opentext™

OpenText Legal User Guide

Release 16.5

This documentation has been created for software version 16.5.

It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at https://knowledge.opentext.com.

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Table of Contents

Chapter 1
Welcome to OpenText Legal

OpenText Legal is a multi-tenant cloud solution offered under a SaaS (software as a service) license model to provide document management, business process automation, and collaboration capabilities. These features can be consumed completely in the cloud.

OpenText Legal has three primary features:

- Client-matter onboarding
- Matter centric workspaces
- External sharing and collaborating

Challenges addressed by OpenText Legal

Law firms and their clients interact with a lot of content to address areas such as onboarding clients, performing conflict of interest checks, and creating and managing documents.

Law firms need to automate processes

Manual steps can lead to:

- Errors setting up new clients and performing tasks in a timely manner, which can lead to malpractice suits.
- Lack of consistency in their activities from matter to matter.
- Lack of metrics leading to inefficiency.

Law firms need to digitize content

Firms need to digitize to be competitive and need an easy to use solution to manage their documents in a "client – matter" context view.

- By nature of the legal business, firms are inundated with documents and case material.
- Firms are regulated on document security, accessibility, and retention.
- Finding the right document at the right time can be the difference between winning and losing a judgment.

Law firms need virtual document sharing

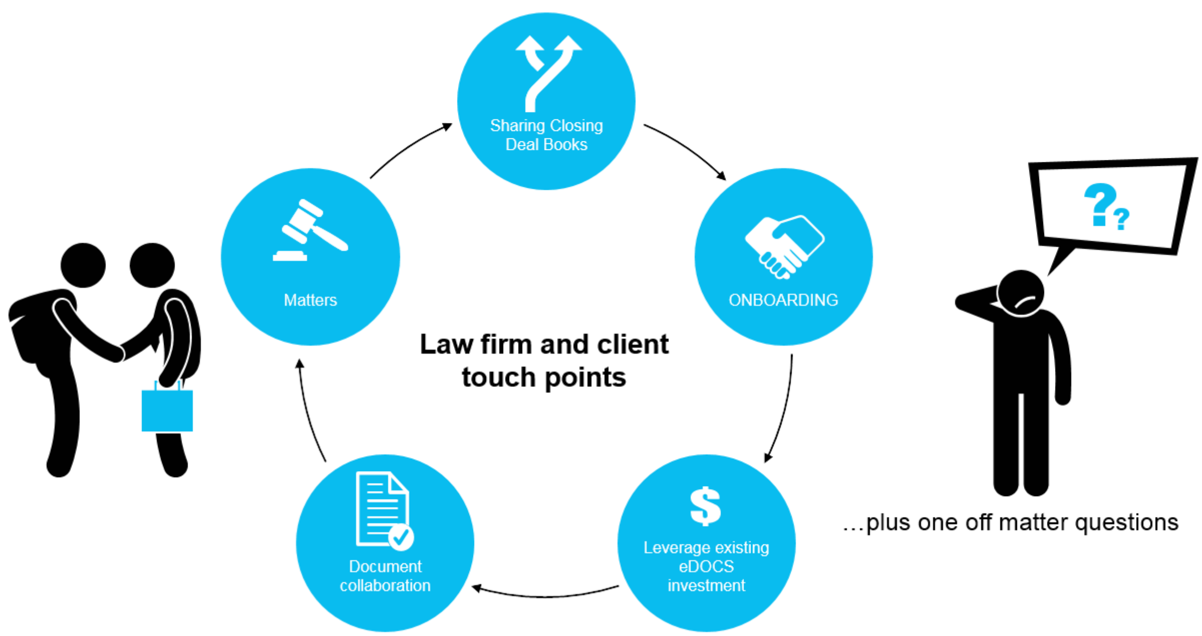
Firms today have problems when collaborating with external parties:

- Limits on email sizes and exchange quotas create problems exchanging documents with clients.
- People are not always working on the same version of a document when using email.
- No controls exist to prevent someone from forwarding an email with a document.
- Users cannot share and collaborate on documents when not connected to email.

What OpenText Legal provides

Law firms and corporate legal departments that want to use a matter-centric document management system hosted in the cloud can better manage their work and have quicker access to information through the OpenText Legal application. OpenText Legal enables users to work with documents related to the client, client matters, and practice areas.

Using a process flow with step-by-step procedures helps to progress things along in a timely fashion.



Platform simplicity

OpenText Legal provides a SaaS DMS (document management system) solution without the hardware cost and IT management burden of an on-premises DMS.

Platform extensibility

Because OpenText Legal is deployed on the OpenText cloud, customers can extend their solution with other OpenText applications such as People Center, Contract Center, and Core. Additionally, customers can extend functionality with their own applications written in low-code AppWorks and consume OpenText Core (content apps that drive productivity and solve business challenges) micro-services. For information about extending functionality written in low-code, see the *AppWorks Platform Low-Code Design Guide* on My Support.

Enhanced personal productivity

Anywhere, anytime access to OpenText Legal increases the attorney's productivity and responsiveness to client requests.

Enhanced law firm productivity

OpenText Legal enables law firms to easily set up their client, matter, and practice areas and manage their clients' documents.

Automated client-matter onboarding process

OpenText Legal process flows aid in the onboarding process for new or existing clients and their associated matters. Flows initiate the conflicts check procedure and help to ensure that users adhere to regulatory procedures and best practices.

Features and benefits of the process include:

- Check for conflict of interest (for new client matters) and credit (for a new client).
- Track task progress through the onboarding dashboard.
- View status to see what has been completed and what is outstanding in the process.
- Maintain a historical audit of the customer onboarding interaction.
- Utilize reports to help firms understand what activities can be optimized to improve client interactions.

When the new matter is approved, the client-matter workspace is created, ready for uploading matter documents. See Initiating a client-matter workflow.

Client matter centric

During and after the setup of a client and new matter, the next step is to capture, organize, and index content (documents, emails, files, images). The client matter workspace is where users can create, populate, and edit documents. Additionally, users can share and collaboratively edit documents using Office 365.

Virtual document sharing and collaboration

Firms need to share content with external parties (clients, subject matter experts, opposing counsel, and so forth) in a secure environment where users can perform content editing. Additionally, firms need to capture the final revisions back into their primary archive.

Sharing is made available through:

- **OpenText Core**: OpenText Core is the intermediary for sharing files with external users. The files are posted in Core, and the external user receives an email notification with a link to view the file. See How to send emails with matter attachments.

- **Office 365**: OpenText Legal users and external users can use Microsoft Office 365™ to collaborate and co-author documents. Using Office 365 enables file collaboration with real-time editing by multiple users. Office 365 applications include Excel, Outlook, PowerPoint, and Word. See Office 365: Collaborative editing.
- **Outlook**: Using Outlook, you can save emails and attachments from your Outlook Inbox directly to the OpenText Legal client-matter workspace. See Outlook: Saving emails and attachments to the matter workspace.

See Sharing and collaborating.

Chapter 2

Touring the workspace

The OpenText Legal workspace displays your dashboard with recently accessed documents, clients, matters, assignments, and requests. This chapter explores the workspace.

Signing in to OpenText Legal

OpenText Legal uses OpenText Core to validate your user name and password. After you enter your credentials in Core, the OpenText Legal dashboard is displayed.

To sign in:

1. From your browser, go to the URL provided by your administrator.
   The OpenText Core credentials page appears.
2. From the OpenText Core credentials page, type your user name and click **Next**.
3. Type your password.
   Sign in becomes available.
4. Click **Sign in**.

The OpenText Legal application launches and displays your dashboard.

Changing your password

The password you use to sign in to OpenText Legal is permanent and never expires.

Note: The following procedure assumes that you are using OpenText Core authentication, and not another authentication method, or single sign-on.

To change the password:

1. Sign in to OpenText Core at https://core.opentext.eu (for users in the European DPZ) or https://core.opentext.com (rest of the world).
2. Click your profile picture.
3. Select **Profile**> **Settings**.
4. In **Account** > **Settings**, click **Change Password**.
   The password fields appear.
5. In **Current Password**, enter your current password.

6. In **New Password**, enter your new password.
7. In **Confirm New Password**, repeat your new password.
8. Click **Save**.

Your password is changed.

Dashboards

Dashboards provide the view to your work. Additionally, all OpenText "Center" applications are dashboard centric.

OpenText Legal provides various dashboards for performing work: onboarding tasks, administering requests, and monitoring status. The following dashboards are available depending on your role assignment:

- Legal Home
- Legal Admin
- Client Matter Onboarding

All users have the Legal Home dashboard.

To switch to a different dashboard:

1. From any page, in the header, click (dashboard selector)
   A list of dashboards is displayed for users assigned the Legal User, Legal Admin, or Legal Tenant Admin role.

2. Select a dashboard.

Note: Most OpenText Legal users will see only the Legal Home dashboard because they do not have the roles that enable the other dashboards.

Note: For users with roles in other "Center" applications, you will see additional dashboards for those applications.

Tiles

The following table describes the OpenText Legal tiles. The tiles are displayed on the various dashboards: Legal Home, Legal Admin, and Client Onboarding Manager.

Dashboard	Icon	Tile name	Purpose
Legal Home		Welcome	The Welcome tile displays your user name and provides access to OpenText Legal Help. See Help.

Dashboard	Icon	Tile name	Purpose
			Additionally, you can access the Create Client matter form directly from this tile.
Legal Home		Recently Edited Documents	Recently Edited Documents is auto-populated with documents that you recently added or edited.
Legal Home		My Requests	My Requests is a list of onboarding requests that you initiated or are the *Requested By* user. From this tile, users can easily view the status of the onboarding or access any matter related tasks assigned to or to their roles for a matter.
Legal Home and Legal Admin		Clients	The Clients tile contains the list of clients with their unique client ID. You can view a list of clients or view a specific client.
Legal Home and Legal Admin		Matters	The Matters tile contains the list of client matters and their unique matter ID for a client. From here you can view the overall flow of the matter, status of tasks, and manage documents.
Legal Home		My Assignments	My Assignments lists the tasks that are assigned to you or that are open and ready to be claimed by you or users with your role.
Legal Admin		Practice Areas	Practice areas comprise document types and a workflow with detailed tasks associated with the specific matter type. You associate a matter with a practice area when creating the new matter.
Legal Admin		Document Types	One or more document types are associated with a practice area. When you add content to a matter, you must specify which document type to use (of those associated with the matter's practice area).
Client Matter Onboarding		Requests	The Requests tile shows open, completed, and rejected onboarding requests.
Client Matter Onboarding		Tasks	The Tasks tile shows all tasks, open tasks, tasks that are due soon, overdue tasks, and completed tasks of onboarding requests.
Client Matter Onboarding		Open Onboarding Requests by Stage	Presents a pie chart view of all open onboarding requests by stage.

Dashboard	Icon	Tile name	Purpose
Client Matter Onboarding		Open Onboarding Tasks	Presents a bar chart view of all open onboarding tasks.

To view a list of tile entries from the Legal Home dashboard:

1. From Legal Home, pause on any tile title.
   Notice that the tile title is clickable.
2. To view the full list of entries for a tile, click a tile title.

When you click the tile title, a new window opens displaying all the entries related to that tile. For example, if you click the Matters tile title, a new window opens with a list of all matters.

To navigate directly to an individual item in the tile list:

- Click an item in the tile list.

The item opens.

Breadcrumbs

Breadcrumbs appear when you are in the details within a tile such as client matter requests. Use the breadcrumb links to navigate the workspace quickly.

Create a new item

All dashboards provide the capability to create a new item, such as client matter requests, new matters, or new clients.

To create a new item:

1. From any page, in the header area, click + (Create a new item).

2. From the list, select one of the following options: Client, Client matter, Document type, Matter, or Practice area. For users with the role Legal Manager or higher, you will also

see additional entries.

3. Complete the form and click **Create** or **Save and create another**.

Note: Your list will vary depending on your assigned role. Users with the Legal User role will only see Client and Matter.

Showing and hiding columns

From the tile list, you can control the columns that are displayed. For tiles on the Legal Home dashboard, you must first open the tile to show or hide columns.

To show or hide columns:

1. For Legal Home tiles, to open the tile, click the tile title.

   The tile opens with the Select columns icon. For other dashboards, the Select columns icon is immediately available.

2. From the tile list, click .
   The Show / Hide columns list is displayed. Available columns depend on the selected list.
3. To change the columns that are displayed, select or clear the check box.
4. Click **Apply** to apply changes.
5. Click **Reset** to revert to the default display.

The displayed columns change.

Sizing the tile window

Sizing the tile window applies to tiles on the Legal Admin and Client Matter Onboarding dashboards. Sizing does not apply to the Legal Home dashboard.

To size the tile window:

1. Drag the window edge to re-size.
2. Alternatively, click to maximize the tile.
3. Click to reset the tile size.

Filtering lists

You can filter the list of items presented in tiles to limit your display results. You can filter directly in the tiles from the Legal Admin and Client Matter Onboarding dashboards. To filter tiles on the Legal Home dashboard, you must first open the targeted tile.

To filter a list:

1. For Legal Home tile, to open the targeted tile, click the tile title.
   The tile opens showing the filter icon. Other dashboard (Legal Admin and Client Matter Onboarding) tiles are ready for immediate filtering.
2. Click (Filter).
   The available options depend on the tile columns. For example, Recently Edited Documents has Typist, Last modified by, Last modified date, File name, and so forth.
3. In the Filter options, provide a value or date (using the date picker).
4. Specify **Equal to** (default), **Range**, **Not equal to**, or **Advanced**.
5. Click **Apply**.

The results are displayed.

To remove a filter:

- Click the **X** above the ribbon.

To close the filter pane:

- Click (Filter).

Exporting a comma-separated value list

You can export items listed in a tile to a comma-separated value list. The file takes the name associated with the tile and any relevant tab and has a file extension of `.csv`.

For tiles on the Legal Home dashboard, you must open the tile before the export icon becomes available.

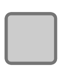
To export a file as a comma-separated value list:

- On the tile bar, click (Export results as comma-separated value list; up to 5000 rows).

The file is downloaded and made available through your browser download mechanism.

Using forms

The following table describes the various functions available in forms.

	**Create** provides options for creating items. You can simply create the new item (click Create), create and open the new item, and save and create another item. Complete the form fields. Form fields with red asterisks are required. Select the appropriate action: Create, Create and open, or Save and create another. **To select an action, click** **:** Select an action: ▪ Create and open ▪ Save and create another
	**Maximize** the form
	**Minimize** the form.
	**Browse** for an existing value.
	**Create** a new item while in the form.
	More provides viewing options.
	Select the check box to perform a function on the entry, such as **Clear**.
	**Collapse** the list of items.
	**Expand** the list of items.

