronologically according to the date that the note was created (last edited).

| Displa; | ying: 1 - 2 Results Limited to 1 → Note Actions → | 000 Records □ Grid Actions → <u>Show</u> | v Quick Search Show: | Matter Notes View | All Notes V |
|----------|--|---|------------------------|-------------------|----------------|
| | DATE CREATED | NOTE DESCRIPTION | CREATED BY | LAST EDIT DATE 🗘 | PUBLIC/PRIVATE |
| | 03/10/2020 | Take a look at docs | Tim Holden | 03/10/2020 | Public |
| | 03/10/2020 | Sent copy of documents to counsel | o <u>Tim Holden</u> | 03/10/2020 | Public |
| ortan | t links within the gr | Fi id include: | gure 57: Notes grid | | |
| Viev | v or edit note inform | ation 🚉 S | peedShare menu | | |
| . | | information 🚔 N | lattar. | | |

Tip: For more information on the SpeedShare function, please refer to Section 5.2, "SpeedShare."

7. Searching

7.1. Quick search

Quick Search allows users to quickly search for matter or document-level attributes from any screen in CSC Matter Management. Find it in the upper right corner of every screen, immediately accessible from the CSC Matter Management toolbar. When a user searches for matters, the search results include a link that gives users immediate access to the corresponding matter(s). Note that matter and document search results are limited to 999 matches.

Matter results are sorted by the most recent matter creation date and will include information on the **MATTER ID, MATTER SHORT NAME, MATTER FOLDER, DATE OPENED, JURISDICTION, CAUSE #,** and **LEGACY ID.** Document results will be sorted by the most recent document creation date and will include information on the Document ID, Document Title (allowing you to link to and view the document), the Original Document File Name, the Date Created, and the Matter Short Name.

| CSCNavigator® | Matters Documents | 📄 Send Us Feedback 💄 Matter Management 💌 |
|---------------|-------------------------|--|
| | Figure 58: Quick Search | |

CSC also provides an option to set a default view for Document Quick Search or Matter Quick Search using **Organization Preferences** under **Admin**. To search for matter or document information using this field, follow these steps:

1. Select the appropriate radio button, then in the search field, enter a keyword that is specific to the matter you wish to view (e.g., "Smith" or "Texas"). Click **Submit.**

| Matters | O Documents | ٩ |
|---------|-----------------------------|---|
| | Figure 59: Quick search box | |

2. To view the resulting matter or document that matches your criteria, click the **Matter/Document** name link in the results.

| SEARCH RESUL | TS | | | (Note: Quick Searc | h only returns the first 1000 | results.) |
|------------------------|----------------------------|-------------|-------------|--------------------|-------------------------------|-----------|
| Matters | | | | | | |
| Customize Grid Display | Download Grid to Excel | | | | | |
| MATTER ID | MATTER SHORT NAME | Folder Path | DATE OPENED | JURISDICTION | CAUSE # | LEGACY ID |
| 3738934 | Clark W. Wrigley vs. CANRC | New Matters | 01/17/2019 | Delaware | 568932 | (n/a) |
| | | | | | | |

Figure 60: Quick search results

Tip: The Quick Search is a "contains" search, so you can enter any part of the search criteria and the system will return results matching your criteria.

7.2. Searching for specific results

There are times you'll need to locate specific information within matters or documents. In addition to using the simple search, the activity grids also provide the ability to search based on specific fields and information. To search from an activity grid, follow these steps:

| Matter Actions | • | Grid Ad | ctions |
|------------------|---------|---------|--------|
| Create a New Ma | atter | | |
| Delete Selected | Matter | (s) | |
| Rename Selecte | d Matt | er(s) | |
| Search For Matte | ers | | |
| Track Selected N | latter(| s) | |

Figure 61: Search for matters

- 1. Click the grid you want to view from the main menu (e.g., Documents, Invoices, Matters, or Notes). Within the **matters grid**, for example, click **Matter Actions** then **Search For Matters**.
- 2. Enter your search criteria and then click Search.
- 3. A list of matters containing the search term is displayed. To access a result, click the name of the matter.

| abe complete one of more fields | and click searc | h to v | iew Matters | that me | eet your search criteria. |
|---------------------------------|-----------------|--------|-------------|---------|---------------------------|
| Date Opened: | 11/11/2019 | | 03/10/20 | 20 🔳 | Hint |
| Adjuster Reference Number: | | | Ă |] | |
| Amount Budgeted: | = | • | | | |
| Billing Entity Number: | | | |] | |
| Broker: | | | |] | |
| Cause #: | | | | Hint | |
| | | 1 | | | |

Figure 62: Matters search criteria

8. Reports

CSC Matter Management's **Report Engine** allows you to create professional, ad hoc reports on your matters right from your web browser.

