CSC

User Guide

CSC Matter Management℠

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Contact Information

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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:

- Calendar
- Refresh
- View a document
- View document with CSC Transmittal (CSC Uploaded)
- View accompanying transmittal page (CSC Uploaded)
- View/Edit note information
- View/Edit document information
- SpeedShare menu
- Go to Org Folder for this Matter
- View/Edit Matter
- Load Report
- Run Report
- View/Edit Unread Note
- Identifies a matter or document that currently contains a note, which you may edit or add to
- Add a note to a document that doesn't yet contain a note

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.

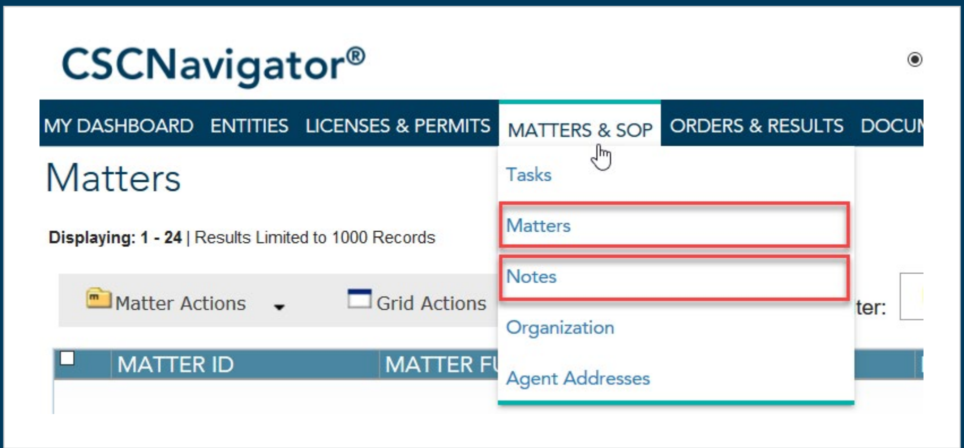


Figure 1: Matters & SOP dropdown list

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 cscglobal.com 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.**

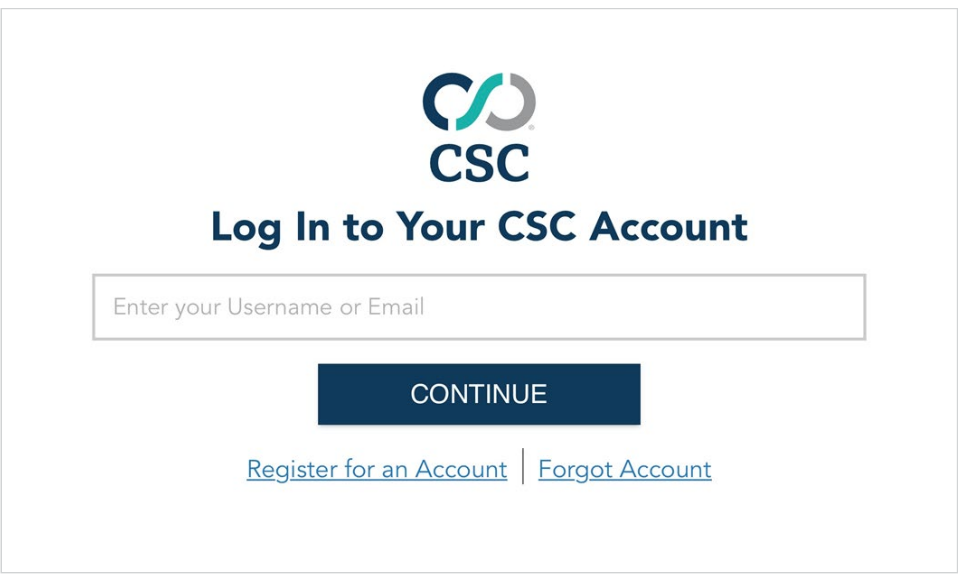


Figure 2: Logging in

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.

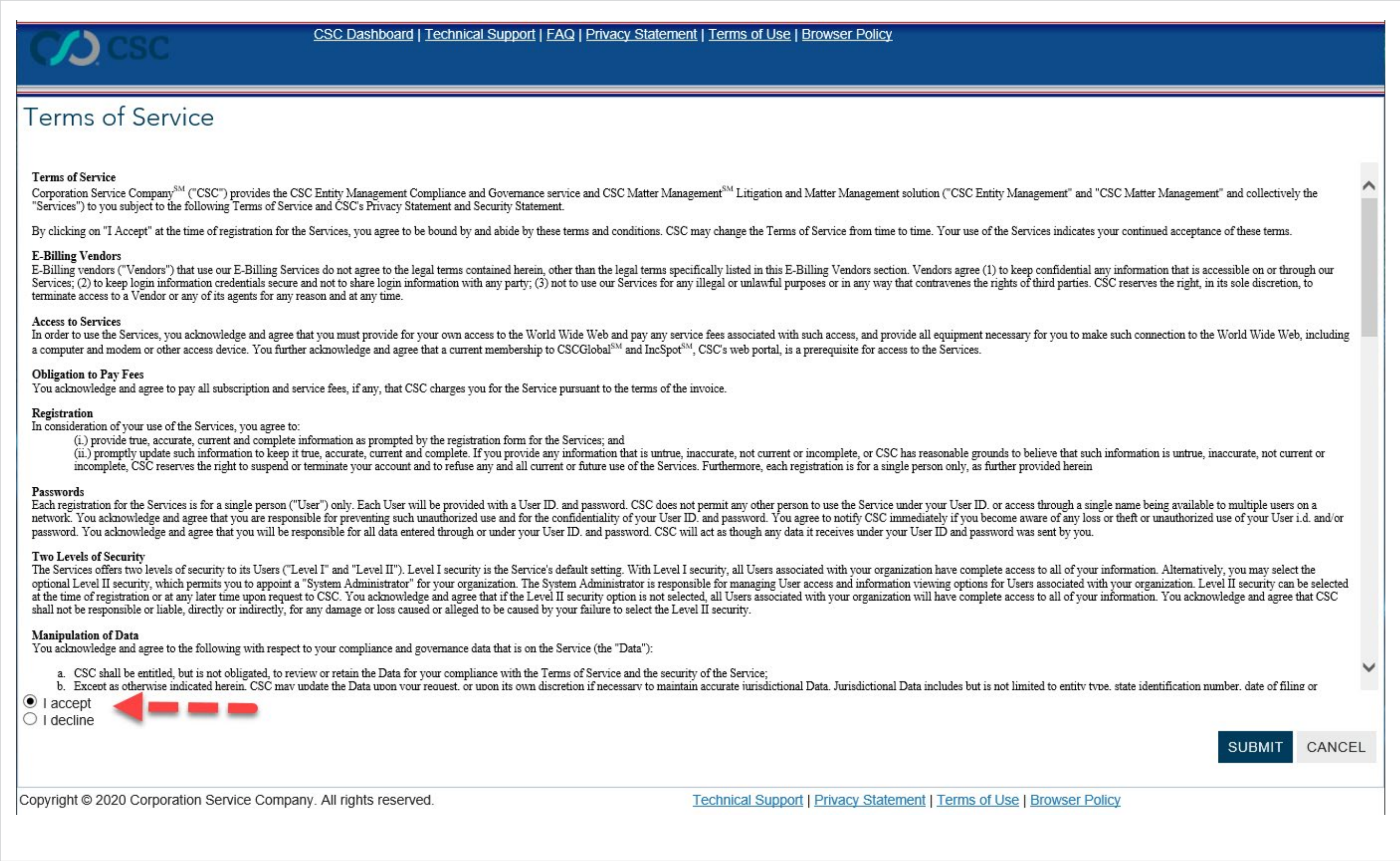


Figure 3: Terms of Service (displayed at initial log in)

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.

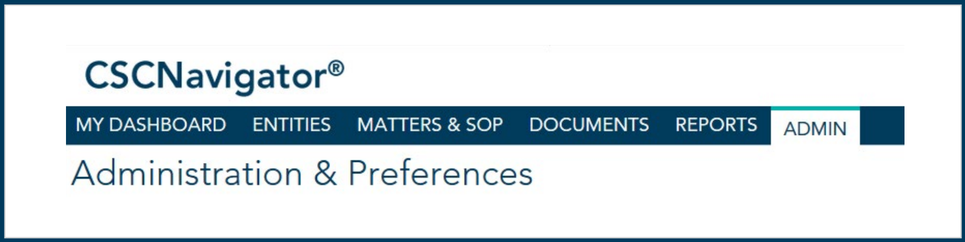


Figure 4: Admin button (accessible from main menu)