Auto-save

Your work is automatically saved while working in OpenText Legal; there are no save buttons. "Saving" is displayed temporarily across the application's toolbar as you apply changes.

Accessing Help

OpenText Legal provides online help from the Welcome tile on the Legal Home dashboard.

To access help:

1. From **Legal Home**, in the **Welcome** tile, click **Help**.
   The OpenText Legal Help opens in a new window.
2. To navigate the help system, select topics in the topics list pane or use **Navigate Previous** and **Navigate Next** in the topic toolbar.
3. To search topics, use the **Search** box.

You can also view the *OpenText Legal User Guide* on My Support.

Chapter 3
Getting started

As a new user of OpenText Legal, you need to know where to start. This section presents an overview of the application to help you understand the primary functions, how user roles determine your actions, and how to navigate the interface.

Primary functions

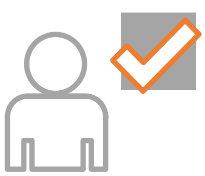
The primary functions in OpenText Legal are:

- Onboarding a new client-matter workspace
- Working with the client-matter workspace
- Sharing files

Before you begin working with these functions, it is helpful to review the interface to understand how you perform work. You need to know your user role, your available dashboards, and how to navigate the various tiles.

User roles

User roles determine what you see and what you can do with the application. See User roles.



· What can you see?
· What can you do?

Dashboards

You need to understand the flow of information and the areas of the interface that are important to help you get your work done. See Using the dashboards.

· What is a dashboard?
· How do I navigate?

Tiles

Dashboards are comprised of tiles. For example, the Legal Home dashboard contains tiles for assignments, recently edited documents, requests, clients, and matters. See Tiles.

Doing the work

Workflows and their tasks drive your work. Tasks are assigned to roles or individuals. Your tasks appear as entries in the My Assignments tile.

- For most users, you will perform the majority of your work from the My Assignments tile within the primary dashboard, Legal Home. See Using the Legal Home dashboard.
- For users with elevated roles, you will perform much of your work from the Legal Admin or the Client Matter Onboarding dashboards.

User roles

OpenText Legal has defined user roles to provide control for onboarding new clients and matters, client matter management, and content management. The following roles determine user access to various dashboards to perform client matter management and document operations:

- Legal User
- Legal Manager
- Legal Admin
- Legal Tenant Admin

The following diagram illustrates the ascending order of roles. For example, the role Legal Manager is an elevated role that also includes permissions of the Legal User role.

Role assignment to users and groups is performed outside of the OpenText Legal application and is established by your organization administrator or manager. For additional information about the OpenText Legal roles, see the topic User roles.

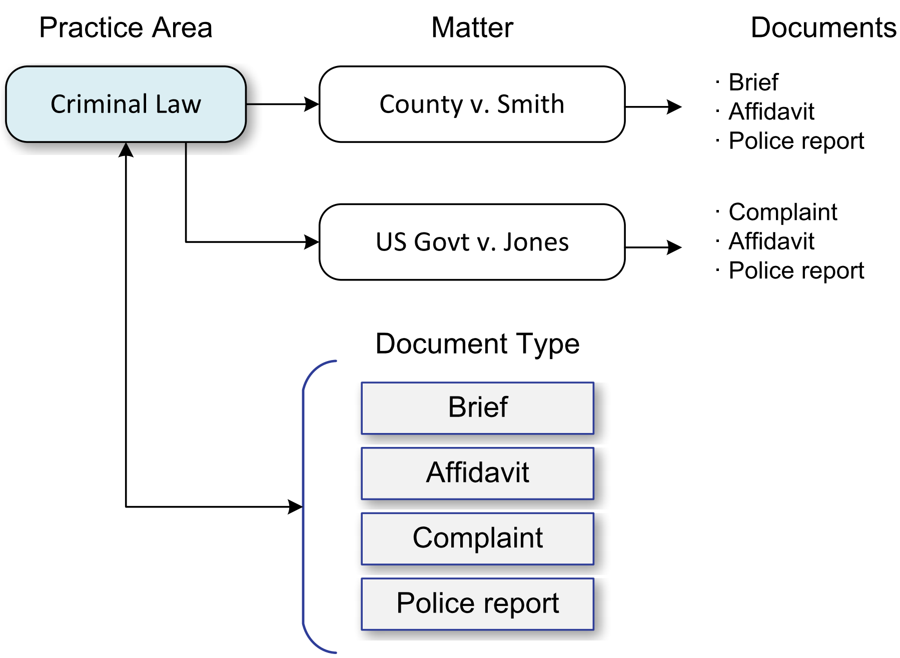
Preparing a new environment: Practice areas and document types

Before you can begin onboarding clients and matters, you must first create practice areas and document types.

Practice areas have an associated workflow. OpenText Legal provides two workflow entity items: Mergers & Acquisitions and Criminal. You must choose one of the two.

- One practice area is associated with a matter.
- Several document types can be associated with a practice area. Similarly, a document type can be associated with several practice areas.

The following diagram is an example of a practice area and its associated document types. To further illustrate the relationship, sample matters are shown as they relate to the practice area and matter documents.



You must add practice areas before you can initiate a client-matter onboarding request. You can also associate document types while adding the practice area.

To add practice areas:

- See Adding practice areas.

You can associate a document type with a practice area while adding the document type.

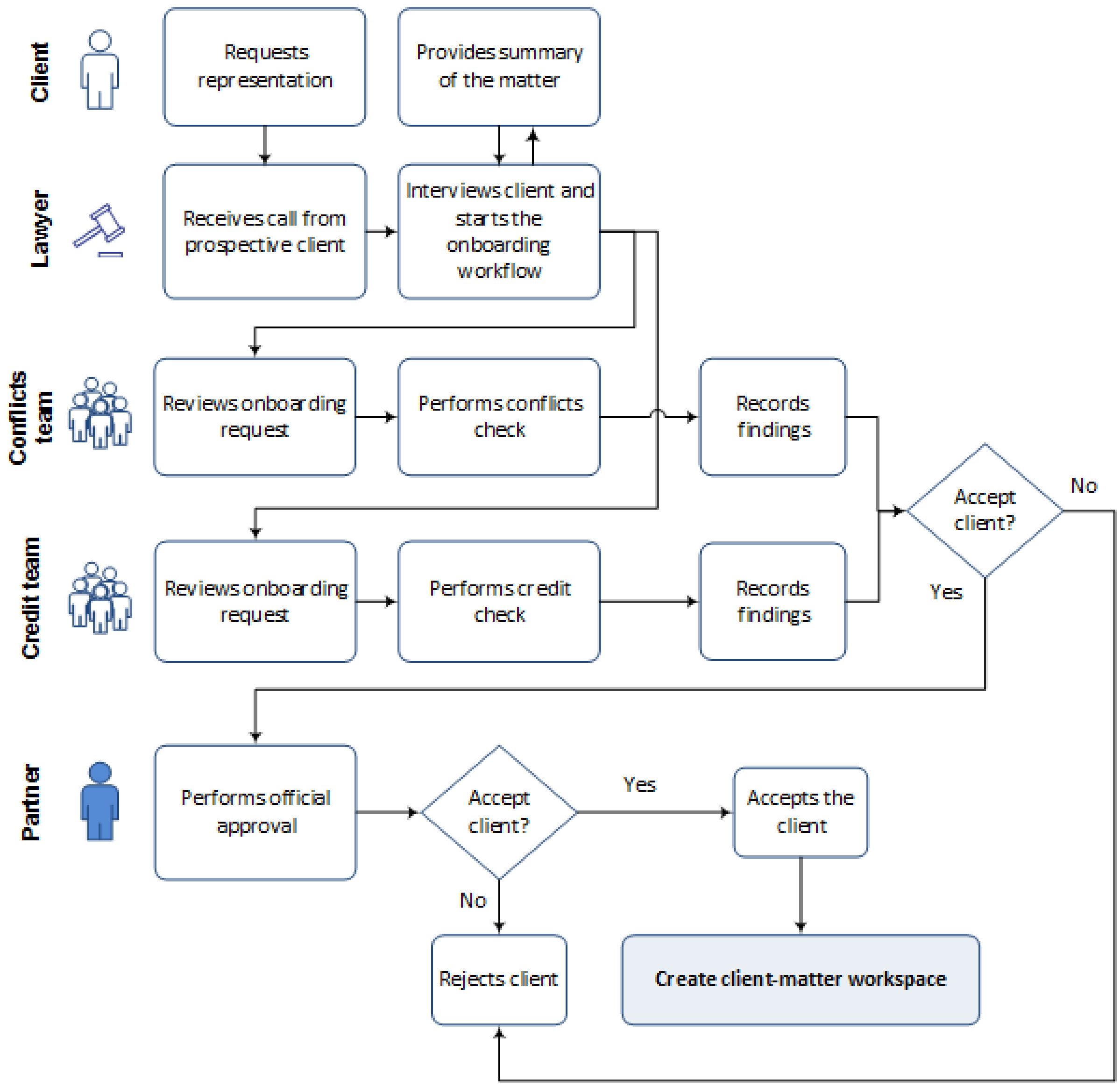
Important: For the Outlook add-in, create the document type that matches what you configured in the Outlook add-in on the server. For example, the document type **Email** is the logical document type. Create the Email document type and associate it with all practice areas. If you do not create the **Email** document type, you can select an existing document type when saving an email from the Outlook add-in.

To add document types:

- See Adding document types.

Onboarding a new client matter

Onboarding is the first step to initiate the setup of a new client-matter workspace. In OpenText Legal, the client-matter onboarding request starts the workflow. The objective is to either approve or reject the onboarding request. The request can be rejected at any stage in the process.



The onboarding process is guided by specific tasks controlled by the client-matter onboarding workflow. As a task is completed, the onboarding process progresses.

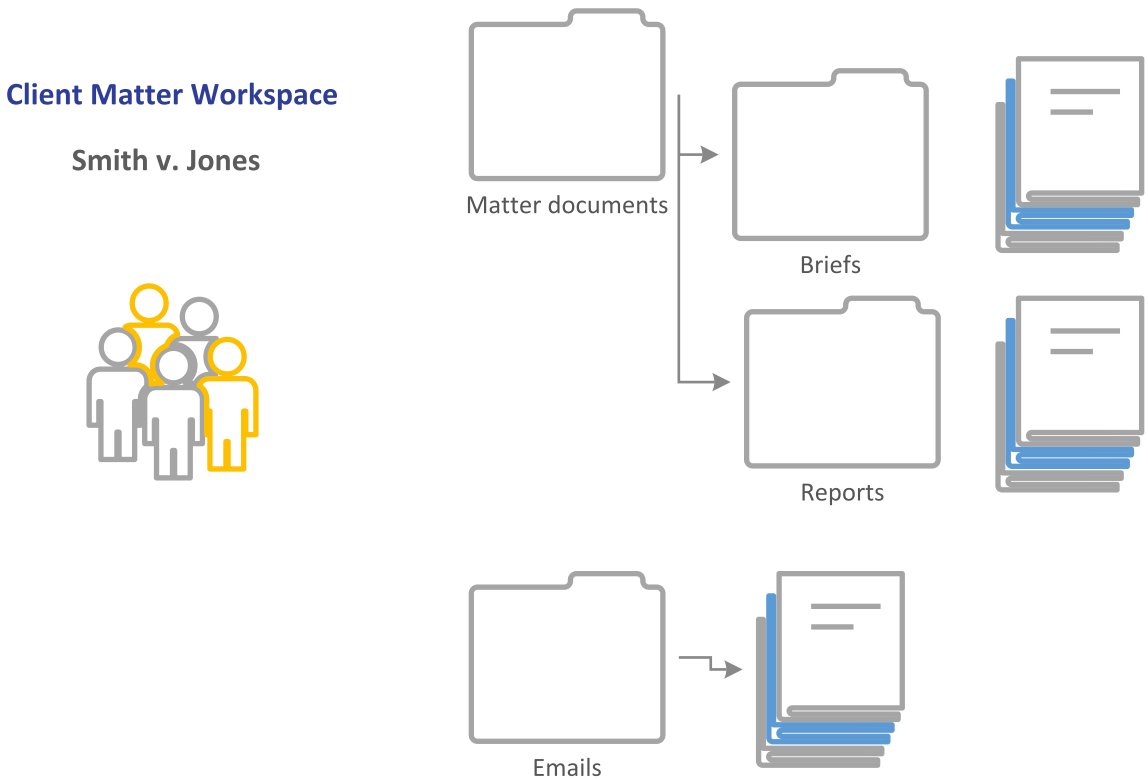
The client onboarding process follows these steps:

1. Initiate a client-matter onboarding request by recording information from the new or existing client.
2. Add tasks to the workflow for performing conflict of interest and credit checks (if required).
3. Perform the conflicts check and credit check (performed outside of OpenText Legal).
4. Complete the tasks and note your findings.
5. It is possible to reject the client matter request based on the conflicts check or the credit check.
6. Review the findings.
7. Approve or reject the client matter request.
8. An email notification is sent to the onboarding workflow initiator and requestor to inform them of the approval or rejection of the client matter.

If approved, the onboarding process adds the client (if a new client) to the OpenText Legal database and creates a new matter entry.

Working with the client-matter workspace

Within the client-matter workspace, you work with files specific to each matter. For example, for a matter named *Smith v. Jones*, you can access only the files that apply to that matter. You can also organize the files to fit your preference by adding sub-folders. This custom organization helps you in your daily activities to quickly add, edit, save, and find files.

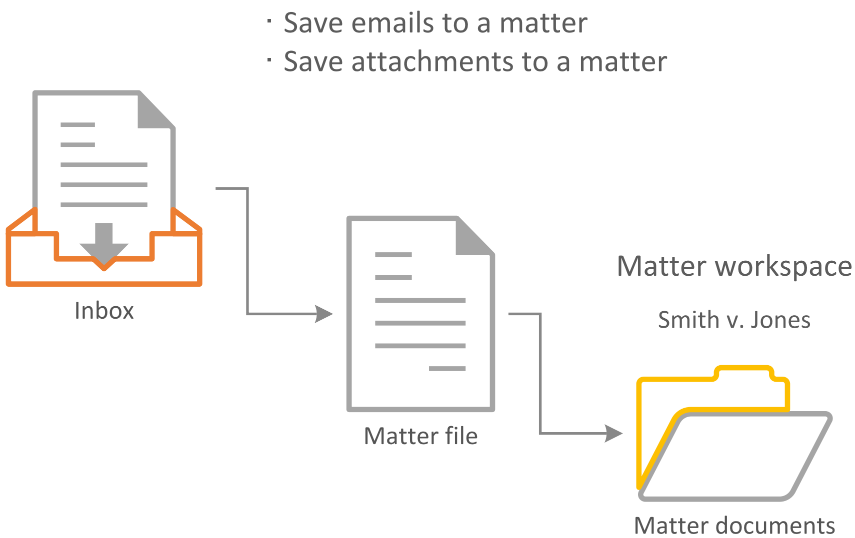


Daily activity might include adding and editing workspace files and sharing files with external parties. You can use the internal email features of OpenText Legal to share files or use the Outlook add-in to save received matter files from an incoming email directly to the matter workspace.