8.1. Report types

There are currently 13 report types, all of which are fully customizable:

- Contacts Report report on the contacts attached to a matter.
- Documents Report report on documents for a single matter or across matters.
- Events Report report on the events attached to a matter.
- Invoices Report report on invoices received or entered.
- Line Items Report run a report using Invoice Line Item criteria and results such as reports by Task Codes.
- Matter Report report across your matters using custom-selected criteria based on data entered for such matters.
- Notes Report report on notes in your matters.

- Payments Report report on payments attached to a matter.
- Reserves Report run a report and include your reserve or budget amount to compare to payments.
- Tasks Report report on tasks that have been assigned to users.
- UnRead Docs Report user can track documents that have not been read by any user within the organization, and ensure all their documents have been read.
- Users Report report on users who have access to a matter.
- Vendors Report report on vendors.

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8.2. Creating a report

To create a customized report, follow the steps below:

Tip: If you save a report as public, all users will be able to see and run the report from the **Reports Grid** (the results will still be limited to the matters and information the user has access to, but the user can run the report criteria). If you save a report as private, no other users will be able to see the report.

- 1. To create a report, click **Reports** from the main menu.
- 2. Under Reports Actions, click Add Report.



Figure 63: Add report

3. Under Step 1 on the Reports screen, enter your search criteria, then when completed, click CONTINUE TO STEP 2.

Tip: You may enter or select multiple criteria for a single report. Entering criteria into the fields in Step 1 will limit your results based on that criteria. If you would like a report on all your matters, do not enter any criteria into Step 1.

| Report Type: Document 🔻 |] |
|--|---|
| Include Archived Documents?: O Yes N | 0 |
| No selection is required, but folder selection belo | w will streamline the scope of this report. |
| Matter Folders | |
| No criteria is required, but use the fields below to | streamline the scope of this report. |
| ✓ Matter | |
| Insurance | |
| Matter Summary | |
| Vendors | |
| ▶ Document | |