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.**

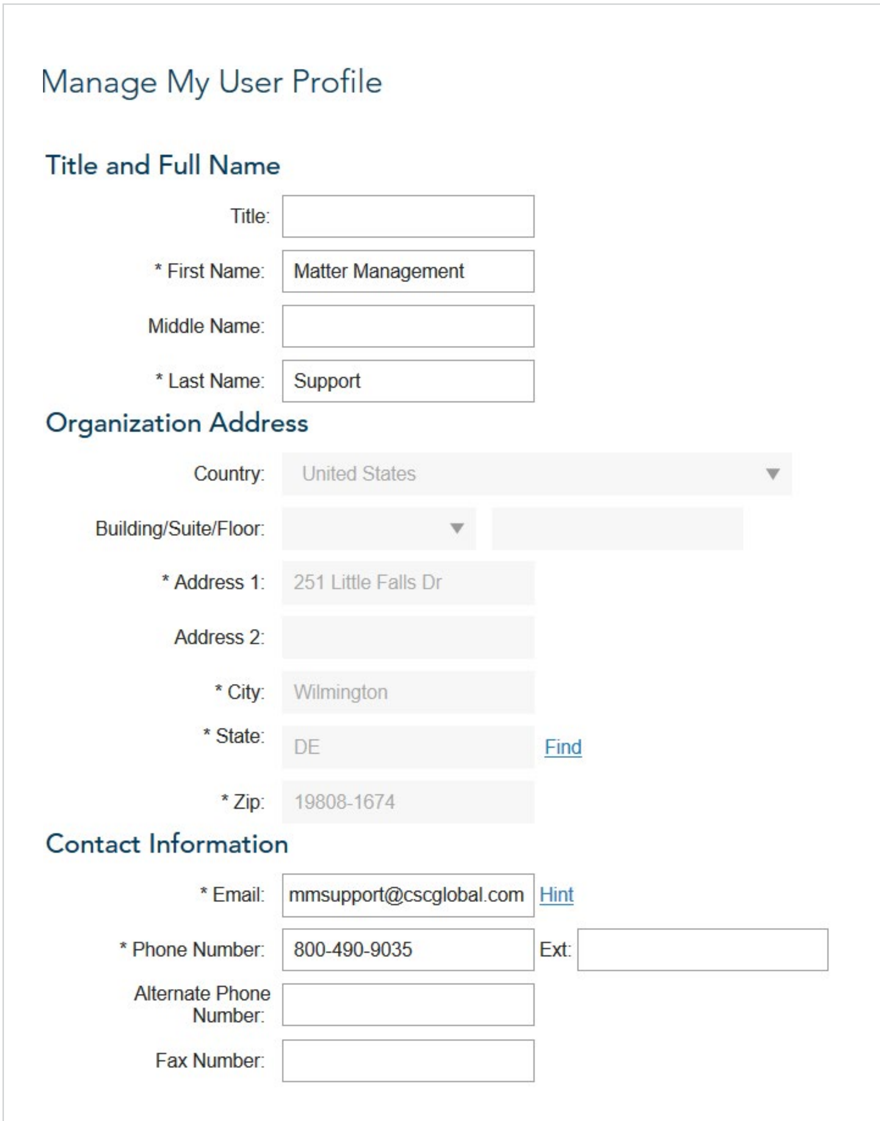


Figure 5: Manage My User Profile

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.**

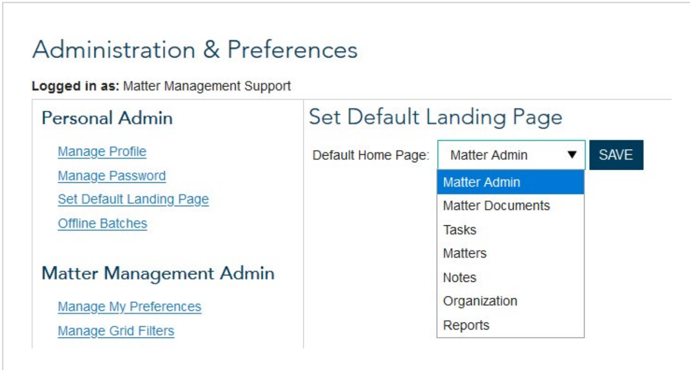


Figure 6: Change default landing page

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.

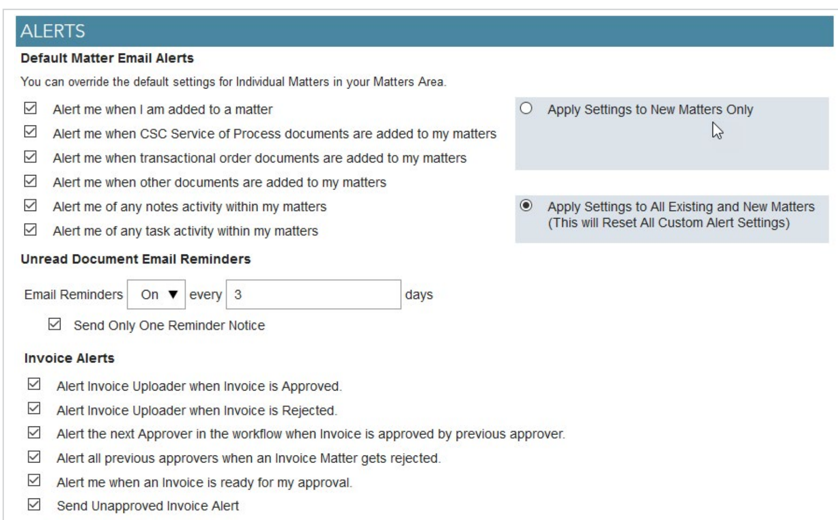


Figure 7: Alerts

Tip: *Email alerts come from the address cscmattermanagement@cscinfo.com*

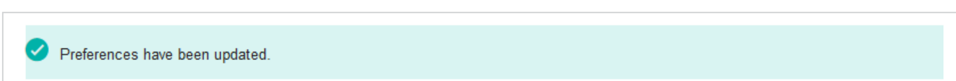


Figure 8: Confirmation message

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.

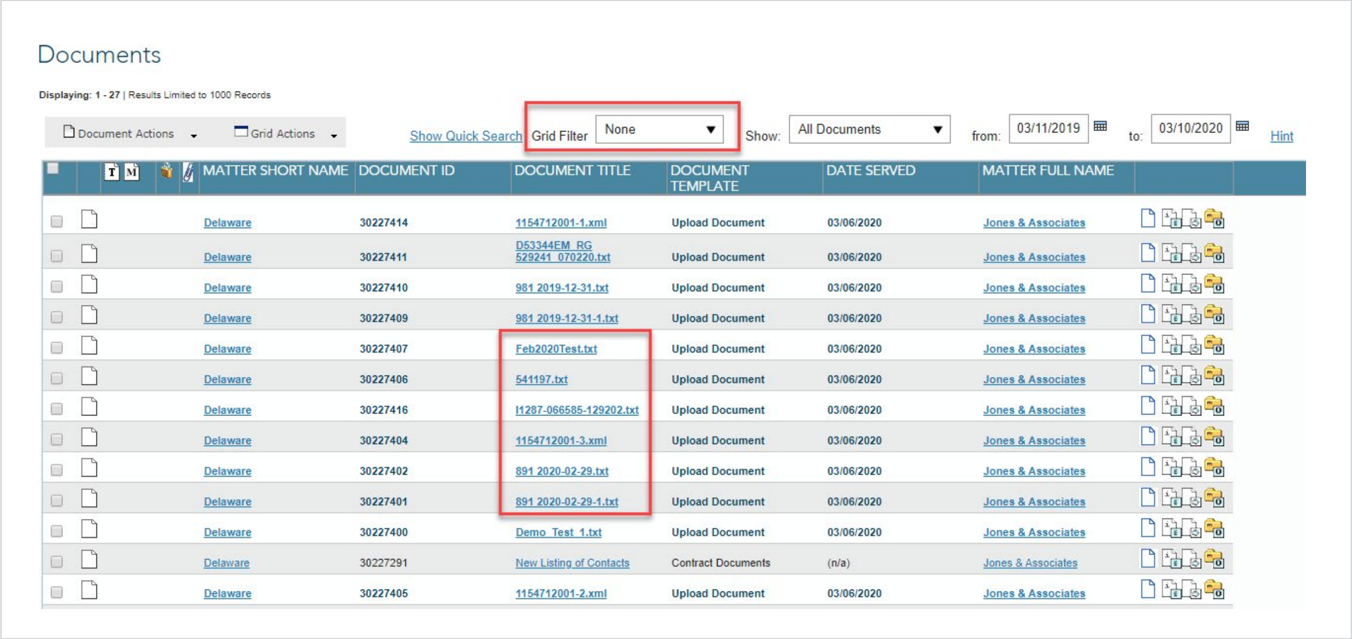


Figure 9: Documents list

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:

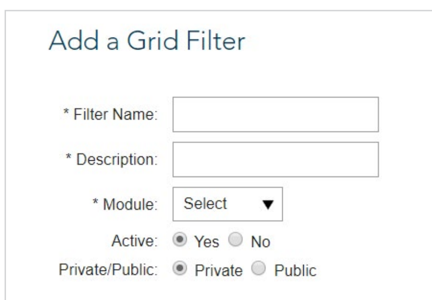


Figure 12: Add a grid filter

- **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).

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.

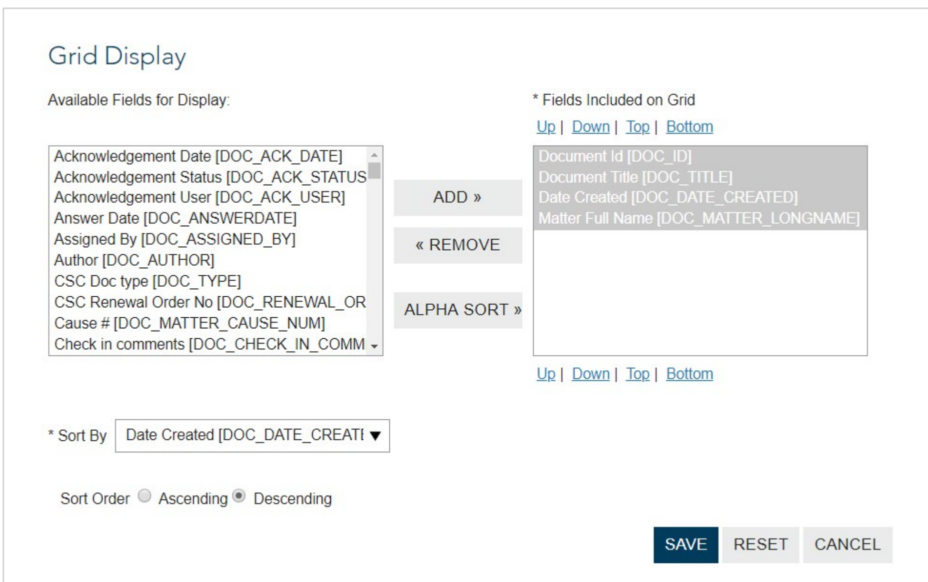


Figure 14: Grid Display

- **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.