For additional information about working with matter files, see Working with the client-matter workspace.

Saving files from Outlook

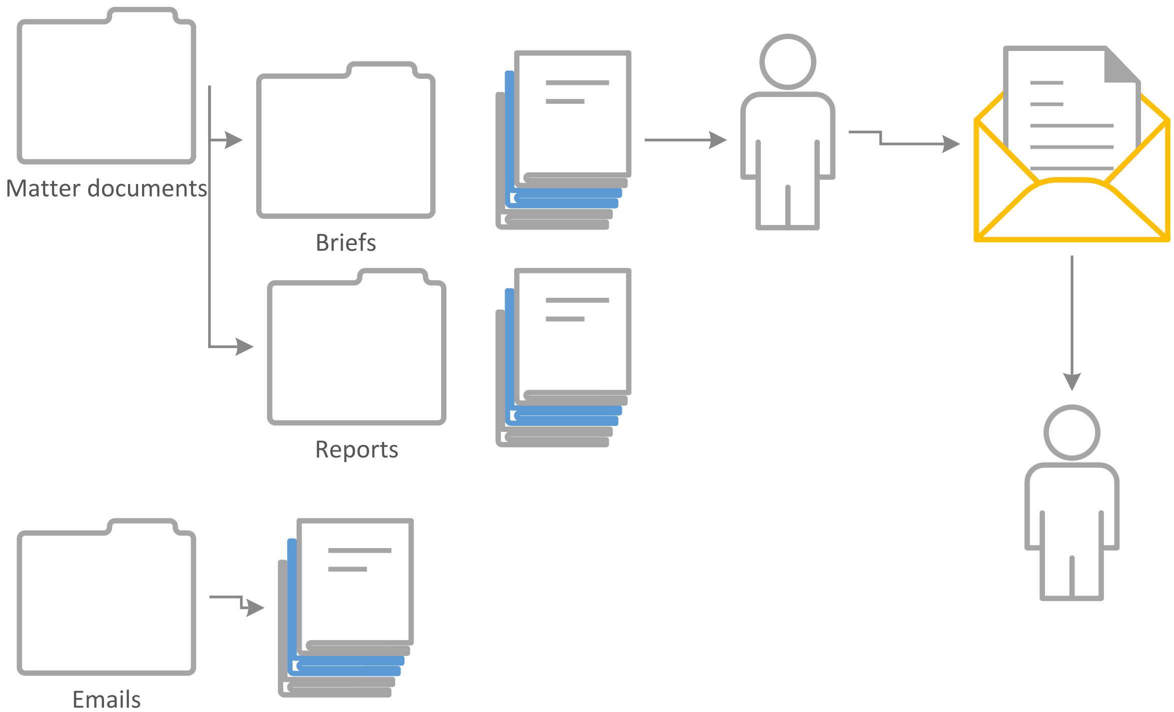
You can save email messages and attachments to any client-matter workspace directly from Outlook. This process works for both the Outlook client and the Outlook web client using Office 365.



For more details on how to share files, see Sharing and collaborating.

Sharing files with external users

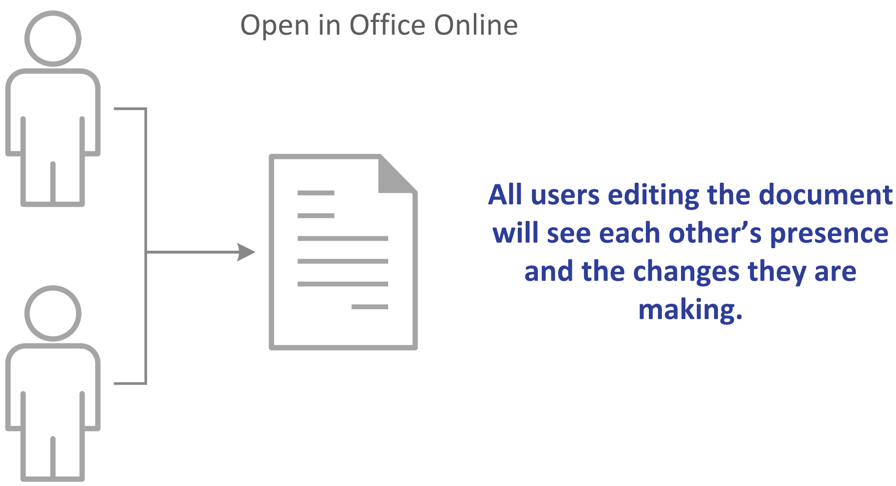
When you share files with external users, an email is generated, providing the recipient a link to the shared file. The recipient can link to the file from the email notification.



For more information on how this works, see Sharing documents.

Collaborative editing

From within OpenText Legal, you can collaborate on documents using the action **Open in Office Online**. Collaborators must be OpenText Legal users and have a license for Office 365 to include Word.



As you edit the Word document, all collaborators can see each other's presence and the edits they apply.

Chapter 4

Using the dashboards

OpenText Legal provides multiple dashboards as a view to your workspace:

- **Legal Home** is your primary workspace for interacting with your clients or matter documents, accessing tasks, and viewing the status of onboarding requests. You can also view your recently edited documents, matters, and clients. All users can access Legal Home. See Legal Home dashboard.
- **Legal Admin** is where managers administer (add, delete, edit) clients, matters, practice areas, and document types. You need the role of Legal Admin, Legal Manager, or Legal Tenant Admin to access this dashboard. See Legal Admin dashboard.
- **Client Matter Onboarding** is where managers monitor the status of onboarding requests and tasks. You need the role of Legal Admin, Legal Manager, or Legal Tenant Admin to access this dashboard. See Client Matter Onboarding dashboard.

Using the Legal Home dashboard

Legal Home is your primary dashboard for interacting with your clients or matter documents, accessing tasks, and viewing the status of onboarding requests.

On the dashboard, you work from items presented in the tiles:

- **Recently Edited Documents** is a list of documents that you have added or recently edited. Use this list as a quick path to resume your work.
- **Welcome** provides a link to Help.
- **My Requests** presents request that you initiated or were requested on your behalf. See My Requests.
- **My Assignments** presents tasks that are assigned to you or are waiting to be claimed by users with your role. See My Assignments.
- **Clients** presents a list of clients. See Clients.
- **Matters** presents a list of matters. See Matters.

Tile: My Assignments

My Assignments acts as a "to do list" for users with your role and as a "my list" for you. My Assignments presents:

- **All** tasks assigned to you as an individual, and
- **Unclaimed tasks** for users with your role. The unclaimed tasks are available and ready to be claimed by users with your same role.

To view assignments:

1. Click the My Assignments tile title.
   The **My Assignments** tile opens showing two tabs: **My assigned tasks** and **My role tasks**.
2. To view all tasks assigned to *you*, click **My assigned tasks**.
3. To view all tasks assigned to *your role*, click **My role tasks**.

Opening a specific task enables you to claim, start, complete, or view task history.

Task states: My Assignments

When viewing tasks in the My Assignments tile, you see icons associated with each state. My Assignments states comprise Created, Assigned, In Progress, and Suspended. Tasks move through these states naturally except for the Suspended state.

The following table describes the task states for the My Assignments tile.

Icon	State	Description
	Created	The task is assigned to your role and has not been claimed by an individual.
	Assigned	The task has been claimed and is assigned to you.
	In Progress	The task has been started.
	Suspended	An assigned task has been suspended. You do not need to work on this task. The task can be resumed from the My Assignments tile. See Suspend / Resume.

Working from My Assignments

After a client-matter onboarding request is completed, the associated practice area workflow triggers tasks. The tasks are presented in My Assignments as either assigned to you or waiting to be claimed by users with your role.

From My Assignments, you claim a task, start the task, and eventually complete the task. The objective is to claim the task and start the work so that it can progress through the workflow. Additionally, you can perform many actions on tasks from **My assigned tasks** and **My role tasks** tabs when you open the My Assignments tile. See Working from the tile title: My assigned tasks and My role tasks.

Claiming and starting tasks

Tasks that are waiting to be claimed by users with your role are displayed with . You must claim the task before you can start working on it.

To claim a task:

1. From **Legal Home**, in **My Assignments**, click the tile title.
   The **My Assignments** tile opens with two tabs: *My assigned tasks* and *My role tasks*. You may find it easier to locate tasks from this view.
2. To claim a task assigned to your role, click the **My role tasks** tab.
   When you select a task, a new page appears with options to Claim the request, view History, or Add tasks. The status is **Created** and **Assigned to** is blank because no one has claimed this task.
3. Click **Claim**.
   The status changes to **Assigned** and **Assigned to** changes to your name. Now that you have claimed the task, you can start the work. If you view the task now in My Assignments, you see , which means the task is assigned to you.
4. Click **Start**.
   The status changes to **InProgress**.
5. Go to **Legal Home** and view the entry in **My Assignments**.

The task that you just started shows the icon .

Modifying the due date

You can modify the due date for a task.

To modify the due date:

1. Click the task.
2. Click **Modify due date**.
   The **Modify due date** form opens.
3. Select a new date and time.
   When a valid date is selected, **Modify** becomes available.
4. Click **Modify**.

The Due date now reflects the new date.

Note: When the due date has passed, the due date changes to red.

Completing and closing tasks

When you have completed the task, you can provide notes and close the task. Notes are visible from all related tasks and are especially helpful when the *Review request* task is opened.

To complete a task:

1. Open the task.
   The **Task information** page appears.
2. In **Task comments**, provide any relevant notes.
3. Click **Complete**.
   The status changes to **Completed**.
4. In the breadcrumbs, click **Home** to return to the Legal Home dashboard.

The next task in the workflow appears in My Assignments, ready for someone to claim and start working on the task.

For more information about the workflow summary, see Workflow summary and tasks.

Viewing task history

Task history provides the modified date, the action performed, and modified by user information. You can also print task history.

To view and print task history:

1. From an open task, click **History**.
   The **History** form opens.
2. Scroll through the items to view or print history.

Opening My Assignments: My assigned tasks and My role tasks

From My Assignments, you can view your assigned tasks and tasks that are assigned to users with your role. Additionally, you can perform actions on tasks from this view.

To view all tasks assigned to you:

1. From **Legal Home**, click the tile title **My Assignments**.
   The My Assignments page is displayed with two tabs: My assigned tasks and My role tasks.
2. Click **My assigned tasks**.
   The list of tasks that are assigned to you is presented.

To view all unclaimed tasks for users with your role:

1. From **Legal Home**, click the tile title **My Assignments**.
   The My Assignments page is displayed with two tabs: My assigned tasks and My role tasks.
2. Click **My role tasks**.
   The list of unclaimed tasks for users with your role is presented.

To perform actions on tasks:

1. From **My role tasks** or **My assigned tasks**, select the check box beside a task.
   The following table lists the available actions and either the results of the action or additional procedures.

Action	Results and procedures
Open	Open the task.
Print	Print the task.
Claim	Claim the task. This action assigns the task to you. The next actions appear: Start and Complete.
Assign	Assign the task to an individual with the same role. The **Assign task** form opens: 1. Select a user. 2. Click **Assign**.
Suspend / Resume	Suspends the task and resumes the task. These actions act as a toggle; when you Suspend, Resume becomes available.
Skip	The **Skip task** form opens: 1. Provide a reason for skipping. *Required*. 2. Click **Skip**. Once a task is skipped, it becomes a non-workable task and becomes Obsolete. The matter activity flow advances to the next task in that state, or to the next state.
Start	Start the task.
Complete	Complete the task.
Delegate	Delegate solicits help from another user while you retain ownership of the assignment. The **Delegate** form opens: 1. In **Delegated to**, select a user. 2. In **Reason for delegation**, provide a reason. 3. Click **Delegate**.

Action	Results and procedures
Forward	Forward transfers ownership of an assigned task to someone else. The **Forward task** form opens: 1. In **Forward to**, select **User** or **Role**. ▪ For **User**, select a user. ▪ For **Role**, select a role. 2. In **Reason for forwarding**, provide a reason. 3. Click **Forward**.
Modify start date	The start date should be earlier than the due date of the selected task and greater than the current date. You cannot modify the start date of an In-Progress task or activity. The **Modify start date** form opens: 1. In **Start date**, select a new date and time, and click **Done**. 2. Click **Modify**.
Modify due date	The **Modify due date** form opens: 1. In **Due date**, select a new date and time, and click **Done**. 2. Click **Modify**.
Properties	The Properties form opens. ▪ View the information and click **Close** when done.

Tile: My Requests

The My Requests tile provides insight into the stage of client-matter onboarding requests. Knowing the request status is particularly helpful when you are not part of the onboarding process, meaning that you cannot access the Client Matter Onboarding dashboard and you do not see the onboarding tasks in My Assignments.

Legal User role: Initiator of a client-matter onboarding request

Users with the Legal User role can initiate a client-matter onboarding request. However, these users cannot administer the request. Additionally, with the Legal User role, you cannot access the Client Matter Onboarding dashboard. Therefore, the My Requests tile provides the ability to view status and monitor progress from the Legal Home dashboard.

For users with Legal User role, the entries in My Requests are:

- Requests that *you* initiated (from the Create Client Matter form).
- Requests submitted by another user on your behalf. Your user name would have been selected in the *Requested by* field on the Create Client Matter form.

My Requests entries and stage

The entries in My Requests reflect the name of the client-matter onboarding request and the stage. For example, *Smith v. Jones* and **New Request**.

Task states: My Requests

Entries in My Requests only show the onboarding request such as *Smith v. Jones*. To see the request's tasks and the task states, you must open the request. See Working from My Requests.

Task states for My Requests entries are Created, Assigned, In Progress, Completed, and Obsolete. Tasks move through these states naturally except for the Obsolete state.

The state icons are visible when you view the properties of a request (after you open a request from the My Requests tile). The icons appear in the Status column, in the Tasks pane. Additionally, from the Tasks pane, you can easily claim, start, and complete tasks.

Icon	State	Description
	Created	The task is assigned to your role and has not been claimed by an individual.
	Assigned	The task has been claimed and is assigned to you.
	In Progress	The task has been started.
	Completed	The task has finished.
	Obsolete	Obsolete tasks are those which: ■ Have been skipped. ■ Had a status of Created, Assigned, or Started when its associated request was rejected. The obsolete task is created when an onboarding request is rejected and is marked as Rejected. No action is required. All tasks in the request whose status was not Completed, change to Obsolete. You can also make a practice area activity flow task obsolete when you select Skip. The task becomes Obsolete, and the matter activity advances to the next task or state. See the *Skip* action in Working from the tile title: My assigned tasks and My role tasks.