Figure 64: Enter report search criteria

4. Under **Step 2**, check the fields you wish to display in your report.

| DEFINE REPORT SEA | | | | | | |
|--|-----------|--|----|---|-----|--|
| | | | | | | |
| | ARCH | CRITERIA : STEP 2 | 20 | 0F-2 | | |
| | | | | | | |
| | | | | | | |
| hoose Primary Catego | ories t | o Display on Report | | Check All | | |
| | | | | | | |
| Matter | | | | | | |
| | | | | | | |
| Document | | | | | | |
| Document | | | | | | |
| | | | | | | |
| OCUMENT DETAILS | | | | | | |
| OCUMENT DETAILS Acknowledgement Date | • | Acknowledgement Status | | Acknowledgement Use | r 🗌 | Answer Date |
| Acknowledgement Date Assigned By | | Acknowledgement Status Author | | Acknowledgement Use CSC Doc type | r 🗌 | Answer Date CSC Renewal Order No |
| Acknowledgement Date Assigned By Cause # | | Acknowledgement Status Author Check in comments | | Acknowledgement Use CSC Doc type Checked Out? | r 🗌 | Answer Date CSC Renewal Order No Court |
| Acknowledgement Date Acknowledgement Date Assigned By Cause # Csc Transmittal Id | | Acknowledgement Status Author Check in comments Current Version | | Acknowledgement Use CSC Doc type Checked Out? Date Created | r 🗌 | Answer Date CSC Renewal Order No Court Date Served |
| Acknowledgement Date Acknowledgement Date Assigned By Cause # Csc Transmittal Id Days | 8 | Acknowledgement Status Author Check in comments Current Version Document Description | | Acknowledgement Use CSC Doc type Checked Out? Date Created Document Id | r | Answer Date CSC Renewal Order No Court Date Served Document Title |
| OCUMENT DETAILS Acknowledgement Date Assigned By Cause # Csc Transmittal Id Days Document is Service Of Proc | Cess | Acknowledgement Status Author Check in comments Current Version Document Description Document is Time Sensitive | | Acknowledgement Use CSC Doc type Checked Out? Date Created Document Id Entity as Established | | Answer Date CSC Renewal Order No Court Date Served Document Title File/Matter # |
| COCUMENT DETAILS Acknowledgement Date Assigned By Cause # Case Transmittal Id Days Document is Service Of Proc How Served | Cess | Acknowledgement Status Author Check in comments Current Version Document Description Document is Time Sensitive Is Archived? | | Acknowledgement Use CSC Doc type Checked Out? Date Created Document Id Entity as Established Key Words | | Answer Date CSC Renewal Order No Court Date Served Document Title File/Matter # Last checked in/out by |
| OCUMENT DETAILS Acknowledgement Date Assigned By Cause # Cass # Cas Transmittal Id Days Document is Service Of Proc How Served Last checked in/out date | Cess | Acknowledgement Status Author Check in comments Current Version Document Description Document is Time Sensitive Is Archived? Matter Short Name | | Acknowledgement Use CSC Doc type Checked Out? Date Created Document Id Entity as Established Key Words Nature of Case | | Answer Date CSC Renewal Order No Court Date Served Document Title File/Matter # Last checked in/out by Original File Name |
| OCCUMENT DETAILS Acknowledgement Date Assigned By Cause # Cacs at # Cacs ransmittal Id Days Document is Service Of Proc How Served Last checked in/out date Ordinally Served | cess | Acknowledgement Status Author Check in comments Current Version Document Description Document Is Time Sensitive Is Archived? Matter Short Name Pages | | Acknowledgement Use CSC Doc type Checked Out? Date Created Document Id Entity as Established Key Words Nature of Case Privileged | | Answer Date CSC Renewal Order No Court Date Served Document Title File/Matter # Last checked in/out by Original File Name Sequence Number |
| OCCUMENT DETAILS Acknowledgement Date Assigned By Cause # Carsentitle Id Obys Document is Service Of Proc How Served Last checked in/out date Originally Served State Served | € cess | Acknowledgement Status Author Check in comments Current Version Document Description Document Description Document is Time Sensitive Is Archived? Matter Short Name Pages Time Created | | Acknowledgement Use CSC Doc type Checked Out? Date Created Document Id Entity as Established Key Words Nature of Case Privileged Tima Sansitive Davs | | Answer Date CSC Renewal Order No Court Date Served Document Title File/Matter # Last checked in/out by Original File Name Sequence Number Unloaded By |

Figure 65: Select Report Fields

5. Under **SET COLUMN ORDER AND SORT ORDER**, put the fields in the column order that you would like displayed. You can also set the **Sort Order** by highlighting an item and moving it to the **Sort Order** column.

| | All Columns: Display Order | Sorted Columns: Sort Order | |
|--------|----------------------------|----------------------------|----------|
| | Document Title | | TOP |
| TOP | Acknowledgement Status | | |
| LIP | Acknowledgement Date | | UP |
| 0. | Jurisdiction | | DOWN |
| DOWN | | | |
| | | | BOTTOM |
| BOTTOM | | | ASCIDESC |

Figure 66: Set column order and sort order

6. If you'd like to save your report click **SAVE**. You can overwrite an existing report by selecting a report in the **Select Existing Report Name** dropdown or you can create a new report by leaving the field at **Select a Report**, then typing the name of the report in **Enter New Report Name**.

Tip: You can save your report criteria so you can run the same report at a later time. You have the option to save your report either prior to running it or after. 7. Name the report.

| Select Existing Report Name | Document Report | • | |
|-----------------------------|-----------------------------|----|--|
| | OR | 5% | |
| Enter New Report Name | | | |
| Public/Private: | Make Public Make Priva | te | |

Figure 67: Save and name the report

- 8. Click **RUN REPORT** or **RUN & SAVE** to continue.
- 9. Your report results will be generated based on your criteria and display preferences.