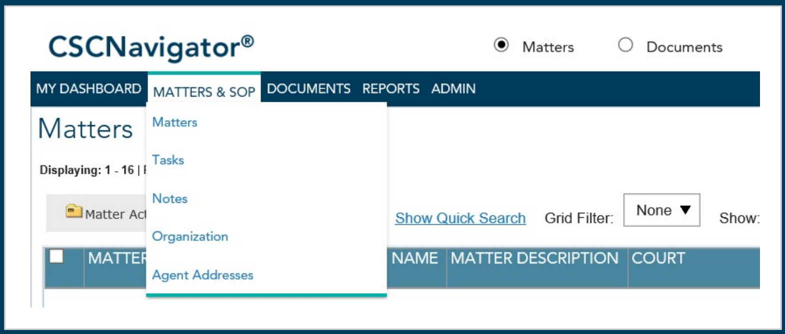


Figure 15: To view a specific activity grid, select the corresponding main menu option

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

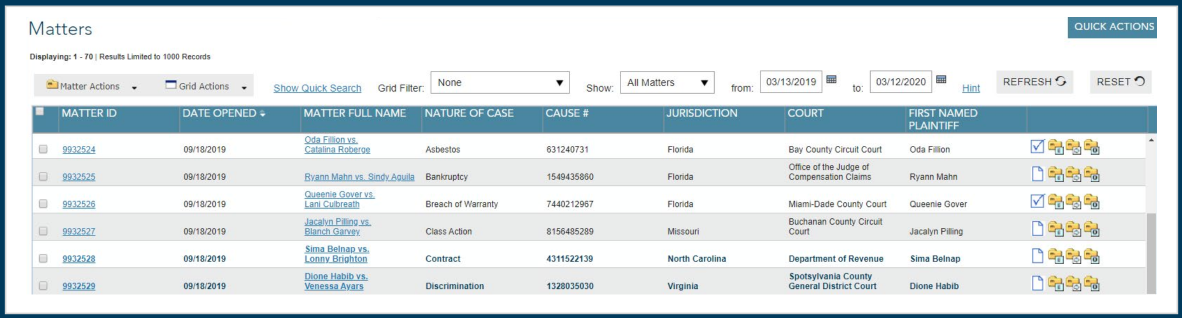


Figure 16: Activity grid

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 ▦ .

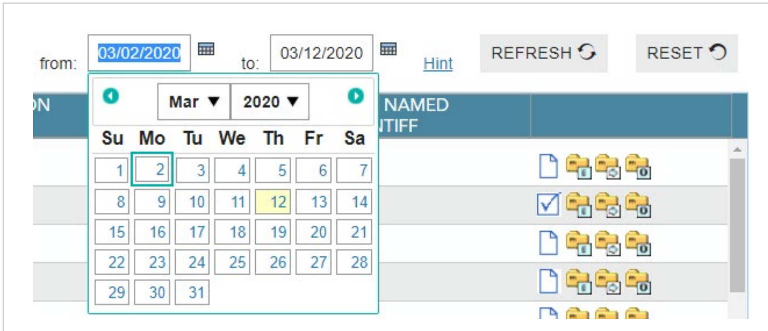


Figure 17: Adjusting date range

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.**

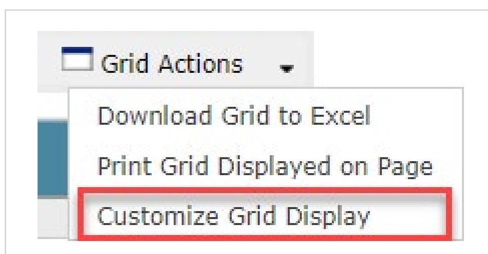


Figure 18: Grid actions

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.

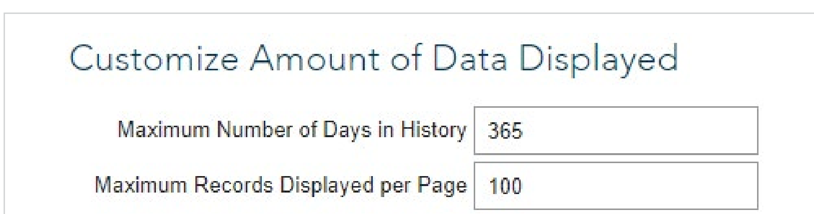


Figure 19: Customize amount of data displayed

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.**

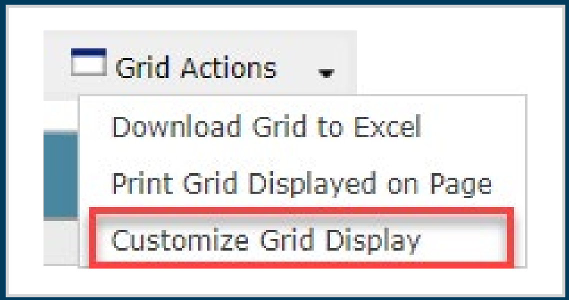


Figure 20: Grid actions

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.

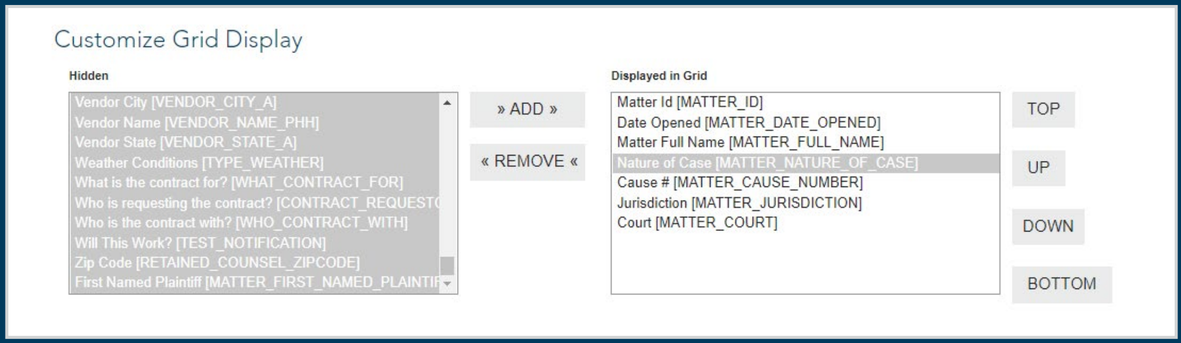


Figure 21: Customize grid display

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.

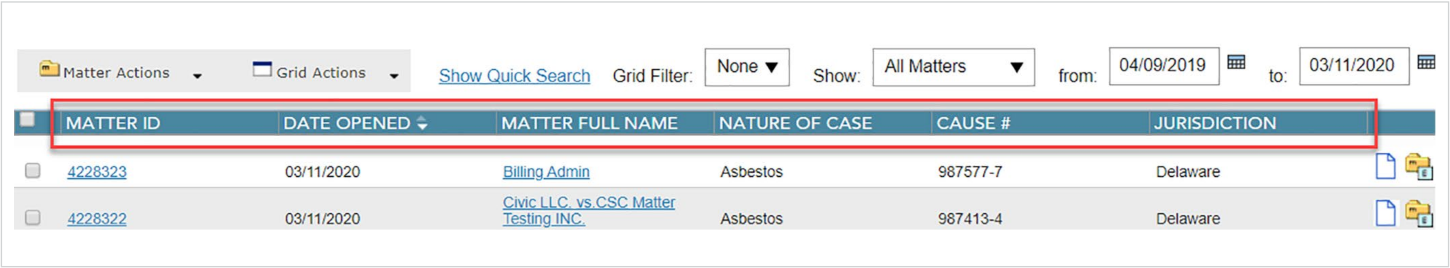


Figure 22: Sorting the activity grids

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** 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.

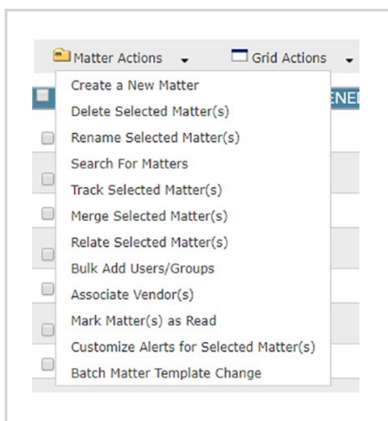
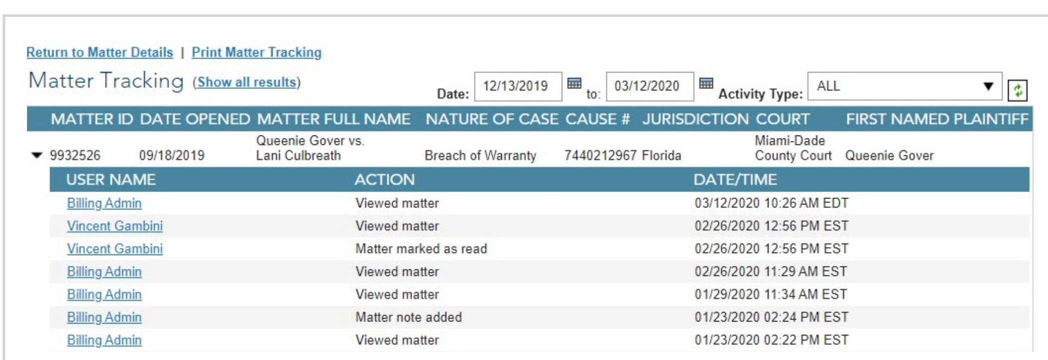