Viewing My Requests entries

From Legal Home, you see entries in the My Requests tile. Another view into My Requests is from the opened tile by clicking the tile title. From the opened tile, you can see all the entries in My Requests.

To view the My Requests entries:

1. From **Legal Home**, click the tile title **My Requests**.
   The **My Requests** tile opens with the list of requests.
2. To perform an action on a request entry, select the check box beside a request.
   Available actions are displayed across the top of the list:

Open	**Open** the request.
Delete	**Delete** the request. Must have the Legal Admin role. **Note:** This action makes any outstanding tasks Obsolete.
History	**View** and **Print** history of the request.

The most common action is to open a request so that you can view the related tasks.

To open a request:

- Click the request or select the check box beside the entry and click **Open**.

The Properties and Tasks panes are displayed.

Working from My Requests

You can administer requests from My Requests if you have the Legal Manager role. Additionally, for users with the Legal Manager role, you may find it easier to work from the Client Matter Onboarding dashboard.

View a request and associated tasks

To view a request and its associated tasks:

1. From **My Requests**, select the request (example *Smith v. Jones*).
   The request is displayed showing Properties and Tasks.
2. From the **Tasks** pane, you can:
   - **Open** a task
   - **Claim** a task
   - **Start** a claimed task
   - View task **History**

Claim, start, and add tasks

Procedures for claiming, starting, and adding tasks are described in Claim the request and Add follow up tasks.

When tasks are completed, a new entry **Review request** appears in My Assignments.

Review and approve the request

Procedures for reviewing and approving the request are described in Review and Final approval.

Tile: Recently Edited Documents

The Recently Edited Documents tile lists documents that you have added or recently edited. The list is sorted by the most recent until the pane is filled. You can use this list as a quick approach to resume your work.

You can select a file directly from the tile list on the Legal Home dashboard, or you can view a list of all the recently edited documents by clicking the tile title. The available actions using either approach are the same.

When you select an entry, you can see additional information: Document ID, Title, File name, Author, Document type name, Matter name, Client name, Practice area name, Typist, Created date, Last modified by, and Last modified date.

To resume work on a specific document:

1. From **Legal Home**, in **Recently Edited Documents**, click a file.
   The document metadata is displayed on the left, and the document is displayed in the preview pane on the right.
2. From here you can select an available option on the right, such as **Open in Office Online**, **Share externally**, and so forth. See Working with matter files for a full list of actions.

For additional details on what you can do with documents, see Working with the client-matter workspace.

To view the list of all recently edited documents:

1. From **Legal Home**, click the tile title **Recently Edited Documents**.
   The tile is displayed showing all recently edited documents.
2. Locate an item and select the check box beside the entry.
   Multiple actions become available and are displayed across the top. See Working with matter files for a full list of actions.

For additional details on what you can do with documents, see Working with the client-matter workspace.

Tile: Clients

The Clients tile presents a list of clients showing entries until the tile is filled. You can view a client directly from this tile or a full list by opening the Clients tile. See Viewing clients.

Who can do this?

Access to actions while working in the Clients tile depends on your role assignment.

Role	Capabilities
Legal User	View only
Legal Manager	View, create, edit, disable
Legal Admin	View, delete, create, edit, disable

Viewing clients

You can view clients from the Clients tile on the Legal Home dashboard, or you can view clients from a longer list when you open the Clients tile.

To view clients from the expanded tile:

1. From **Legal Home**, click the **Clients** tile title.
   The Clients tile opens.
2. From the list, locate the targeted client.
3. Perform one of the following:
   - Click a client entry.
   - Or, select the check box beside the entry and click **Open**.

   Both actions open the client record for viewing. The Properties tab view is displayed. You can view client name, client ID, description, and the disabled indicator.
4. Click the **Matters** tab to view the associated matters for the client.
   - From the matters list, locate a matter.
   - Click to view some of the matter details: matter name, matter ID, description, and practice area.
5. Click the **Contacts** tab to view contact information for the selected client.

For more information about managing clients, see Tile: Clients.

Tile: Matters

The Matters tile presents a list of client matters with a unique matter ID for that client. The Matters tile presents a list of matters until the tile is filled. To see all matters, you can expand the tile by clicking the tile title. See Working from the Matters tile.

Who can do this?

Access to actions while working in the Matters tile depends on your role assignment.

Role	Capabilities
Legal User	View, process tasks

Role	Capabilities
Legal Manager	View, create, edit, disable, process tasks
Legal Admin	View, create, edit, disable, process tasks

Working with matters

The Matters tile is the client-matter workspace where you manage files for each client matter. From the Matters tile you can:

- View the workflow summary of the matter and the associated tasks.
- View and download matter files.
- Add files to the matter workspace.
- Edit, share, and move files.
- Compare and collaboratively edit documents.

See Working with the client-matter workspace for details on working with matters.

Using the Legal Admin dashboard

Administration for OpenText Legal is performed using the Legal Admin dashboard.

From the Legal Admin dashboard, you can administer:

- Clients
- Matters
- Practices Areas
- Document Types

To access the Legal Admin dashboard:

1. From any page, in the header, click .
   The list of dashboards appears.
2. Click **Legal Admin**.

Users with the Legal User role do not have access to multiple dashboards.

Who can access the Legal Admin dashboard?

Users with the following roles can access the Legal Admin dashboard:

- Legal Manager
- Legal Admin

- Legal Tenant Admin

Tile: Clients

OpenText Legal administrators manage clients from the Clients tile in the Legal Admin dashboard. Managing clients includes adding, editing properties, disabling, and deleting.

- **Adding clients**: You can add clients directly from the Clients tile on the Legal Admin dashboard versus using the client-matter onboarding process.
- **Changing client metadata**: After a client has been added to the database, you may need to edit specific metadata such as contact information.
- **Disabling or deleting clients**: You can disable a client from the Properties tab. You can also delete a client directly from the Clients tile.

To view clients:

1. From the Clients tile, locate an entry.
2. Click the client entry.
   The client record is displayed showing Properties, Matters, and Contacts tabs.

From here you can update the client description, update the matter description, and update or add new contacts.

Adding contacts

You can add contacts to an existing client. The contacts can be new or you can browse for an existing one.

To add a new contact:

1. From **Legal Admin**, in the **Clients** tile, locate the client.
2. Click the client entry.
   The client entry opens in the **Properties** tab.
3. Click the **Contacts** tab.
4. Click +.
   New contact fields appear.
5. Complete the fields (at a minimum) for First name, Last name, Email, Phone. Fields with a red asterisk are required.
6. For an existing address, click 🔍.
   The **Select work address** form opens.
7. Select an address and click **Select**.
8. For a new address, click +.
   The **Create address** form opens.
9. Complete the form and click **Create**.

The new contact is added to the client.

To add an existing contact:

1. Click .
   The **Person list** form opens.
2. Select an entry and click **Select**.

The contact information is populated and added to the client.

Adding clients

You can add clients from any page using (Create a new item) or the from Clients tile.

To add a client:

1. From any page, in the header area, click (Create a new item).
2. Click **Client**.
   The **Create Client** form opens.
3. Complete the fields. Fields with a red asterisk are required.

Client ID	Enter the client ID that you use in your billing system. Client IDs are unique and cannot be reused.
Client name	Type the client name
Disabled	Indicate whether the client is active or disabled. **Yes** - Disable the client. The Legal Manager role is required. See Hierarchy of access. **No** - The client is enabled. Default setting.

4. Click **Create**.

The new client is added.

Disabling clients

You need the Legal Manager, Legal Admin, or the Legal Tenant Admin role to disable a client.

To disable a client:

1. From the **Clients** tile, select and open the targeted client.
   The **Properties** tab is displayed.
2. Click **Disabled**.

The client is disabled.

Deleting clients

You need the Legal Admin or the Legal Tenant Admin role to delete a client.

Caution: Do not delete a client if it has associated matters.

To determine if the client has associated matters:

1. From **Legal Home**, click the **Clients** tile title.
   The **Clients** tile opens.
2. From the list, locate the targeted client and click the entry.
   The client page opens with the Properties view.
3. Click the **Matters** tab.
   A list of matters is displayed if any exist.

If no matters are displayed, you can safely delete the targeted client.

To delete a client:

1. From the **Clients** tile, select the check box beside the targeted client.
   The **Delete** option appears across the top of the list.
2. Click **Delete**.

The client is deleted.

Tile: Matters

From the Matters tile, you can add matters directly, bypassing the onboarding process. This approach eliminates the conflict and credit checking. Bypassing the onboarding process may be an appropriate path when the client is established, and the matter is already in progress, and you do not need to perform these checks again. You would directly add a matter when you already have an established database. However, for a new matter, it is recommended to use the onboarding process to ensure that your team has performed at a minimum a conflict of interest check.

Note: After the matter is created, some fields cannot be changed such as Client and Practice area.

To view matters:

1. All matters are displayed in the Matters tile.
2. Move through the list to view the matters.
3. Use (Filter) to control the results.

Opening a matter allows you to:

- View the overall flow of the matter and the lifecycle state.
- View the status of tasks that have been initiated as part of the matter lifecycle.
- View additional information and content.
- Preview, edit, and share documents that are attached to the matter.

See Working with the client-matter workspace.

Adding matters

You can add matters from any page using (Create a new item) from the header area.

To add matters:

1. From any page, in the header area, click + (Create a new item).
2. Click **Matter**.
   The **Create Matter** form opens.
3. Complete the fields. Fields with a red asterisk are required.

Client name	Locate the client in the database. 1. Click **Browse**. The **Clients** list opens. 2. Select a client and click **Select**. The Client name appears in **Client name**.
Client ID	Client ID is auto-populated.
Practice area name	Locate the practice area in the database. 1. Click **Browse**. The **Practice Areas** list opens. 2. Select a practice area and click **Select**. The practice area name appears in **Practice area name**.
Matter ID	Enter the Matter ID. Matter IDs are unique to the client.
Matter name	Enter the Matter name.
Matter description	Describe the matter.
Secured	Secured can be used as a special flag in your organization. Indicate if the matter is secured: ▪ Yes ▪ No ▪ none

4. Click **Create**.

The new matter is added.

Tiles: Practice areas and Document types

Practice areas and document types are required to administer matters:

- One practice area is associated with a matter
- Several document types can be associated with a practice area. Similarly, a document type can be associated with several practice areas.

Step 1: Add practice areas

Your organization specializes in certain practice areas such as administrative law, bankruptcy, or criminal law. Each practice area follows a workflow with detailed tasks that start after onboarding a new client matter to finally closing the matter. Tasks for each practice area can vary. Therefore, you need to assign a practice area to a client matter that reflects the appropriate tasks to keep the case on track.

You must add practice areas before you can initiate a client-matter onboarding request. You can also associate document types while adding the practice area.

To add practice areas:

- See Adding practice areas.

Step 2: Add document types

Next, you need to associate document types to each practice area, such as affidavits, briefs, contracts, and reports. You can associate a document type with a practice area while adding the document type.

Important: For the Outlook add-in, you must add the document type **Email**.

To add document types:

- See Adding document types.

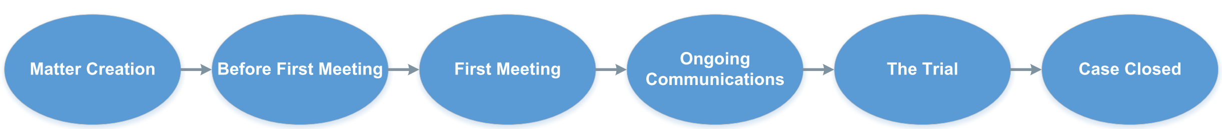
Practice area and workflow tasks

During the client-matter onboarding process, you must indicate a practice area for the new matter. Each practice area has its own unique set of workflow stages. Stages comprise tasks. A workflow stage can have many tasks before the stage progresses to the next.

Sample workflow

The following workflow diagram illustrates the process for a criminal case.

- The first stage is matter creation, comprised of multiple tasks to initiate the workflow.
- After the matter is created, multiple tasks must occur before the first client-attorney meeting such as sending a questionnaire.
- During the workflow there are ongoing communications.



During any stage or task of the workflow, you can view the status using the Workflow summary tab within the matter workspace.

Who can do this?

The following roles can administer practice areas and document types:

- Legal Manager
- Legal Admin
- Legal Tenant Admin

Managing practice areas

Practice areas are listed in the Legal Admin dashboard in the Practice Areas tile. You can view, filter, add, open, and delete from these tiles. All matters created with this practice area follow the same matter workflow for that practice area. See Practice area and workflow tasks.

Viewing practice areas and associated document types

You need the Legal Manager, Legal Admin, or Legal Tenant Admin role to view practice areas and document types on the Legal Admin dashboard.

To view practice areas:

1. Navigate to the **Legal Admin** dashboard.
2. View the lists presented in the **Practice Areas** tile.

To view practice areas and the associated document types:

1. From the **Legal Admin** dashboard, in the **Practice Areas** tile, click a practice area.
   The Practice Area is displayed.
2. In Document Types, you can see the documents types associated with the practice area.

To disassociate a document type from a practice area:

1. From the **Legal Admin** dashboard, in the **Practice Areas** tile, click a practice area.
   The Practice Area is displayed.
2. In **Document Types**, select the check box beside the targeted document type.
   The Clear option becomes available.
3. Click **Clear**.
4. To disassociate all document types from the practice area, select the check box beside **Document type name**, and click **Clear**.

Associating more document types

To associate more document types with a practice area:

1. From the open practice area, in **Document types**, click (Browse).
   The **All Document Types** form opens.
2. In the list, click an entry. You can select multiple entries.
3. Click **Select**.

The selected document type is displayed in the **Document types** list.

Adding practice areas

Tip: Practice areas with their associated document types must exist before you can initiate a client-matter onboarding request.

You need the Legal Manager, Legal Admin, or Legal Tenant Admin role to add practice areas.

To add a practice area:

1. From any page, in the header area, click + (Create a new item).
   The **Recent items** and **All items** lists are displayed.
2. Select **Practice area**. Alternatively, from the **Legal Admin** dashboard, in the **Practice Areas** tile, click + (Create a new item).
   The **Create practice area** form opens.
3. Complete the fields. Fields with a red asterisk are required.

Practice area name	*Required*. Provide the practice area name.
Practice area ID	*Required*. Provide the practice area ID. Request this information from your administrator if not available.
Disabled	Default is No.
Workflow	*Required*. Select a workflow from the list. A practice area must be associated with a compatible workflow. The workflow name may be similar to the practice area.
Document Types	*Optional*. You can associate existing document types when you add a practice area. 1. Click . The **All document types** window opens. 2. Select the applicable document types for this practice area such as Affidavit, Briefs, Contracts, Pleadings. 3. To enable all types, select **Document type name**. 4. Click **Select**.