| D | DOCUMENT TITLE | DOCUMENT IS SERVICE OF PROCESS | ACKNOWLEDGEMENT STATUS | ACKNOWLEDGEMENT DATE | HOW SERVED | JURISDICTION | DETAIL |
|----|--|-----------------------------------|---------------------------|-------------------------|---------------|-------------------------|--------|
| Ar | nswer | Yes | No | | Regular Mail | Delaware | View |
| E | xhibits | Yes | Yes | 02/10/2020 | Regular Mail | Louisiana | View |
| G | arnishment Disposition | Yes | No | | Regular Mail | Arizona | View |
| Af | ffidavit/Declaration | Yes | Yes | 02/10/2020 | Regular Mail | Colorado | View |
| Ba | ankruptcy Pleading | Yes | No | | Regular Mail | District of Columbia | View |
| Ar | mended Counterclaim | Yes | No | | Regular Mail | Delaware | View |
| O | THER: Testing the Doc Type Other Before the lease | Yes | No | | Regular Mail | Illinois | View |

Figure 68: Report results

10. To save a report so you can run it later, click the icon next to Save Report. You can overwrite an existing report by selecting a report in the Select Existing Report Name dropdown, or create a new report by leaving the field at Select a Report.

| SAVE REPORT | |
|------------------------------|--------------------------|
| Select Existing Report Name: | Document Report |
| | OR |
| Enter New Report Name: | |
| Public/Private: | Make Public Make Private |

Figure 69: Save report after running

8.3. Printing a report

To print a report, click the **Reports Actions** menu and select **Print Report.**



Figure 70: Print report

The report will be displayed in a printer-friendly format.

| Report | Output Printer Friendly Page - Google Chrome | | | | - 🗆 | |
|-----------|---|--------------------------------|-------------------------|------------------------|-------------------------|---|
| sop.c | cscglobal.com/pbng/reports/printReportO | utput.pb?reportTypeId=3 | | | | |
| Print | Close | | | | | |
| | ant Data | | | | | |
| Rep | bort Data | | | | | |
| | | | | | | |
| Printed E | By: Apple Pie Date Printed: 03/10/2020 12:28 PM | EDT | | | | |
| | | | | | 107 0 101 0 | |
| # Docu | ument Title | Document is Service Of Process | Nature of Case | Acknowledgement Status | Jurisdiction | _ |
| 1 Answ | ver | Yes | Bankruptcy | No | Delaware | _ |
| 2 Exhit | bits | Yes | Environmental | Yes | Louisiana | _ |
| 3 Gam | ishment Disposition | Yes | Garnishment/Withholding | No | Arizona | _ |
| 4 Affida | avit/Declaration | Yes | Labor / Employment | Yes | Colorado | _ |
| 5 Bank | cruptcy Pleading | Yes | Bankruptcy | No | District of Columbia | |
| 6 Amer | nded Counterclaim | Yes | Garnishment/Withholding | No | Delaware | |
| 7 OTH | ER: Testing the Doc Type Other Before the release | Yes | Contract | No | Illinois | |
| 8 OTH | ER: Testing MM Doc Type Other before the release | Yes | Contract | No | Delaware | |
| 9 OTH | ER: Test in re as title of action | Yes | Others | No | Delaware | _ |
| 10 Gam | ishment Disposition | Yes | Gamishment/Withholding | No | Delaware | _ |
| 11 Bank | ruptcy Pleading | Yes | Bankruptcy | No | Delaware | |
| 12 Exhib | bits | Yes | Environmental | Yes | Delaware | - |
| 13 OTH | ER: All Other Service desc and doc type other in re | Yes | Others | No | Delaware | - |
| 14 Defa | ult Motion/Judgment/Order | Yes | Environmental | No | Delaware | - |
| 15 Bank | cruptcy Pleading | Yes | Bankruptcy | No | Delaware | |
| 16 OTH | ER: Test for serv desc other and doc type other | Yes | Others | No | Delaware | |
| 17 OTH | ER: Test doc type other | Yes | Others | Yes | Delaware | |
| | | | | | | |

Figure 71: Printer-friendly report data

8.4. Modifying and running saved reports

Saved reports can be accessed from the **Reports Grid**.

- To modify saved reports, click the Load Report icon 🗟 next to the report you want to modify.
- To run saved reports, click the **Run Report** icon <u> </u>next to the report you want to run.

8.5. Exporting a report

To export a report to Microsoft Excel®, click the Reports Actions menu and select Export Report to Excel.



Figure 72: Export report to Excel

You can either select **Open** to view your report in Microsoft Excel, or **Save** your report to a network or hard drive.



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