Figure 24: Track selected [Documents/Matters/Notes]

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



Return to Matter Details | Print Matter Tracking

Matter Tracking (Show all results) Date: 12/13/2019 to: 03/12/2020 Activity Type: ALL

MATTER ID	DATE OPENED	MATTER FULL NAME	NATURE OF CASE	CAUSE #	JURISDICTION	COURT	FIRST NAMED PLAINTIFF
9932526	09/18/2019	Queenie Gover vs. Lani Culbreath	Breach of Warranty	7440212967	Florida	Miami-Dade County Court	Queenie Gover

USER NAME	ACTION	DATE/TIME
Billing Admin	Viewed matter	03/12/2020 10:26 AM EDT
Vincent Gambini	Viewed matter	02/26/2020 12:56 PM EST
Vincent Gambini	Matter marked as read	02/26/2020 12:56 PM EST
Billing Admin	Viewed matter	02/26/2020 11:29 AM EST
Billing Admin	Viewed matter	01/29/2020 11:34 AM EST
Billing Admin	Matter note added	01/23/2020 02:24 PM EST
Billing Admin	Viewed matter	01/23/2020 02:22 PM EST

Figure 25: Tracking

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.

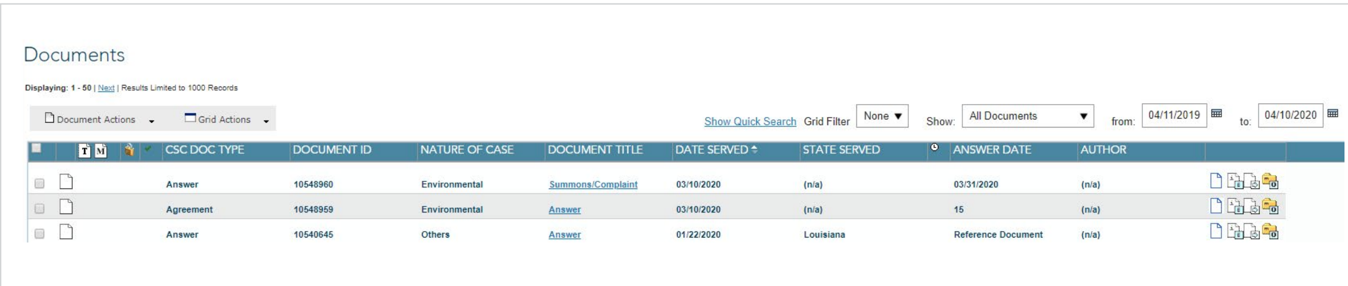


Figure 26: Documents grid

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

View an accompanying transmittal page (CSC uploaded)

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.

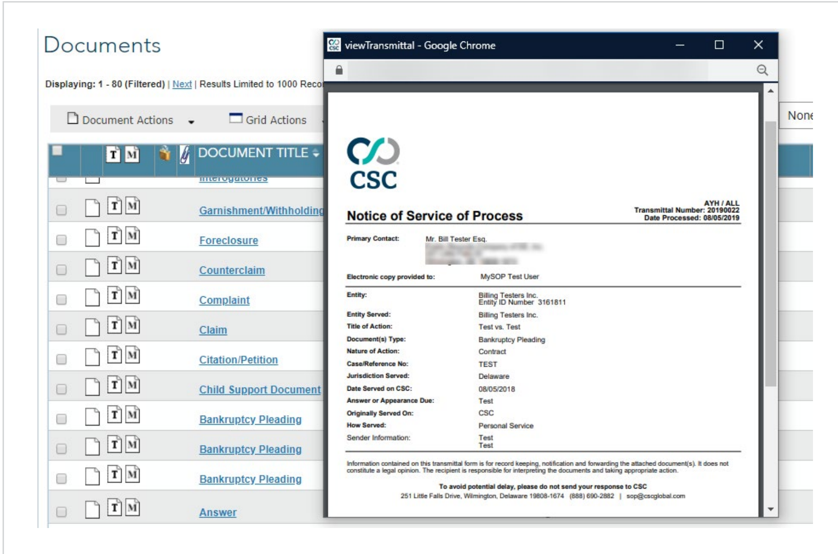


Figure 27: View document

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 T icon and then the **customer name** link.

5.1.4. View and edit document information

Upon clicking the **view and edit document information** icon , to the right of the grid, the **Document Information** window will appear for you to review or edit.

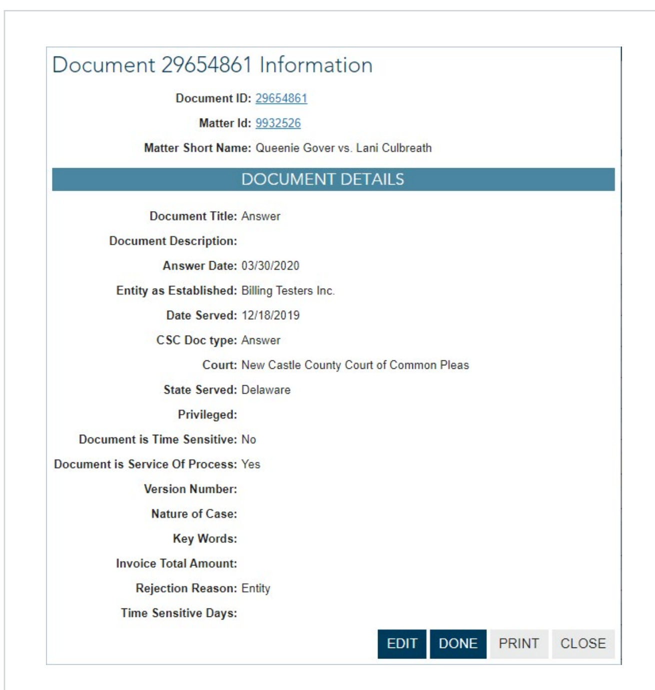


Figure 28: Document information

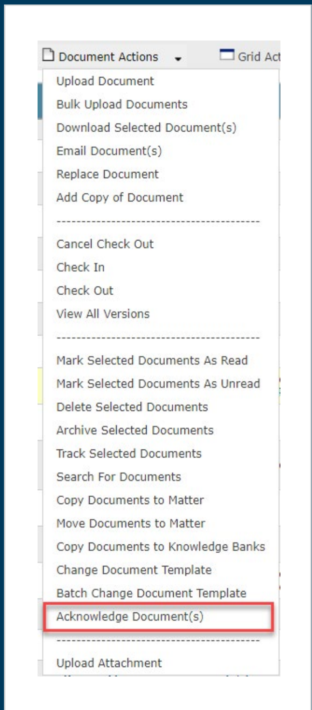


Figure 29: Document actions, acknowledge document(s)

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.

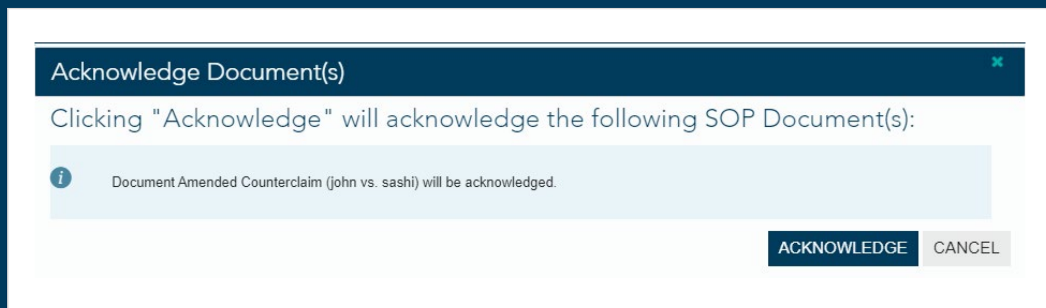


Figure 30: Acknowledge document(s) pop up

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:

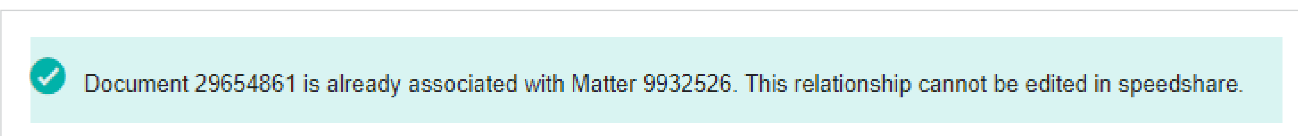


Figure 31: Document and matter relationship

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

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

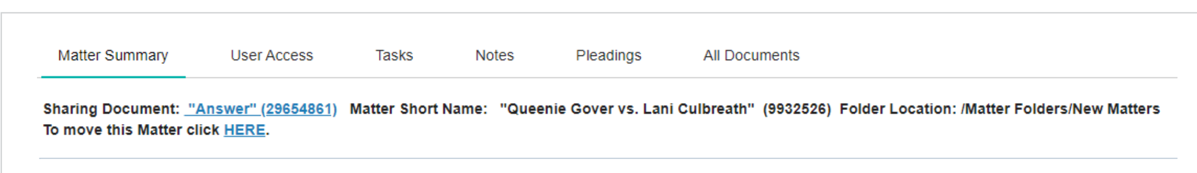


Figure 32: SpeedShare tabs

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.