4. To continue adding practice areas, click , and select **Save and create another**.
5. When you have entered the last practice area, click **Create**.

The new practice area is now available for use.

To view practice areas:

1. Go to the **Legal Admin** dashboard.
2. In the **Practice Areas** tile, move through the tile to view the list.

Deleting practice areas

You cannot delete a practice area associated with a matter.

To delete a practice area:

1. From the **Legal Admin** dashboard, in the **Practice Areas** tile, select the check box beside the targeted practice area. **Delete** becomes available.
2. Click **Delete**.
   The practice area is deleted.
3. If you receive the message "The requested operation is not allowed," check to see if you are using the practice area within a matter. You cannot delete a practice area that is in use. See Determining where using practice areas.

Determining practice areas in use

To determine where you are using a practice area:

1. On the **Legal Home** dashboard, click the **Matters** tile title.
   A list of matters is displayed.
2. In the **Practice area name** column, look for the practice area in question.
   If you find the practice area is in the list, it cannot be deleted.

Managing document types

Document types specify the types of documents that you use in your organization. Document types are typically associated with a practice area. However, you can have document types that are not associated with a practice area. You can also associate the same document type with multiple practice areas.

Document types are listed in the Legal Admin dashboard in the Document Types tile. You can view, filter, add, open, and delete from these tiles.

Viewing document types and associated practice areas

You need the Legal Manager, Legal Admin, or Legal Tenant Admin role to view practice areas and document types on the Legal Admin dashboard.

To view document types:

1. Navigate to the **Legal Admin** dashboard.
2. View the lists presented in the **Document Types** tile.

To view document types and the associated practice areas:

1. From the **Legal Admin** dashboard, in the **Document Types** tile, click a document type
   The Document Type is displayed.
2. In **Select practice area**, you can see the practice areas associated with the document type.

To disassociate a practice area from a document type:

1. From the **Legal Admin** dashboard, in the **Document Types** tile, click a document type.
   The Document Type is displayed.
2. In **Select practice area**, select the check box beside the targeted practice area.
   The Clear option becomes available.
3. Click **Clear**.
4. To disassociate all practice areas from the document type, select the check box beside **Practice area name**, and click **Clear**.

Note: You cannot disassociate a document type that is in use.

Associating more document types

To associate more document types with a practice area:

1. From the open practice area, in **Document types**, click (Browse).
   The **All Document Types** form opens.
2. In the list, click an entry. You can select multiple entries.
3. Click **Select**.

The selected document type is displayed in the **Document types** list.

Adding document types

You need Legal Manager, Legal Admin, or Legal Tenant Admin to add document types.

Note: For the Outlook add-in, you must add the document type **Email**.

To add a document type:

1. From any page, in the header area, click + (Create a new item).
   The **Recent items** and **All items** lists are displayed.
2. Select **Document types**. Alternatively, from the **Legal Admin** dashboard, in the **Document Types** tile, click + (Create a new item).
   The **Create document types** form opens.
3. Complete the fields. Fields with a red asterisk are required.

Document type name	*Required*. Provide a name, such as Affidavit, Briefs, Contracts, Copyright, Depositions, Email, Letter of Intent, Pleadings, or Subpoenas.
Description	*Optional*. Describe the document type.
Select Practice Area	*Optional*. You can associate a document type with a practice area while adding the document type. **To associate a document type with a practice area:** 1. Click .

	The **Practice areas** window opens. 2. Select the applicable practice area for this document type. 3. To enable all practice areas, select **Practice area name**. 4. Click **Select**. The selected document types are displayed in the Create Document Types form.

4. Click **Create**.

The new document type is now available for use.

To view document types:

1. Select the **Legal Admin** dashboard.
2. In the **Document Types** tile, move through the tile until to view the list.

Deleting document types

You cannot delete document types that are associated with matters.

To delete a document type:

1. From the **Legal Admin** dashboard, in the **Document Types** tile, select the check box beside the targeted document type.
   Delete becomes available.
2. Click **Delete**.
   The document type is deleted.
3. If you receive the message "The requested operation is not allowed," check to see if you are using the document type within a practice area. You cannot delete a document type that is in use.

To determine where you are using a document type with a practice area:

1. On the **Legal Admin** dashboard, in the **Document Type** tile, select the targeted document type.
   The Document Type form is displayed.
2. In **Select practice area**, look for check boxes that are selected for any practice area. Document types with no associated practice area can be deleted. Document types with an associated practice area (that have the check box selected) cannot be deleted.

Using the Client Matter Onboarding dashboard

Managers (users with Legal Manager, Legal Admin, or Legal Tenant Admin roles) use the Client Matter Onboarding dashboard to initiate workflows and to monitor the status of requests and tasks.

From the Client Matter Onboarding dashboard, managers can monitor:

- All ongoing requests from the Requests tile
- All ongoing onboarding tasks from the Tasks tile

The Client Matter Onboarding dashboard presents a view of activity to understand

- What has completed
- What has been rejected
- What is due soon
- What is overdue

To access the Client Matter Onboarding dashboard:

1. From any page, in the header, click .
   The list of dashboards appears.
2. Click **Client Matter Onboarding**.

Users with the Legal User role do not have access to multiple dashboards.

Who can access the Client Matter Onboarding dashboard?

Users with the following roles can access the Client Matter Onboarding dashboard:

- Legal Manager
- Legal Admin
- Legal Tenant Admin

Tile: Requests

The Requests tile presents the status of onboarding requests:

- **Open requests** are in progress.
- **Completed requests** are those that have been approved and whose client matters have entered the workspace.
- **Rejected requests** are also completed requests in the sense that no more work is being done.

A new client-matter onboarding request is added to the requests list on the Client Matter Onboarding dashboard, under **Open requests**. The **Open requests** tab shows the status within the respective workflow. For example, a new request Stage shows as New Request.

To view requests:

1. From the **Client Matter Onboarding** dashboard, in the **Open Requests** tab, select a request.
   The request opens showing Properties and Tasks. The workflow is displayed graphically across the top.
2. From here, you can:
   - Update properties
   - Open tasks
   - Claim tasks
   - Start tasks
   - View history

See Initiating the client-matter workflow for details on when and how to perform these actions.

Client matter onboarding request flow

The client matter onboarding request workflow comprises requests and tasks. Requests have stages with specific tasks within a stage. Both requests and tasks have history. The following table lists the onboarding workflow for the request stage and the tasks at each stage.

Requests have an initiator (the user who created the onboarding request) and a requestor (specified in the *Requested by* field in the task). When a request is created, it is not assigned to a user. However, the individual tasks that occur at each stage of the request are claimed by users. Requests have several stages. Each stage has one or more tasks unless it is at the end of the workflow.

Tasks have several *states* or *statuses*. Both terms are used in the application. All tasks must be completed at a stage for the request to move to the next stage. If a stage has multiple tasks, all must be performed, and they can be performed in any order. The exception is if a request is rejected. Any uncompleted tasks are marked Obsolete, and the request moves immediately to the Closed stage.

Request stage	Tasks at that stage
New request	▪ Administer request
Request check	▪ Perform conflicts check ▪ Perform credit check ▪ Perform other generic tasks

Request stage	Tasks at that stage
Review	▪ Review request
Completed ▪ If approved at Review request task	none
Closed ▪ If rejected at any task	none

Performing request actions

From the Requests tile list, you can perform actions from each tab: Open requests, Completed requests, and Rejected requests.

To perform an action:

1. From **Client Matter Onboarding**, in the Requests tile, from any tab, select the check box beside an entry.
   The available actions are displayed across the top: Open, Delete, History.
2. Click an action:
   - **Open** - To open the request.
   - **Delete** - To delete the request.
   - **History** - To view and print history of the request.

See Initiating the client-matter workflow for details about each action.

Tile: Tasks

The Tasks tile provides the following tabs:

- **Open tasks** are tasks that have not been claimed.
- **All tasks** is a list of all tasks.
- **Due soon** lists tasks with a due date within 30 days.
- **Overdue** list tasks that are past their due date. Overdue tasks show the due date in red.
- **Completed** lists complete tasks.

See Initiating the client-matter workflow for more details about tasks.

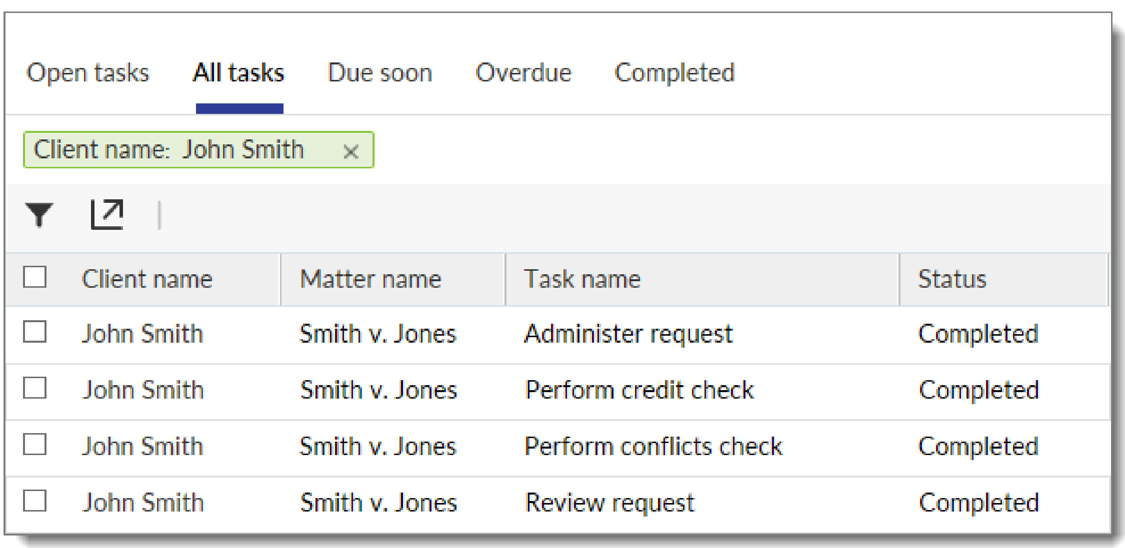
Task states

The following table describes the task states in the task tile in the Client Matter Onboarding dashboard.

State	Description
Created	The task is assigned to your role and has not been claimed by an individual.
Assigned	The task has been claimed and is assigned to you.
In Progress	The task has been started.
Completed	The task has finished.
Obsolete	Obsolete tasks are those which: ▪ Have been skipped. ▪ Had a status of Created, Assigned, or Started when its associated request was rejected. The obsolete task is created when an onboarding request is rejected and is marked as Rejected. No action is required. All tasks in the request whose status was not Completed, change to Obsolete. You can also make a practice area activity flow task obsolete when you select Skip. The task becomes Obsolete, and the matter activity advances to the next task or stage. See the *Skip* action in Working from the tile title: My assigned tasks and My role tasks.

Monitoring tasks for an onboarding request

The following example shows the tasks and status for an onboarding request. In this example, all tasks have been completed.



To monitor tasks and status:

- From the **Client Matter Onboarding** dashboard, in the **Tasks** tile, click **All tasks**.

All tasks are displayed showing (depending on the settings for Show / Hide columns) Client name, Matter name, Task name, Status, Assignee, Due date, and Created date. In the provided example, some columns were excluded. Note that each task in the onboarding process for *Smith v. Jones* has been completed.

You can also select the **Completed** tab if you only want to see what has been completed, **Due soon** for what is coming due, or **Overdue** for what has passed its due date.

Performing task-related actions

From the Tasks tile list, you can perform actions from each tab: Open tasks, All tasks, Due soon, Overdue, and Completed.

To perform an action:

1. From **Client Matter Onboarding**, in the Tasks tiles, from any tab, select the check box beside an entry.
   The available actions are displayed across the top: Open, Delete, History.
2. Click an action:
   - **Open** - To open the task.
   - **Claim** - To claim an unclaimed task.
   - **Start** - To start a claimed task.
   - **History** - To view and print history of the task.

See Initiating the client-matter workspace for details about each action.

Tiles: Reports

OpenText Legal provides graphical reports from the Client Matter Onboarding dashboard.

- **Open Onboarding Requests by Stage**: Presents the number of requests and the stage of the request in a pie chart format. Completed or rejected requests are not shown.
- **Open Onboarding Tasks**: Presents the open onboarding tasks by the task name (Administer request, Perform conflicts check, Perform credit check, Review request) and quantity in a bar chart format. Completed or obsolete tasks are not shown.

Chapter 5

Initiating a client-matter workflow

The onboarding process initiates a workflow to approve or reject a new matter, with a new or existing client. The process ensures that conflict and credit checks are recorded in the application to advance the workflow to the next stage. A client-matter request can be rejected at any stage in the process.

Who can do this?

The following roles can perform client-matter onboarding tasks:

- Legal User: The Legal User role can initiate a client matter request. However, the Legal User role cannot perform the remaining workflow tasks.
- Legal Manager
- Legal Admin
- Legal Tenant Admin

Roles determine your onboarding participation

When a client-matter onboarding request is submitted, entries appear in My Assignments (tasks) and My Requests (onboarding requests) on the Legal Home dashboard. The objective is to **claim** the onboarding tasks, **start** the tasks, and **add** additional tasks that may be required (conflicts and credit checks, and generic tasks).

Depending on your role, you may only initiate a request and not work on the onboarding tasks. Some of the steps outlined in this section may not apply to your role. However, the steps do apply to users with Legal Manager, Legal Admin, and Legal Tenant Admin roles.

If your role is Legal User

The following procedures provide step-by-step instructions for onboarding a new client matter. Not all steps apply to users with the Legal User role. You can initiate an onboarding workflow, but you cannot perform the tasks to complete the onboarding workflow.

If your role is Legal Manager, Legal Admin, or Legal Tenant Admin

The following procedures provide step-by-step instructions for onboarding a new client matter. Most of the steps, if not all, apply to users with the Legal Manager, Legal Admin, or Legal Tenant Admin role. The procedure guides you through the client-matter onboarding process. The steps explain what is displayed in the various tiles and what the entries mean to you, other users with the same role as you, and your team. For detailed information about the items you see in My Assignments and My Requests, see Using the Legal Home dashboard.

Step 1: Initiate a client-matter request

New client-matter onboarding requests are initiated from **Create a new item**.

To initiate a new client-matter onboarding request:

1. From any page, in the header area, click + (Create a new item).
   A menu is displayed with **Recent items** and **All items**.
2. Select **Client matter**.
   The **Create Client matter** form opens.
3. Complete the fields. Fields with a red asterisk are required. Ensure that you scroll down to complete the sections for Client and Matter detail.