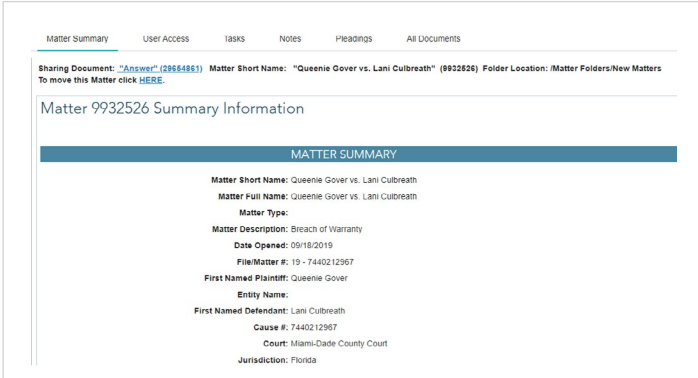


Figure 33: Matter summary

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.

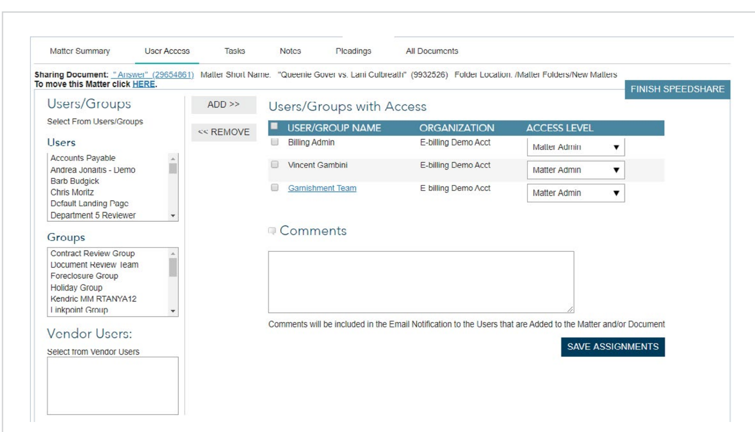


Figure 34: User access

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).

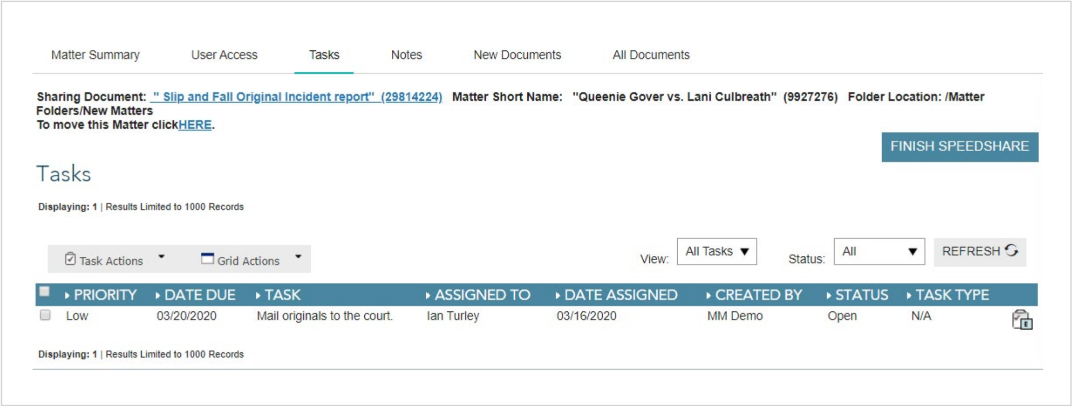


Figure 35: Tasks

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.

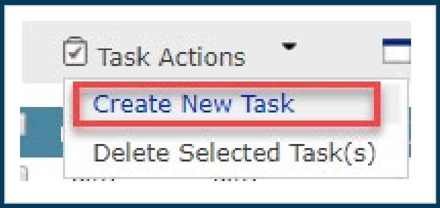


Figure 36: Create new task

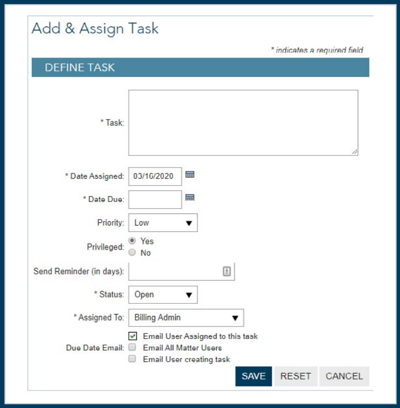


Figure 37: New task

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.

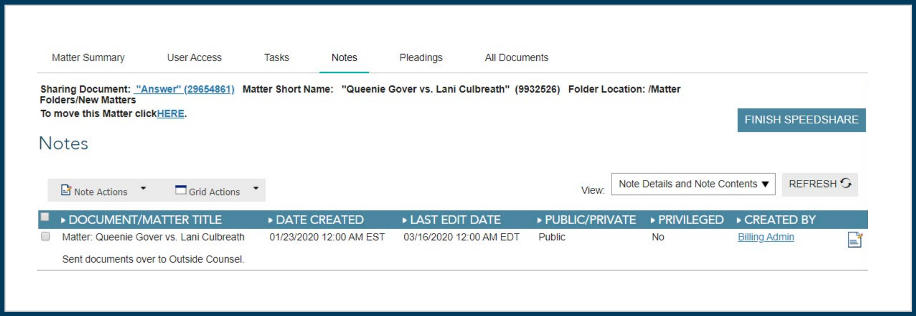


Figure 38: Notes

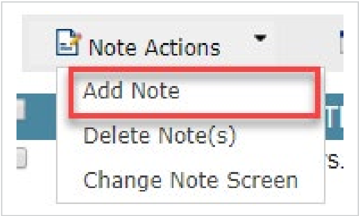


Figure 39: Add note

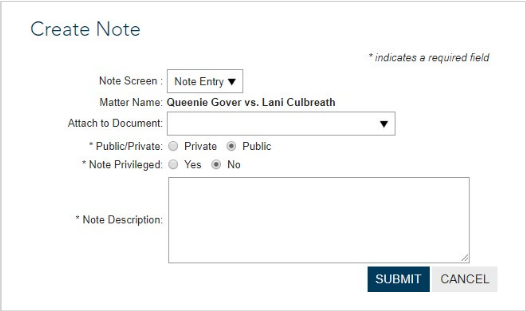


Figure 40: Create Note

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.

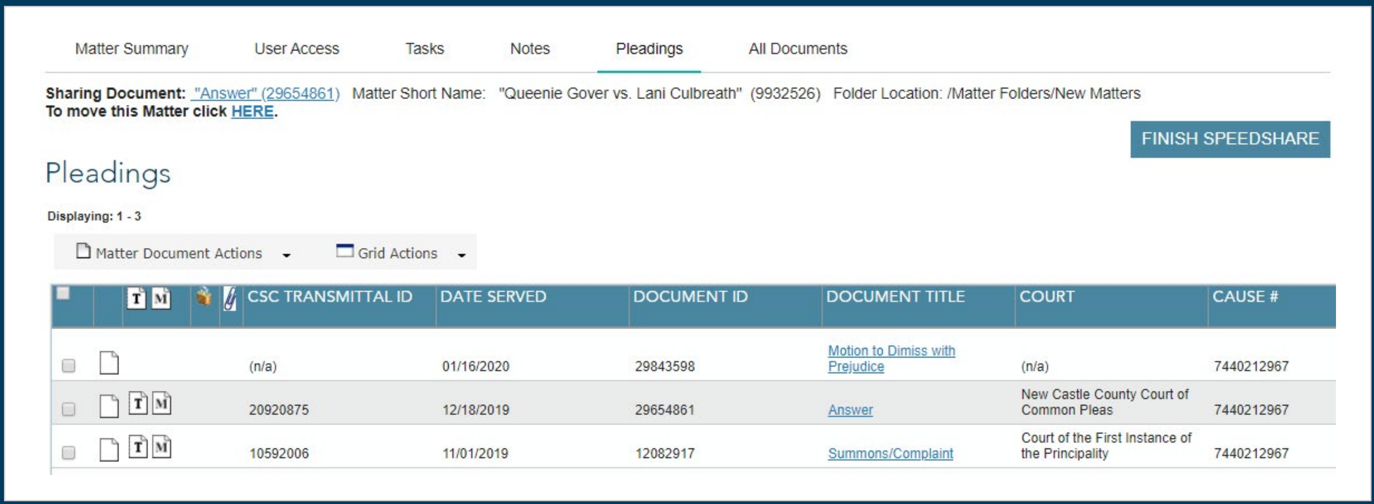


Figure 41: Pleadings

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:

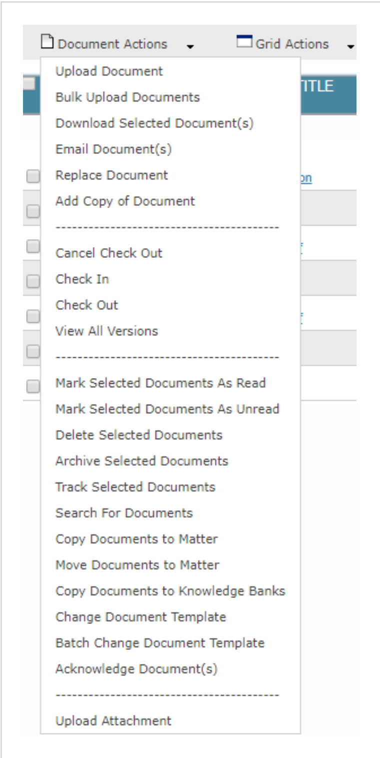


Figure 42: Document actions

- **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.

Figure 43: Upload to matter field

> **Tip:** *You can enter three or more characters in the matter name to return possible matches.*

3. Double-click on the document name.

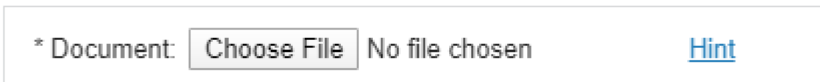


Figure 44: Upload to matter field, browse for file

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

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.

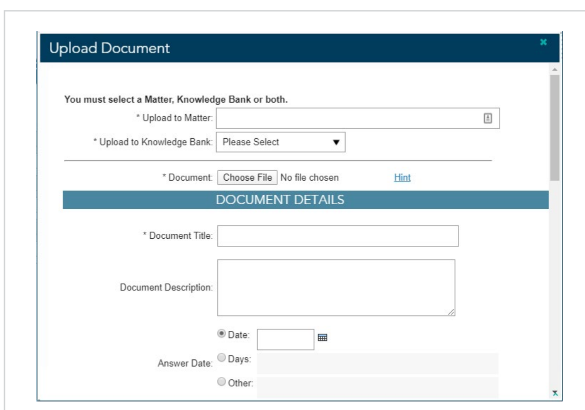


Figure 46: Upload document window

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 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.

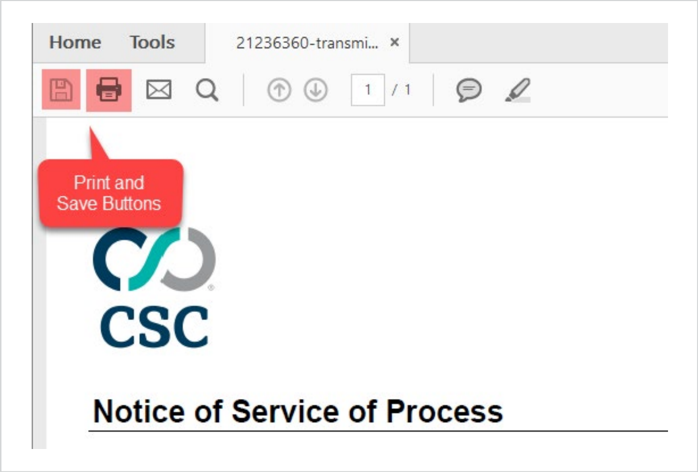


Figure 47: Adobe print and save buttons

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.

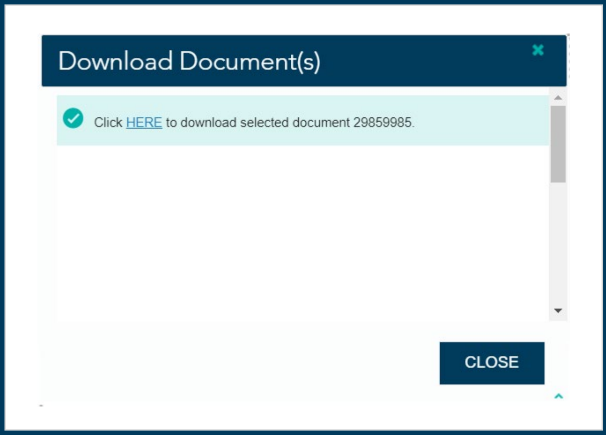


Figure 48: HERE link

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.

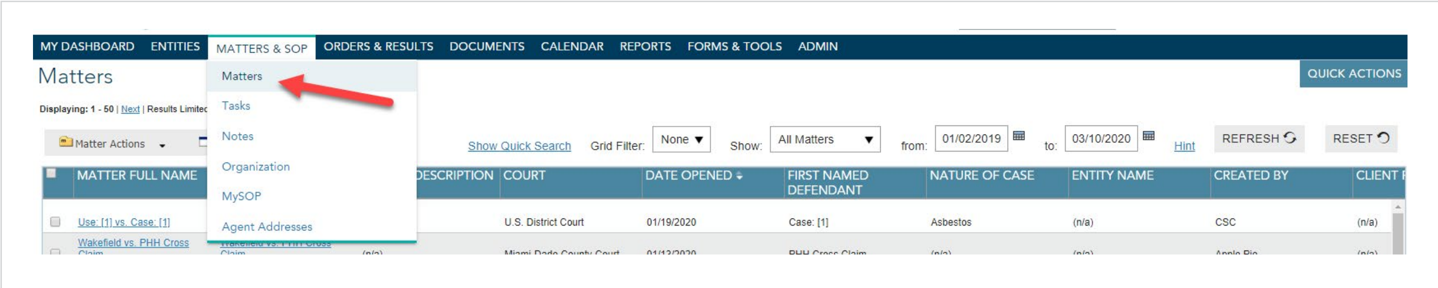


Figure 49: Matters activity grid

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.

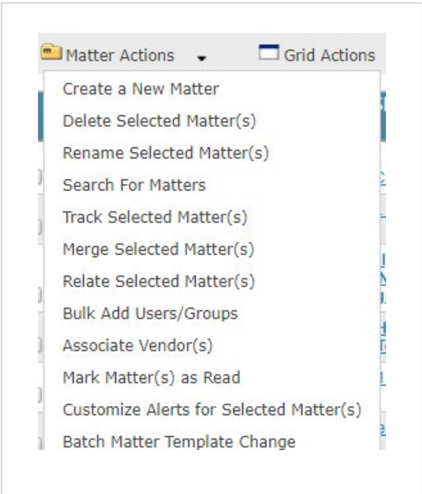


Figure 50: Matter actions menu

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  from the matters grid. When the matter opens, a navigation pane appears on the left, with the matter summary on the right.

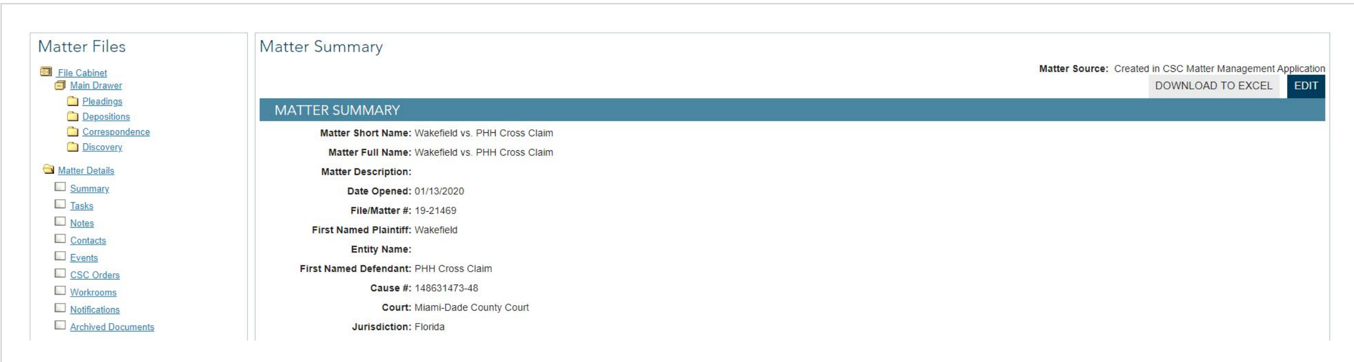


Figure 51: Matter summary

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:

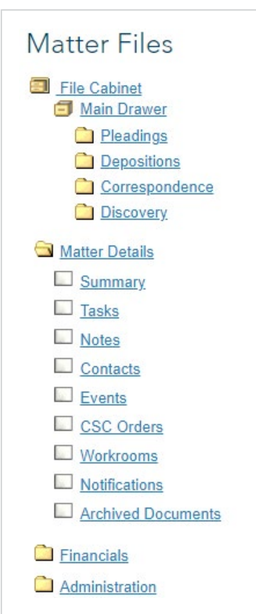


Figure 52: Matter summary

- **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.

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.

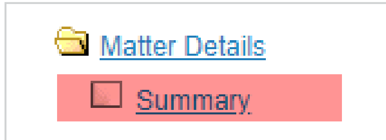


Figure 55: Matter summary

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.

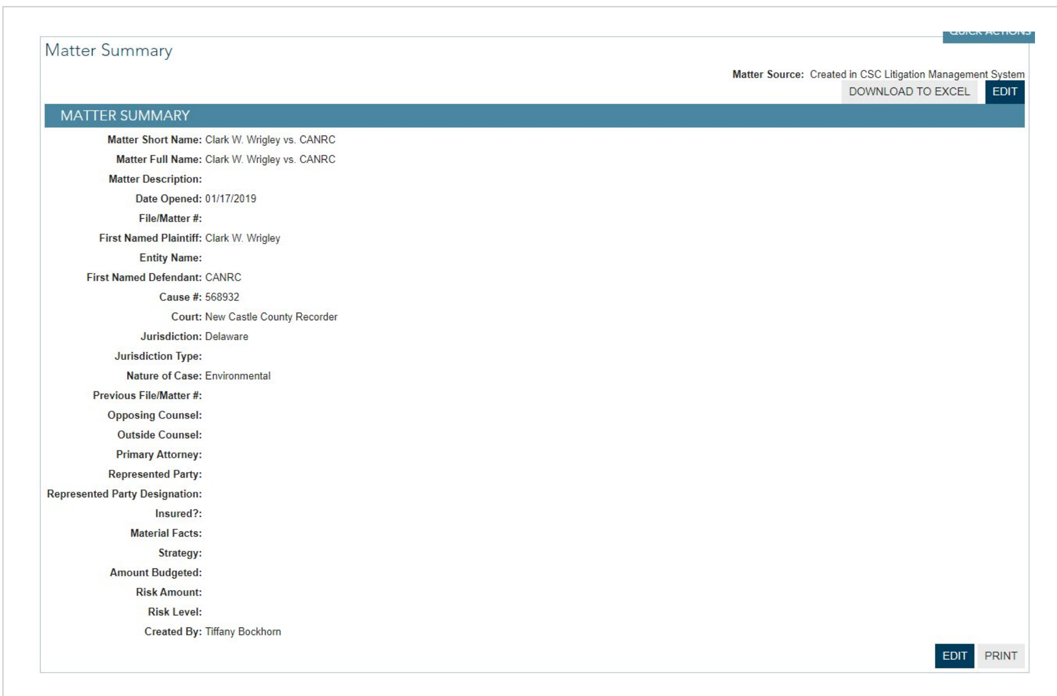


Figure 56: Editable MATTER SUMMARY fields

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 , as well as from the **Matter Details** list. The quickest way to add a note is to click the A**dd/View Matter Notes** icon 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).