Requested by	*Requested by* is the person initiating the workflow. A legal secretary or paralegal would typically select the user name of the lawyer or senior partner who asked them to initiate the onboarding request. 1. Click browse. The **All users** window opens. 2. Scroll and select a user name. 3. Click **Select**. The user name is displayed in **Requested by**.
Due date	*Due date* is when the approval needs to be completed.
Existing client detail	Complete this part of the form for an existing client. You can switch from existing client to new client. If the client does not already exist, click **Add new** to access the New client detail area of the form. **If the client already exists:** 1. For **Client name**, click browse. The **Clients** window opens. 2. Scroll and select the client.

	3. Click **Select**. The client name is displayed.
New client detail	This part of the form becomes available after you click **Add new**. **If the client does not already exist:** 1. Click **Add new**. The **New client detail** fields become available. 2. Complete the fields for Client name, Description (optional), and, Contact. 3. Complete Contact fields: First name, Last name, Job title (optional), Email, Phone, Address, City, Country, State/Province, Postal code/Zip.
Matter detail	Provide details about the matter.
Matter name	Enter the matter name. This name will appear as an entry in the Matters tile if the matter is approved.
Description	Describe the matter. Optional.
Practice area	Select a practice area. If there are no items in the list, you must first add a Practice Area. See Adding Practice Areas.

4. Click **Create**. Alternatively, on **Create**, click and select **Create and open** or **Save and create another**.

The client-matter onboarding request is submitted.

What happens next

After the client-matter onboarding request is submitted, new entries appear in My Assignments and My Requests on Legal Home.

From Legal Home

- My Assignments lists the client-matter onboarding tasks that are waiting to be claimed.
- My Requests lists the matter name (*Smith v. Jones*) with the stage **New Request**.

From Client Matter Onboarding

- The Requests and Tasks tiles list the new tasks and request.

Users with elevated roles (such as Legal Manager) may prefer to administer and monitor requests and tasks from the Client Matter Onboarding dashboard.

For users with the role of Legal Admin or Legal Manager:

- Proceed to the next step, Step 2: Claim the request.

For users with the role of Legal User:

1. Your task is completed.
2. Return to Legal Home to view the new entry in My Requests.
3. Wait for new entries in My Assignments when the new matter workspace is created.

Step 2: Claim the request

Now that the client-matter onboarding request has been submitted, someone must **Claim** the request's tasks and then **Start** the work.

Who can do this?

If you have the Legal Admin or Legal Manager role, you can claim the request's tasks.

Where is the request?

The request and the request tasks appear in a few places:

- Requests that you initiated or that were initiated on your behalf are displayed in *My Requests* (Legal Home dashboard).
- Onboarding request tasks that are waiting to be claimed or are assigned to you are displayed in *My Assignments* (Legal Home dashboard).
- Onboarding request tasks are also listed on the Client Matter Onboarding dashboard.

Tip: It is recommended to work from the Client Matter Onboarding dashboard because this dashboard identifies the client, matter, and associated task. When working from Legal Home, it is not immediately obvious how the tasks are associated with a client and matter.

Working from Client Matter Onboarding

To claim a task, work from the Tasks tile on the Client Matter Onboarding dashboard. This approach saves navigation time by working from the Properties and Tasks pane of the request. The following procedure documents the steps from Client Matter Onboarding.

To claim the onboarding request:

1. From **Client Matter Onboarding**, in the Tasks tile, click the **Open tasks** tab.
2. Open the entry for the new client matter, with the task **Administer request**. For example, click the entry with the targeted client name, matter name, and the task name **Administer request**.
   Alternatively, you can also open the My Assignments tile (from Legal Home) and click the **My role tasks** tab. Search and open the entry.
3. Select the entry.
   A new page appears with options to claim the request, view History, or add tasks. The status is **Created** and **Assigned to** is blank because no one has claimed this task.

4. Click **Claim**.
   The status changes to **Assigned** and **Assigned to** changes to your name.
5. Click **Start**.
   The Status changes to **InProgress**.
6. To see changes, you can view the entry from **Legal Home** and view the entry in **My Assignments**.
   The request that you just claimed now shows that it is assigned to you and is in progress .
7. Proceed to the next step, Step 3: Add follow up tasks.

Step 3: Add follow up tasks and generic tasks

Now that you have claimed and started the task, you are ready to add follow up tasks for conflicts of interest and credit checks (if a new client). These are standard tasks for onboarding new client matters. At this stage (New request), you can also add generic tasks.

Who can do this?

If you have the Legal Manager or Legal Admin role, you can add follow up tasks. Users with this role can assign the tasks to the appropriate individual or role.

Adding generic tasks and follow up tasks

You can add two types of tasks: generic and follow up. Conflict and credit checks are follow up tasks.

- Add conflict and credit checks using **Add follow up task**.
- Add generic tasks using **Add tasks**.

Generic tasks

From the task view, you can add generic tasks for any task that may be required such as adding more client information. Generic tasks that are assigned to you are displayed in My Assignments. You can add generic tasks **only** while the request is in the **New request** stage and **before** you add follow up tasks.

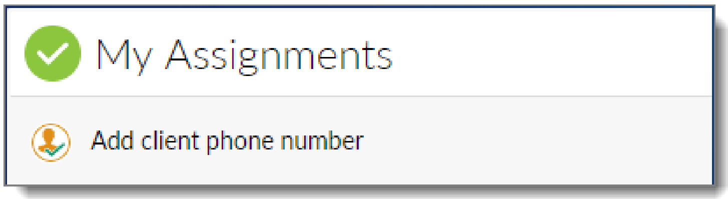
To add a generic task:

1. From the open task, click **Add tasks**.
   The **Add tasks** form opens.
2. For **Available tasks**, select **Generic task**.
3. In **Name**, describe the task.
4. Select the **Assignment type**.
5. Select **Assigned to** and **Assignee**.

6. Select **Due on**.
7. Click **Add**.

The new task appears in My Assignments for the user or role to which you assigned the task.

Example



Follow up tasks

You must add at least **one** follow up task (Perform credit check or Perform conflicts check) to advance the onboarding request. To add both tasks, select the tasks and assign them **before** you exit the form.

Note: After you click **Add follow up task**, you can no longer add generic tasks (using **Add tasks**).

To add follow up tasks:

1. From **Client Matter Onboarding**, in the **Tasks** tile, from the **Open tasks** tab, open the task **Administer request** for the targeted client and matter. If you did not leave the page from the previous step, then you are already in the correct location.
2. From the open task, **Administer request**, click **Add follow up task**.
   The **Add follow up tasks** form opens. Under **Available tasks**, you see **Perform conflicts check** and **Perform credit check**.
3. To add the task for conflicts check, select **Perform conflicts check**.
4. In **Assignment type**, select the appropriate type.

Assign to me (Individual)	Fills the **Assigned to** field with your user name.
Individual	Individual users become available in **Assigned to**.
Role	Roles become available in **Assigned to**. ▪ Select Legal Manager or higher.

5. In **Assigned to**, select the appropriate user or role. The selection in **Assignment type** determines the list.
   - If you select Legal Manager or Legal Admin, an Assignee list opens showing all users in that role.

- If you select a user from the Assignee list, it will assign the follow up task to that user.
- If you do not select a user from the Assignee list, it will assign the follow up task to the role for someone to claim.

6. To specify the task duration or due date, in the **Due on** area:

Duration	Select **Duration** and specify values for **Days**, **Hrs**, or **Mins** as appropriate.
Date	Use the date picker to specify date and time.
Set default values	To reset the **Due on** values, click **Set default values**. This action resets everything, including assignments.

7. To add the task for credit check, select **Perform credit check**.
8. Repeat Steps 4 through Step 6. Add and assign **all** tasks before you exit the form.
9. Click **OK**.
   The follow-up tasks are now assigned.

What happens next

The newly added follow up tasks can be viewed in Legal Home and Client Matter Onboarding.

To view the newly added tasks:

1. To view the newly added tasks, do one of the following:
   - Go to **Legal Home** to view the new tasks in My Assignments.
   - Remain in the Client Matter Onboarding dashboard. Click **Home** in the breadcrumbs to return to the dashboard view. In the **Tasks** tile, in **Open tasks**, locate the new task (or tasks) that you just added for the selected matter: Perform conflicts check and Perform credit check. If you only selected one follow up task, then you will only see that task.

My Assignments

In My Assignments, you should see two new tasks for onboarding the new client matter: Perform conflicts check and Perform credit check. The new tasks are displayed in My Assignments for the individual or role to claim.

My Requests

In My Requests, you see the matter with the new state **Request check**.

Client Matter Onboarding

The new tasks are displayed in the **Tasks** tile in the **Open tasks** and **All tasks** tabs: Perform conflicts check and Perform credit check. Additionally, in the **Request** tile, the matter stage reflects **Request check**.

2. Proceed to Step 4: Perform conflicts check.

Step 4: Perform conflicts check

At this point in the workflow, you have added follow up tasks for conflicts and credit checks. The tasks that must be performed depends on which follow on tasks were added in the previous step; you may perform Step 4 or Step 5, or both. In most cases, you will always perform Step 4.

The actual work for performing the checks is performed outside the OpenText Legal application. However, you can document the activity and add relevant notes to the application. In the *Perform conflicts check* step, someone must claim the task, start the task, and when the work is done, complete the task.

Note: You can reject a client matter request if the conflicts check indicates a problem.

Who can do this?

Users with the Legal Manager, Legal Admin, or Legal Tenant Admin role can perform conflict checking.

To advance this task

You must complete this task to advance the onboarding request to the next stage of **Review**. The task form has three sections: Task information, Associated onboarding request, and Task instructions.

This work can be performed from My Assignments or Client Matter Onboarding. The following procedure uses the Client Matter Onboarding dashboard.

To start and document the conflicts check:

1. From **Client Matter Onboarding**, in the **Tasks** tile, in **Open tasks**, locate the matter with the task **Perform conflicts check**.
2. Select the check box beside the entry.
   Available actions are displayed across the top.
3. Click **Claim**.
   The status changes to **Assigned** and **Assignee** shows your name.
4. Click **Start**.
   The status changes to **InProgress**.
5. When the work is complete, click **Open**.
   The task is displayed showing task information and onboarding status.
6. In **Was the conflicts check performed?**, select **Yes**.
   Now you are ready to add the client and matter ID if you have not previously done so. The credit team provides client and matter IDs. These values are not generated by OpenText Legal.

7. To add the client ID and matter ID, click **Open**.
   The client matter properties page is displayed showing the Properties and Tasks panes.
   a. In **Client ID**, provide the client ID. Client IDs are unique and cannot be reused.
   b. In **Matter ID**, provide the matter ID. Matter IDs are unique to the client.
8. To return to the Perform conflicts check detail form, in the Tasks pane, click the entry **Perform conflicts check**.

   Notice that the icon has changed to show the work has started. You are returned to the task page.
9. In **Please add any notes/suggestions**, provide relevant notes.
10. At this point in the process, if the conflicts check results are negative, you can reject the request. To reject the request, click **Reject**.
11. If the request is not being rejected, click **Complete task**.
    The status changes to **Completed**.
12. If you added *Perform credit check* in Step 3, proceed to the next step, Step 5: Perform credit check. Otherwise, proceed to Step 6: Review.

Step 5: Perform credit check

- If the task *Perform credit check* was added in the previous step, continue with this step, Step 5: Perform credit check.
- If the task *Perform credit check* was not added, proceed to Step 6: Review.

Now you are ready to perform the credit check (as a non-OpenText Legal process). At this point in the workflow, you have added follow up tasks for conflicts and credit checks. The actual work for performing the checks is performed outside the OpenText Legal application. However, you can document the activity and add relevant notes to the task. If the credit check results are negative, you can reject the request during this step.

Who can do this?

If you have the Legal Admin role, you can perform the credit check.

To advance this task

You must complete this task to advance the onboarding request to the next stage of Review. The task form has three sections: Task information, Associated onboarding request, and Task instructions.

The following procedure continues from the previous step, performing the work from Client Matter Onboarding.

To start and document the credit check:

1. Click **Home** in the breadcrumbs to return to the Client Matter Onboarding dashboard.
2. From the **Tasks** tile, in **Open tasks**, select the check box beside the targeted matter task name **Perform credit check**.
3. Click **Claim**.
   The status changes to **Assigned** and **Assignee** shows your name.
4. Click **Start**.
   The status changes to **InProgress**.
5. When the work is complete, click **Open**.
   The task opens showing task information and the onboarding status.
6. In **Was the credit check performed?**, select **Yes**.
   Now you are ready to add the Client and Matter ID if you have not previously done so.
7. To add the Client ID and Matter ID, click **Open**.
   The client matter page is displayed showing Properties and Tasks.
   a. In **Client ID**, type the client ID. Client IDs are unique and cannot be reused.
   b. In **Matter ID**, type the matter ID. Matter IDs are unique to the client.
8. To return to the Perform credit check detail, in the **Tasks** pane, click the entry **Perform credit check**. Notice that the icon has changed to show the work has started . You are returned to the task page.
9. In **Please add any notes/suggestions**, provide relevant notes.
10. At this point in the process, if the credit check results are negative, you can reject the request. To reject the request, click **Reject**.
11. If the request is not being rejected, click **Complete task**.
    The status changes to **Completed**.
12. Proceed to the next step, Step 6: Review.

Step 6: Review

Now is a good time to review the status of entries in Client Matter Onboarding and My Assignments. **Review request** is the next task in the workflow.

The following procedure resumes the process from the previous step, in the Client Matter Onboarding dashboard.

To review from Client Matter Onboarding:

1. Click **Home** in the breadcrumbs.
   The view changes to the Client Matter Onboarding dashboard.
2. In **Tasks** > **Open tasks**, the client matter is at the **Review request** stage.

To review from Legal Home:

1. Return to the **Legal Home** dashboard.
2. In **My Requests**, you see the matter name with the state **Review**.
3. In **My Assignments**, you see the task **Review request**.
4. Open the task to review applicable notes in **Task Comments**.
5. Proceed to Step 7: Final approval.

Step 7: Final approval

The onboarding process is now at the final review stage. In this part of the workflow, you must review the metadata and add the Client ID and Matter ID if you have not already done so. Additionally, you must **Claim** the request and then **Start** the request before you can **Approve**.

To perform the final review, you can work with the **Review request** entry in the My Assignments tile or you can work from the Client Matter Onboarding dashboard.

Who can do this?

If you have the Legal Admin or Legal Manager role, you can approve the onboarding request.

To perform the final review and approve the request:

1. Go to **Client Matter Onboarding**.
2. From **Tasks** > **Open tasks**, select the check box beside the matter with task **Review request**.
3. Click **Claim**.
   The status changes to **Assigned** and the **Assignee** changes to your name.
4. Click **Start**.
   The status changes to **InProgress**.
5. Click **Open**.
   The task is displayed showing Review request with status as InProgress. You should see that the conflicts and credit checks are done.
6. Perform the necessary review of the client-matter onboarding request such as updating metadata values. At this point, provide the Client ID and Matter ID if you have not already done so. The IDs can be entered in the current page:
   a. In **Client ID**, type the client ID. Client IDs are unique and cannot be reused.
   b. In **Matter ID**, type the matter ID. Matter IDs are unique to the client.
   c. To update additional metadata, click **Open**.
      The Properties page appears. Update the appropriate data.
   d. From the Properties page, to return to the **Review request** page, in the **Tasks** pane, click **Review request**.

7. Provide notes in **Please add any notes/suggestions**.
8. Do one of the following:
   - To reject the onboarding request, click **Reject**.
     - Add notes regarding why the request was rejected and click **OK**.
     - The status changes to **Rejected**.
     - **Reject** closes the task and does not push the client matter into the system. Additionally, when an onboarding request is rejected, an email is sent to the requester.
   - To approve the onboarding request, click **Approve**.
     - The status changes to **Completed**.
     - **Approve** closes the task and pushes the new client matter into the system.
     - An email notification is sent to the onboarding initiator and requester, informing them that the client matter was approved.

To view the updated workflow stages:

1. Go to the **Client Matter Onboarding** dashboard.
2. In the **Requests** tile, click the **Completed requests** tab.
3. Select the client-matter onboarding request that you just approved.
   The workflow is displayed, showing that the onboarding process is complete.

If you rejected the onboarding request:

- The workflow stage is **Closed**.
- The task list shows that the **Review request** task is **Obsolete**.
- Any outstanding uncompleted tasks are changed to **Obsolete**.

Step 8: View client and new matter workspace

After the client-matter onboarding request is approved, the new client matter is pushed out to the clients and matters tiles. If the client is new, you see the client's name in the Clients tile. The new matter is displayed in the Matters tile.

To view the client:

- From **Legal Home**, in the **Clients** tile, you should see the client as an entry in the Clients list.

To view the new client matter workspace:

- From **Legal Home**, in the **Matters** tile, you should see the new matter as an entry in the Matters list.

Results

- My Assignments now shows the next step in the workflow for the matter's corresponding practice area.
- My Requests will no longer display the onboarding request because it is complete.
- In the Matters tile, you can view
- **Client Matter Onboarding** > **Requests** > **Completed requests**, shows the completed request (need the Legal Manager role).

What is next?

Now that the client matter workspace is created, the first task in the practice area workflow is triggered.

To view the next task in the practice area workflow:

1. From **Legal Home**, click the **Matters** tile title.
   The Matters tile opens.
2. Click the newly added matter or select the check box and click **Open**.
   The matter opens in the Tasks tab with the first task for in the practice area workflow.
3. The next step is to populate the matter workspace with content and progress the matter through the practice area workflow.
4. Proceed to Working with the client-matter workspace.

Chapter 6

Working with the client-matter workspace

The client-matter workspace is where you manage files for each client matter. For example, for a matter *Smith v. Jones*, the matter is displayed as an entry in the Matters tile. When you select a matter (such as *Smith v. Jones*), the client-matter workspace is displayed where you can:

- View the workflow summary of the matter and the associated tasks
- View content in sub-folders such as *Matter documents* and *Emails*
- Download, audit, view history, delete, and rename
- Add files to the matter workspace
- Move files
- Edit documents
- Compare documents
- Share files
- Collaboratively edit documents using the **Open in Office Online** function. See Sharing and Collaborating.

Advancing the workflow

When the client matter workspace is created, the first task in the practice area workflow is triggered. This is your starting point for advancing the workflow. Additionally, the workflow summary shows the status of the workflow stage, and each stage comprises multiple tasks.

To advance the workflow, see Workflow summary and tasks.

Working from the Matters tile

Often it may be easier to view matters by working from the Matters tile versus the abbreviated list of matters on the Legal Home dashboard.

To view all matters:

1. From **Legal Home**, in **Matters**, click the tile title.
   The Matters tile opens listing all matters
2. Click a matter.

Navigating the matter workspace

After you select a matter from the Matters list, the matter opens in a new page. Navigate the matter using tabs: Contents, Properties, Emails, Workflow summary, and Tasks.

Tab	Description
Contents	Provides two folders: Matter documents and Emails. You can also add sub-folders to these parent folders.
Properties	Presents the matter properties. Properties include Matter name, Matter description, Matter ID, Client name, Client ID, Practice area name, and security indicator.
Emails	Lists emails in your Inbox and Sent folders. You can also compose and send an email from this tab.
Workflow summary	Shows the progress of the Workflow stages: Activity flow name, Status, % Complete, and Initiated on.
Tasks	Lists all the tasks for the matter: tasks assigned to you, others, and unclaimed tasks. For tasks assigned to others, you can see but not work on them. From here, you can claim, start, or complete tasks. You can also modify the due date for tasks and view task history. For more information about administering tasks, see Using the Legal Home dashboard.

Who can do this?

The Legal User role can work with the matter workspace. All users are assigned the Legal User role.

Legal User can:

- Modify matter metadata
- Send and view emails
- View workflow summary
- Claim and work on tasks
- Add documents to existing matters.

- Perform all document management operations such as open, download, versions, and share externally

Contents tab

The Contents tab lists all the matter files associated with the selected matter. From this tab, you can perform actions such as add document, add sub-folder, move, rename, and so forth. See Working with matter files for more details.

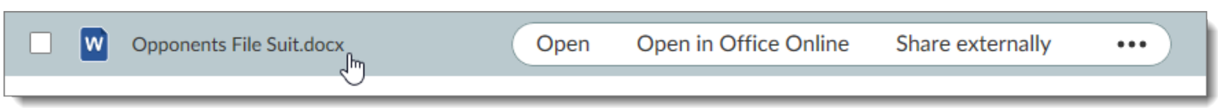
Working with matter files

The available options for matter files appear when you point to a file anywhere on the entry. For Microsoft Office document types (doc, docx, docm, xls, xlsx, xlsm, xltm, ppt, pptx, pptm) the option **Open in Office Online** is available.

To view available file actions:

1. From **Legal Home**, in **Matters** tile, click a matter.
   The matter opens.
2. Click the **Contents** tab.
3. Click a folder such as **Matter documents**.
   The list of files is displayed.
4. Point anywhere on a file.
   Available actions appear such as Open, Share externally, Delete, and so forth.

The following example shows how the options appear when pointing to a matter file.



5. Alternatively, you can select the check box beside the file name.
   The available actions appear across the top of the file list.
6. If you select multiple documents, a reduced set of operations is displayed.

To view more actions:

- Click ●●● (More). You may not see More, depending on the width of the left pane.

The following procedures describe the available actions in the Contents tab.

Actions	Procedures
Open	When you open a file, a new page appears showing the file's metadata along with a preview of the file in two panes. The complete list of actions (other than Open) is available in an action bar across the top of the preview pane.

Actions	**Procedures**
	You can open files using various approaches. The primary approach is to click a file and generally that action opens the file. However, depending on the interface location in which you select or click a file, that action may open the file or display the available file actions, such as Open. ▪ When you click a file from a list in a tile, that action generally opens the file. ▪ When you select the check box beside a file, the available file actions are shown.
Open in Office Online	You can edit files using Office 365 for the following Office file types: doc, docx, xls, xlsx, ppt, pptx, vsd, and vsdx. You can also co-author a document in real time using this function. See Editing documents. **Note:** To use this function, you must have an Office 365 license. **Note:** You may be directed to the OpenText Core sign-in screen when you initially select the **Open in Office Online** action. Exit from the Core sign-in screen and select the **Open in Office Online** action a second time. You will be directed to Office 365. **To open files in Office Online:** 1. Select the file and click **Open in Office Online**. The document opens in Office 365. 2. Apply your changes and wait for the message "Saved to OpenText Core."
Share externally	You can share a file by emailing a link to the file. The file is made available through OpenText Core. The user you share a file with must either already have an OpenText core account or would need to create an OpenText Core account to view the file. The users have read-only access to the file, which means they cannot collaborate in real-time on the document. However, the recipient can download the file and review or edit as necessary. The person with whom you share will receive an email from OpenText Core inviting them to create an account or sign in to Core to see the shared document. **To share a file:** 1. Point to the file or select the check box beside the entry. 2. Click **Share externally**. The **Share externally** form opens. 3. In **Authorized user**, provide an email address. 4. Click **Add**. You can add multiple emails. 5. When done, click **Share**.

Actions	Procedures
	The recipient receives an email titled "OpenText Core Sharing Notification," with the message "OpenText Legal has shared *file name* with you." The *file name* is a live link for viewing the file. 6. To view the file, the recipient must click the link. The OpenText Core sign-in screen is displayed. 7. The recipient must provide a user name and password and click **LOG IN**. OpenText Core opens with the list of available files. The shared files are marked as "Shared by" under the file name when viewed in Core. The shared file is displayed in the recipient's list of files. For additional information about how to use OpenText Core, see https://core.opentext.com/support/
Share externally with expiry	The person you share with will receive an email containing a public URL link that is valid until the expiration date. The user does not need to log in to Core. **To share externally with expiry:** 1. Select the check box beside the file. 2. Select **More**, and click **Share externally with expiry**. The **Share as public URL** form opens. 3. In **Expiry date**, select a date. 4. In **Email**, provide an email address and click **Add**. 5. In **Message**, provide a message for the recipient. 6. Click **Share**.
History	View and print file history.
Versions	When you upload a new version of the same document, the major version number increments (for example 1.0 to 2.0). When you modify a Microsoft document in Office 365, the minor version number increments (for example 1.0 to 1.1). You can track document versions as attorneys add, remove, and edit clauses. **To view versions:** 1. Select the file. 2. Select **More** and click **Versions**. The Versions form opens. 3. To view a version, select the check box beside the targeted entry. Additional actions become available: **Open in viewer** and **Download**.

Actions	Procedures
	4. To open the selected version, click **Open in viewer**. The file opens in Brava viewer. From here you can markup, search, and zoom. 5. To download the selected entry, click **Download**. The browser prompts you to Save, Save as, or Cancel. 6. When you have completed viewing versions, click **Close**. **To compare versions:** You can compare different versions of the same document from the Versions action. 1. Select the file. 2. Select **More** and click **Versions**. The Versions form opens. 3. To compare versions, select the check box beside the targeted versions (two entries). 4. Click **Compare**. This action opens OpenText Brava, showing the two versions in the Side-by-side view. Note the watermark on each version "Before" and "After." ▪ To view text, click **Text**. Text view highlights the differences. ▪ To view as a report, click **Report**. 5. To close, click **X** in the upper corner of the compare header.
Download	Download files from the matter workspace to your computer. If a file cannot be viewed in Brava, then download it and view it in the application registered with its file extension.
Upload	The upload process assumes you are adding a new version of the document.
Zip and download	You can zip files and download them to your computer. 1. Select one or more files. 2. Select **More** and click **Zip and download**. 3. Your browser decides what to do with the downloaded files. It may automatically save them to Downloads or prompt you for a destination.
Audit	View the date, action, and the user that access the file.
Delete	Delete files from the matter workspace.
Rename	You can rename files in the matter workspace.

<table>
<tr><th>Actions</th><th>Procedures</th></tr>
<tr><td>Open in Brava viewer</td><td>You can open files from within OpenText Legal and view them using OpenText Brava! The OpenText Brava! Client provides the capability to load a wide variety of document types and view them as HTML output. You can search files as long as they have embedded text (.pdf, .xlsx, .docx, and so on).

To open a file:
1. Select the file and click Open.
The view changes showing the metadata in the left pane and the document in the right pane. Alternatively, select More and click Open in Brava viewer. This approach opens the document in full screen.
2. Click Help to read more about how to use the features of OpenText Brava!

Note: MSG files cannot be viewed in Brava viewer.</td></tr>
<tr><td>Compare</td><td>OpenText Legal uses OpenText Brava! for comparing documents.

To compare documents:
1. Select the check box beside two documents (must be in the same matter folder).
2. From the upper corner of the file list pane, select More and click Compare.
Brava opens showing the selected documents in two panes, side-by-side.

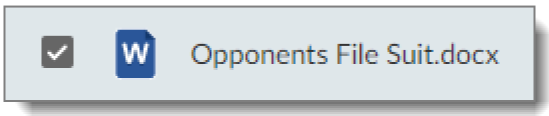
For more details on how to use the Brava functions, see Comparing documents.</td></tr>
<tr><td>Move</td><td>Move a file from its current folder to a different folder of the same matter. If you want to move a file to a sub-folder of Matter documents or Emails, then add a sub-folder first. See Adding sub-folders. You cannot move a document to a different matter.
1. Point to the targeted file and click More.
The list of actions is displayed.
2. Select Move.
The Move form opens.
3. In Move to, select a folder.
When you point to a sub-folder in the list, the file path is displayed in Move to. For example, a sub-folder under Emails might be named "From Smith." Therefore, the path would display as "Emails/From Smith."
4. Click Move.</td></tr>
</table>

Viewing content in the preview pane

When viewing content in the Preview pane, you can control the pane width, expand and collapse, zoom in and out, download, and print.

To view files and the file properties:

1. From the **Matters** tile, select a matter.
2. From **Contents**, select the **Matter documents** folder or a sub-folder.
   A list of files is presented.
3. Select the check box beside a file.



4. To view more of the file in the Preview pane, drag the edges of the Preview pane to the left.
5. Use the Preview pane icons to interact with the file. The following functions are available: Rotate clockwise, Print, Fit all, Fit width, Zoom in, and Zoom out.

Adding sub-folders

By default, the Matter documents and Emails folders have no sub-folders. However, if you want to organize files within this folder, you can add sub-folders.

To add sub-folders:

1. From the **Matters** tile, open a matter.
   The matter is displayed.
2. Click the **Contents** tab.
3. Select the **Matter documents** folder (or the **Emails** folder).
   The Matter documents folder is opened showing files (if there are any at this point). If there are no files in the folder, you see "Drag and drop files here to add new content."
4. Click + (Add) and select **Folder**.
   A box opens beside the folder icon.
5. Type a name for the folder and click **Add**.

The new folder is created, ready for adding documents.

Adding files to a matter

After the client-matter onboarding request and the associated tasks are complete, the next step is to start populating the matter with content. You can add files to the matter using Add or Drag.

Approach	How to
+ (Add)	Browse to a location to add documents from the Create New form.
Drag	Drag files to the matter pane from Windows Explorer. All documents inherit the metadata of the workspace.