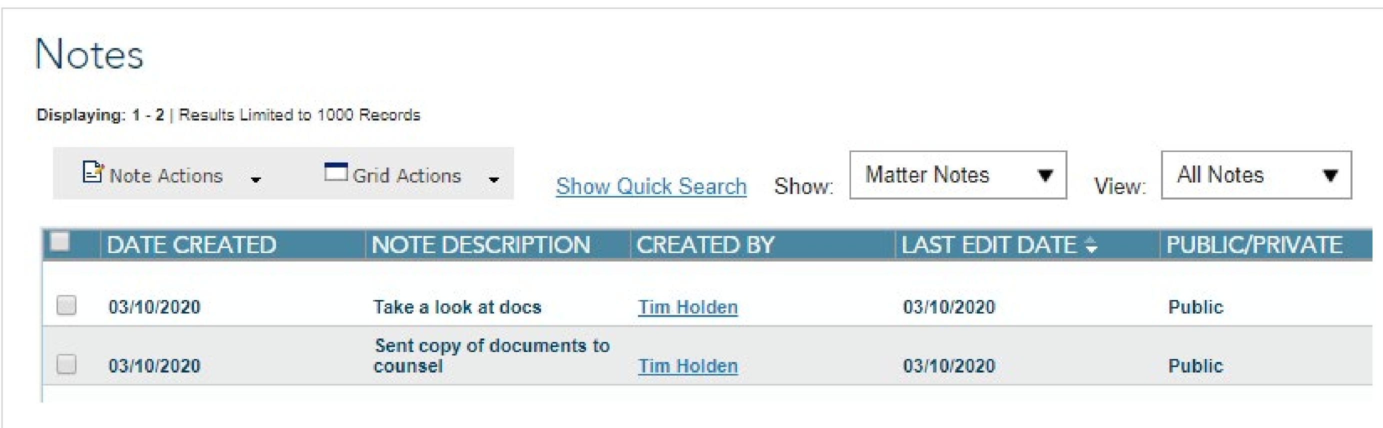


Figure 57: Notes grid

Important links within the grid include:

View or edit note information

SpeedShare menu

View or edit unread note information

Matter

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.

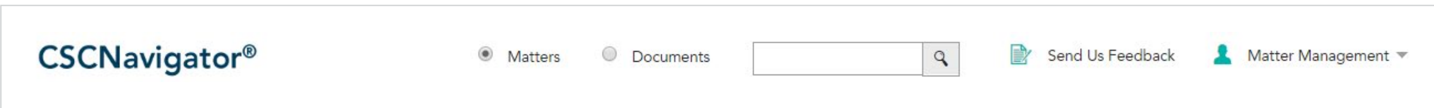


Figure 58: Quick Search

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.**

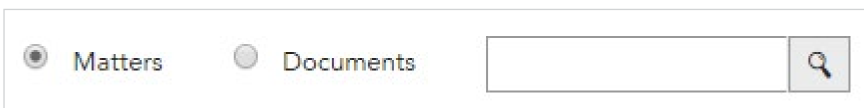


Figure 59: Quick search box

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

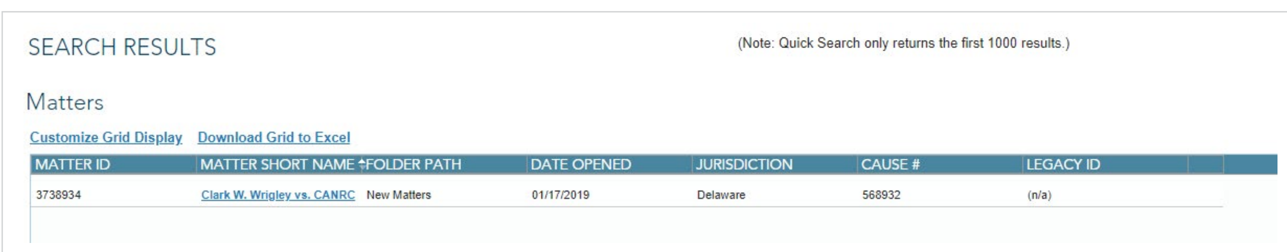


Figure 60: Quick search results

> **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:

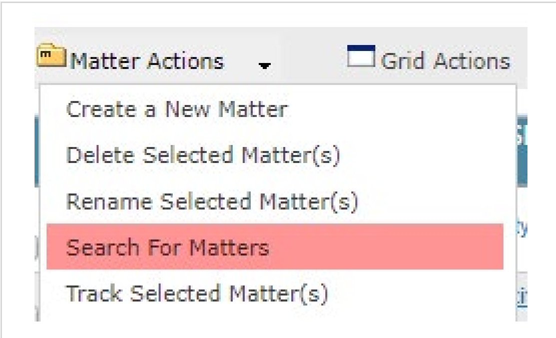


Figure 61: Search for matters

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.

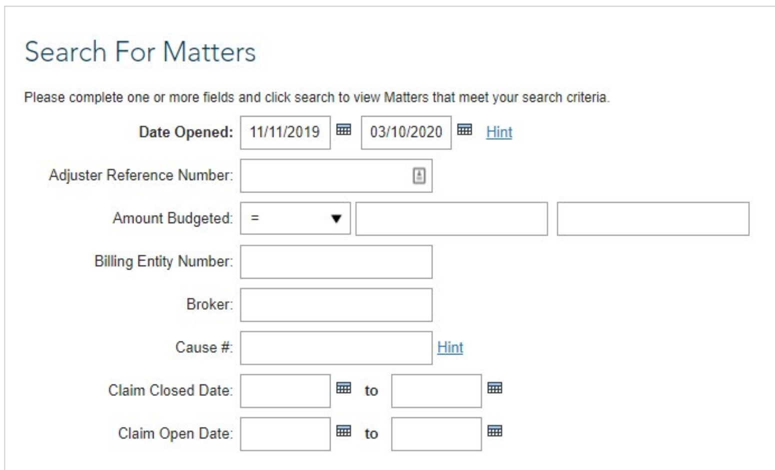


Figure 62: Matters search criteria

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.

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.**

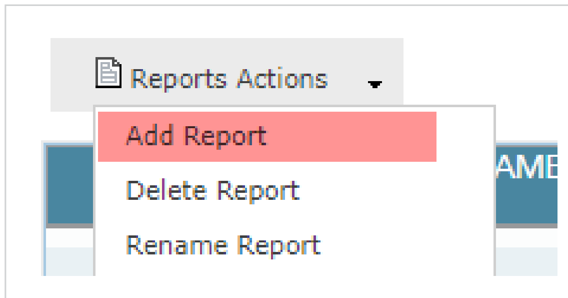


Figure 63: Add report

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.*

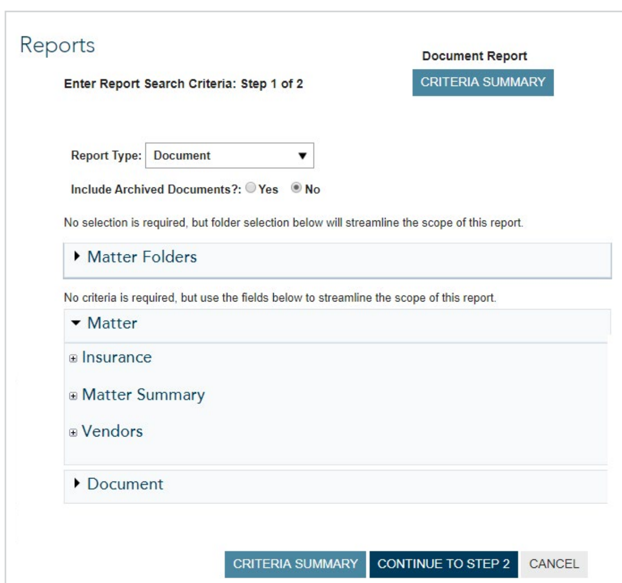


Figure 64: Enter report search criteria

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

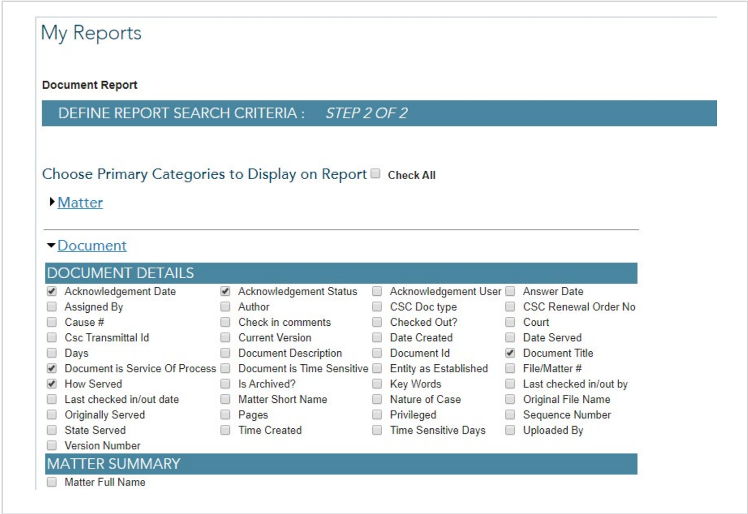


Figure 65: Select Report Fields

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.

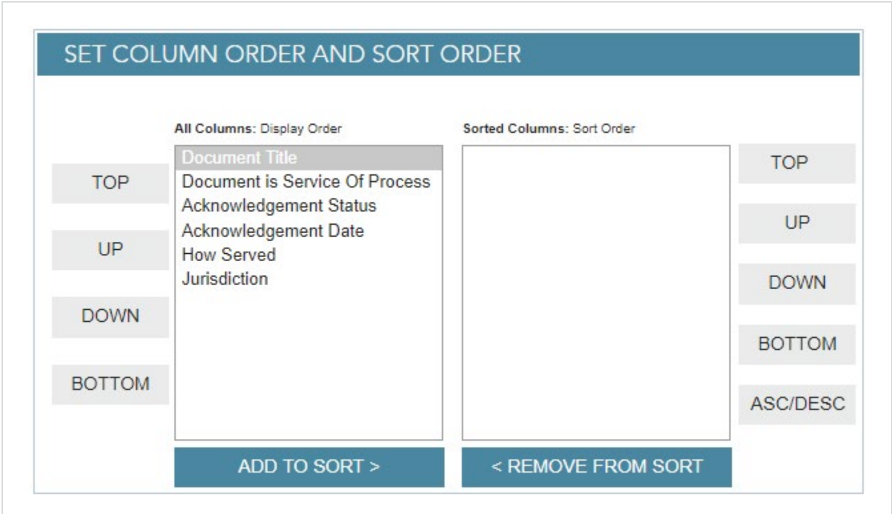


Figure 66: Set column order and sort order

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.

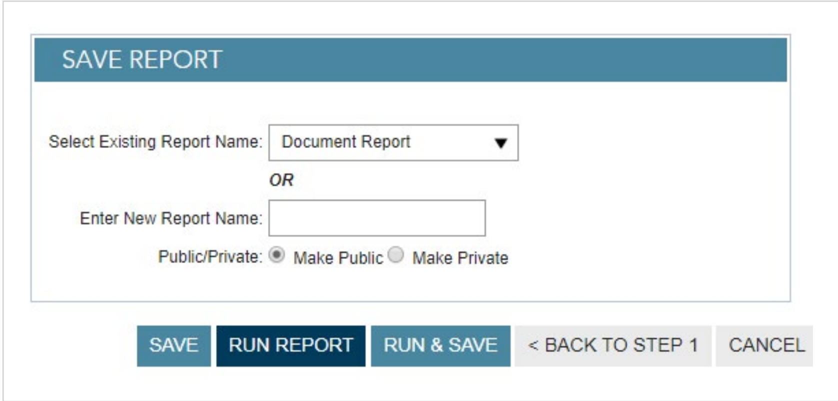
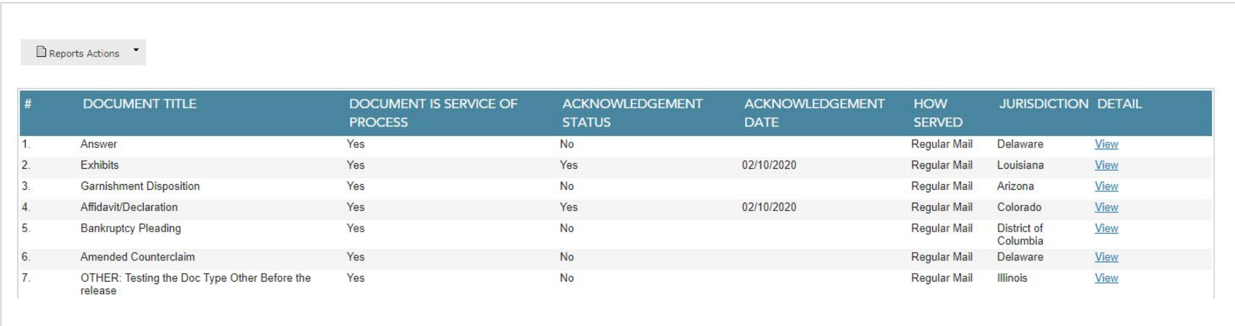


Figure 67: Save and name the report

8. Click **RUN REPORT** or **RUN & SAVE** to continue.

9. Your report results will be generated based on your criteria and display preferences.


Reports Actions

#	DOCUMENT TITLE	DOCUMENT IS SERVICE OF PROCESS	ACKNOWLEDGEMENT STATUS	ACKNOWLEDGEMENT DATE	HOW SERVED	JURISDICTION	DETAIL
1.	Answer	Yes	No		Regular Mail	Delaware	View
2.	Exhibits	Yes	Yes	02/10/2020	Regular Mail	Louisiana	View
3.	Garnishment Disposition	Yes	No		Regular Mail	Arizona	View
4.	Affidavit/Declaration	Yes	Yes	02/10/2020	Regular Mail	Colorado	View
5.	Bankruptcy Pleading	Yes	No		Regular Mail	District of Columbia	View
6.	Amended Counterclaim	Yes	No		Regular Mail	Delaware	View
7.	OTHER: Testing the Doc Type Other Before the release	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.**

Figure 69: Save report after running

8.3. Printing a report

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

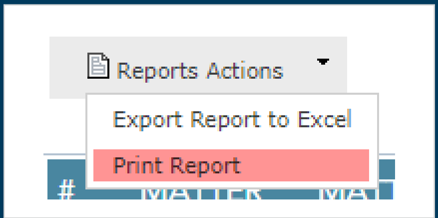
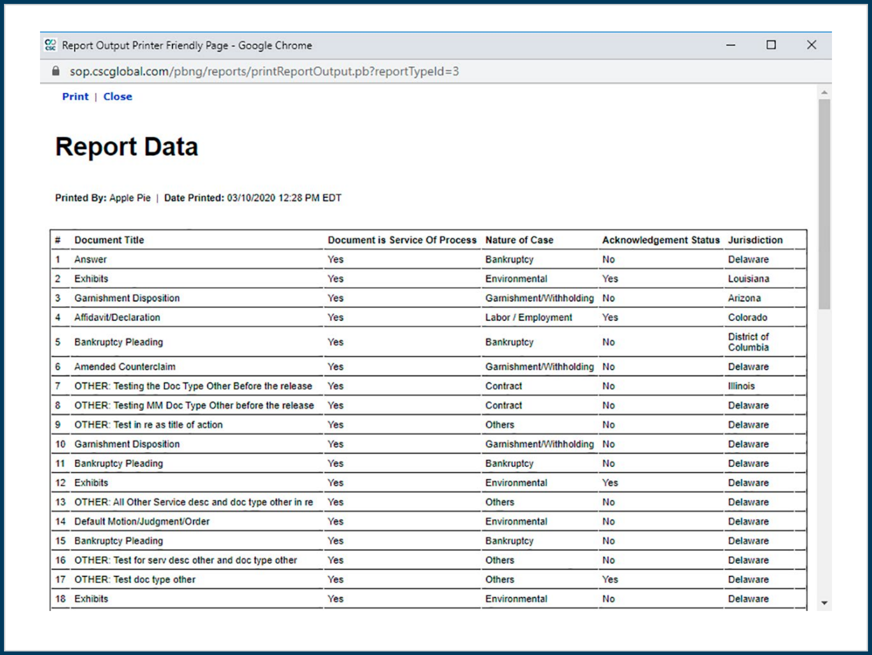


Figure 70: Print report

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



Report Output Printer Friendly Page - Google Chrome

sop.cscglobal.com/pbng/reports/printReportOutput.pb?reportTypeId=3

Print | Close

Report Data

Printed By: Apple Pie | **Date Printed:** 03/10/2020 12:28 PM EDT

#	Document Title	Document is Service Of Process	Nature of Case	Acknowledgement Status	Jurisdiction
1	Answer	Yes	Bankruptcy	No	Delaware
2	Exhibits	Yes	Environmental	Yes	Louisiana
3	Garnishment Disposition	Yes	Garnishment/Withholding	No	Arizona
4	Affidavit/Declaration	Yes	Labor / Employment	Yes	Colorado
5	Bankruptcy Pleading	Yes	Bankruptcy	No	District of Columbia
6	Amended Counterclaim	Yes	Garnishment/Withholding	No	Delaware
7	OTHER: Testing the Doc Type Other Before the release	Yes	Contract	No	Illinois
8	OTHER: Testing MM Doc Type Other before the release	Yes	Contract	No	Delaware
9	OTHER: Test in re as title of action	Yes	Others	No	Delaware
10	Garnishment Disposition	Yes	Garnishment/Withholding	No	Delaware
11	Bankruptcy Pleading	Yes	Bankruptcy	No	Delaware
12	Exhibits	Yes	Environmental	Yes	Delaware
13	OTHER: All Other Service desc and doc type other in re	Yes	Others	No	Delaware
14	Default Motion/Judgment/Order	Yes	Environmental	No	Delaware
15	Bankruptcy Pleading	Yes	Bankruptcy	No	Delaware
16	OTHER: Test for serv desc other and doc type other	Yes	Others	No	Delaware
17	OTHER: Test doc type other	Yes	Others	Yes	Delaware
18	Exhibits	Yes	Environmental	No	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 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.**

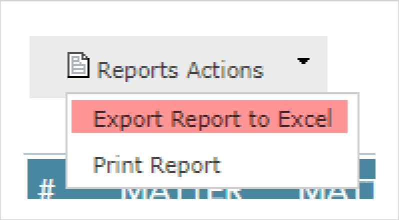


Figure 72: Export report to Excel

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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