To open a matter:

1. From **Legal Home**, in the **Matters** tile, select the matter.
2. Alternatively, click the **Matters** tile title to view a list of all matters. Select a matter.

The matter opens in the Contents tab showing the **Matter documents** and **Emails** folders.

The following procedures describe how to use each approach for adding files to the matter workspace. Each approach assumes you have opened the matter and are viewing the matter folders.

Adding files using + (Add)

To add files using Add:

1. From the **Contents** tab, click the **Matter documents** folder. If the file is to be added to a sub-folder, expand the sub-folder.
   Files that have been added to the folder are listed.
2. Click + (**Add**) and select **Document**.
   The **Create New** form opens.
3. Click **Upload**.
   The **Upload** form opens.
4. Click **Browse**.
   The **Open** dialog box opens.
5. Locate the file and click **Open**.
   In the **Upload** form, the selected file name is displayed. Title is auto-populated with the file name. You can change the file name by typing in Title.
6. In **Folder**, select a folder.
7. Click **OK**.
   The **Create New** form is displayed showing the file name, matter name, client name, and practice area name. **Author** and **Document type name** are required fields.
8. For **Author**, click (Browse).
   The **All users** form opens.
9. Select a user name and click **Select**.
   The selected user name is displayed.
10. For **Document type name**, click (Browse).
    The **Document Types by Practice Area** form opens.

11. Select a document type and click **Select**.
    The selected document type is displayed.
12. Click **Create**.

The file is added to the folder.

Adding files using drag

To add files using drag:

1. From Windows Explorer, locate the targeted file or files.
2. Select the file and drag it to the Matter documents folder or expanded sub-folder.

The file is added to the folder.

Note: When you drag files, the Author and Document type values are not set. You can set the values when you open the files.

When the file already exists in the repository

You cannot add the same file to the repository after it has been initially added. The message "The document '*filename*' exists in the repository" is displayed.

You can:

- Rename one of the files and upload again.
- Or to upload a new version, use the **Upload** action for that document.

Adding a new file version

When you want to upload a new version of a file, you can use the Upload action. To explain how and why you would use Upload, let's use a Word document as an example. The example file name is `Hearing Notice.docx`.

- First, you add the file to the matter workspace by dragging the file from Windows Explorer to the matter folder.
- Later you edit the document on your local drive and save as `Hearing Notice_Rev1.docx`.
- You can drag the new file to the matter workspace and have two versions: `Hearing Notice.docx` and `Hearing Notice_Rev1.docx`.
- Alternatively, you can use Upload to replace the original file with the newer version.
- Additionally, you do not have to "save as" with a new file name. You can update `Hearing Notice.docx` on your local drive and upload it to the matter folder to replace the original version.

To upload a new version:

1. In the matter folder, point to the file that you want to replace. For example, `Hearing Notice.docx`. Available actions appear.

2. Click ••• (More) and select **Upload**.
   The **Upload** form opens.
3. Click **Browse**.
   The **Open** dialog box opens.
4. Locate the new file version and click **Open**.
   You are returned to the **Upload** form.
5. Click **OK**.

The original file is replaced with the revised file. Next, you can view the file versions that you uploaded.

Viewing and downloading previous uploaded file versions

You can access older versions of uploaded files using Versions. From Versions, you can download and delete earlier versions.

To view versions of files:

1. From the matter folder, point to the targeted file.
   Available actions appear.
2. Click ••• (More) and select **Versions**.
   The **Versions** form opens.
3. Select the check box beside the targeted file.
   Additional actions become available: Open in viewer and Download.
4. Click **Open in viewer** or **Download**.

For more details about Versions, see Viewing file versions.

Editing a document in Office 365

After you have added a document to the matter workspace, you can edit the document using Office 365. You can use the Office 365 collaboration feature to edit the document with internal users interactively.

To edit a document:

1. In the matter workspace, select a matter.
   The matter properties are displayed.
2. Click the **Contents** tab.
   The Matter documents and Emails folders are displayed.
3. Open the targeted folder.
   Files in the folder are displayed.
4. Locate a Microsoft file type (Word, Excel, PowerPoint, Visio). When you pause on the entry, additional functions become available. Click **Open in Office Online**.
5. If you are not already signed in to Office 365, then you must provide your credentials on the first request. After you are signed in, the document opens in a new tab.

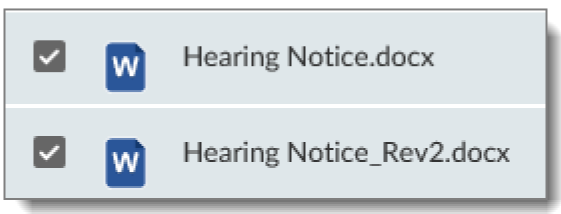
6. Apply your edits and wait for the message "Saved to OpenText Core."
   Saving saves the document in OpenText Legal.
7. Close the tab that Office 365 opened.
8. You are returned to OpenText Legal.

Comparing documents

OpenText Legal uses OpenText Brava! for comparing Word documents. It is helpful to compare versions of the same document, or your compare results may be difficult to evaluate. The Compare function shows a before and after image, with overlays of the differences.

To compare documents:

1. From the matter workspace, in **Contents** > **Matter documents** > *sub-folder* (if applicable), locate the documents to compare.
2. Select the check box for two documents.



   The Compare function becomes available.

3. Click **Compare**.
   A new window opens titled, **Compare with Brava**. The two documents are displayed in a split-screen view. In the left pane, you see Before, and in the right pane, you see After.
4. You can perform the following actions:

Overlay	Overlays the two documents. To detect differences, look for lines where words or sentences are co-mingled.
Show differences	Shows the differences in the two documents: Blue ink for the original, and pink ink for the revised document. To detect differences, look for lines where words or sentences are co-mingled.
Side by side	Shows the documents in two panes, side by side. Default view.
Left only	View left document in a single pane.
Right only	View right document in a single pane.
Balance	Changes the intensity of the ink.

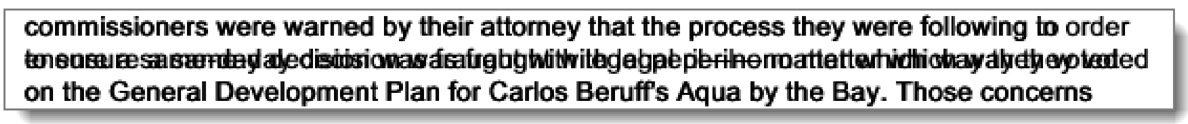
Search	Search for text (normal phrases and text patterns). ▪ Click **Options** to search Up, Down, Match case, Whole word, Regular expression, Term hit, and Show results dialog. The results are displayed in a new window. ▪ Select the results entry, to see where the text appears in the document.

Additional Brava controls

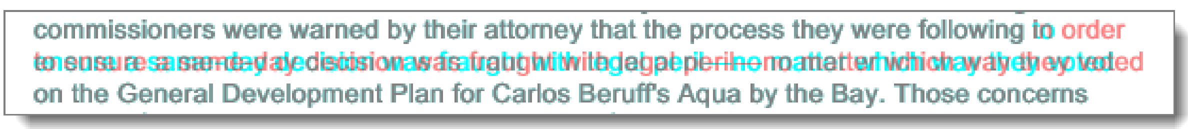
At the bottom of the Brava window, you can

- Navigate to a specific page number, select Previous page, Next page
- Rotate, Fit all, Fit width, Zoom, Pan, and Zoom a selected region
- Change the background to Black, White, Gray
- Change the background to Display monochrome, Correct color collisions
- Change the minimum line thickness

Example of Overlay



Example of Show differences



For more information about Brava viewer, see *Enterprise HTML Text Compare Client User Guide: OpenText Brava!* in My Support.

Properties tab

The Properties tab presents:

- **Matter name**: The Matter name was provided during the client-matter onboarding process. The matter name can be edited.
- **Matter description**: A description of the matter that was provided during the onboarding process.
- **Matter ID**: The Matter ID was provided during the client-matter onboarding process.
- **Client name**: The Client name was provided during the client-matter onboarding process.
- **Client ID**: The Client ID was provided during the client-matter onboarding process.

- **Practice area name**: The practice area was provided during the client-matter onboarding process.
- **Secured**: Secured provides the following options: Yes, No, and none.

Note: You cannot change Client name, Client ID, or Practice area name after the matter has been created.

Editing the matter name, description, ID

The matter name is initially provided during the client-matter onboarding process. While viewing a matter, in the Properties tab, you can change the matter name, matter description, matter ID, and the Secured indicator.

To edit the matter name:

1. From the **Matters** tile, select a matter.
   The matter is displayed.
2. Click the **Properties** tab.
3. Type your changes for **Matter name**, **Matter description**, **Matter ID**, or the **Secured** indicator. Matter IDs are unique to the client.
   The changes are auto-saved.

The changes are automatically saved and displayed in Matter name.

Emails tab

The Emails tab presents your Inbox and Sent messages. The Inbox is presented by default.

- The Inbox folder lists email replies that you sent from the matter workspace.
- The Sent folder lists emails that you sent from the matter workspace to include the actions *Share externally* and *Share externally with expiry*. If the recipient replies to these emails, the reply will automatically appear in the Inbox for the selected matter.

The Emails tab references emails sent from within the matter workspace and **not** from your Outlook email.

Sending emails from the matter workspace

You can send emails directly from the matter workspace and attach matter files. You can use + (Compose) or the Send Email action.

To send an email:

1. From the **Matters** tile, select a matter.
   The matter is displayed.
2. Click the **Emails** tab.

3. Click + (Compose). Alternatively, click the **Send email** action.
   The Email template window opens with a list of templates.
4. Select a template and click **OK**.
   The **New email** form opens.
5. Complete the fields.

To, Cc	Provide the email address of your recipient(s).
Subject	Provide an email subject.
Message	Type your message.

6. To attach a file, click (Attachments).
   The **Select Documents** window opens so that you can attach a document from this matter.
7. Locate the folder, select the file, and click **OK**.
   The file is attached to the email.
8. Click **Send**.

The email with any matter attachments is sent. The email you sent will appear in the Sent folder. If the recipient replies to the email you sent, the reply will appear in the Inbox folder.

To view Inbox and Sent messages:

1. From the **Matters** tile, select a matter.
   The matter is displayed.
2. Click the **Emails** tab.
3. To view **Sent** emails, click **Inbox** or , and then select **Sent**.
4. To view **Inbox**, click **Sent** or , and then select **Inbox**.

The icon acts as a toggle, enabling you to toggle between Inbox and Sent.

To view the email message:

1. Click the email.
   The email message opens. More actions are displayed at the bottom of the window.
2. To perform more actions, click an action: Reply, Reply All, Forward, or Close.

Accessing emails sent from the matter workspace

The email received by the recipient shows the sender name. The subject reflects what the sender entered in the **New email** form within the matter workspace.

Files sent as attachments from within the matter workspace are made available through OpenText Core. Users must access Core to view and download files.

To access attachments:

1. From the recipient's email client, the recipient must click the file link.
   The OpenText Core sign-in screen is displayed.
2. The recipient must provide a user name and password and click **LOG IN**.
   OpenText Core opens with the list of available files.

The recipient can open and download the file. For additional information about how to use OpenText Core, see https://core.opentext.com/support/

Workflow summary tab and Tasks tab

The Workflow summary tab shows all the stages for the matter activity flow, the percent complete, and when that stage was initiated.

When you click on any stage, you will see all the tasks and their statuses. Each stage has a state (New, Completed, and so forth), depending on which of its tasks are done or started.

To advance the workflow stage, you must complete the tasks listed for that stage.

How this works

Suppose you have a matter with a practice area of *Criminal Law* and an assigned Workflow *Criminal Law*. As an example, the workflow for Criminal Law has multiple stages: Introduction, Before First Meeting, First Meeting, Ongoing Communications, and The Trial. The first stage is *Introduction*, and the first task in the Introduction stage is *Record client details*.

The following procedures utilize the example of the Criminal Law workflow and the associated tasks to illustrate how you claim, start, and complete tasks to advance the workflow.

Advancing the workflow

The Tasks tab lists the current stage tasks and their status. For example, a first stage **Introduction** has a task **Record client details**.

To begin the Workflow:

1. From **Legal Home**, in the **Matters** tile, select a new matter.
   The matter is displayed.
2. Click the **Tasks** tab.

   The tasks are displayed, with the status as unclaimed . You can claim and start any task in any order.
3. Point to the task, and click **Claim**.

   The status changes to assigned (to you) .

4. Point to the task entry and click **Start**.

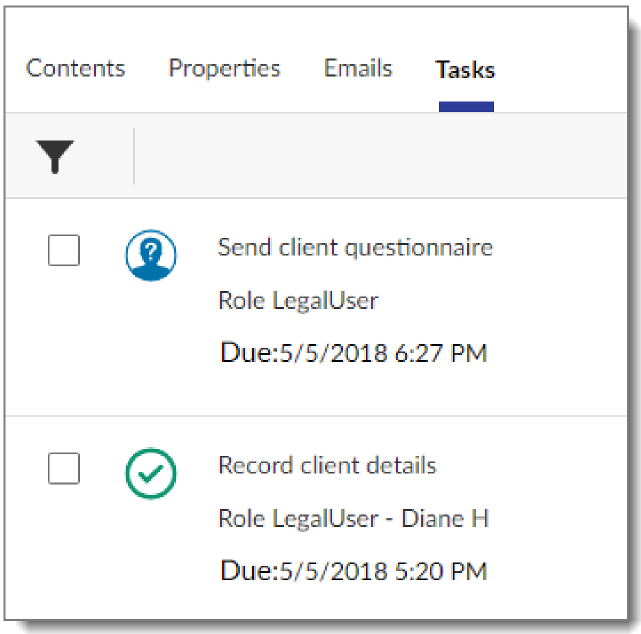
   The status changes to In Progress.

5. When you have completed the task, click **Complete**.

   The status changes to completed and the next task in the stage appears at the top of the Tasks list.

6. To add comments to the task that you just completed, click the task to open it. In **Task comments**, add relevant notes. The changes are auto-saved.

The following example shows the first task *Record client details* is completed. The next task in the stage *Send client questionnaire* is presented at the top of the Tasks list. The new task is unassigned, ready to be claimed by a user with your role.



7. To claim the new task *Send client questionnaire*, point to the task and click **Claim**.
   The status changes to Assigned (to you).

8. Point to the task entry and click **Start**.
   The status changes to Started.

9. When you have completed the task, click **Complete**.
   The status changes to Completed and a new task appears at the top of the list, *Set up Audio in room for notes*.

	Status	Name	Assignee	Due date
		Set up audio in room for notes	Role LegalUser	5/24/2018 5:59 PM
		Send client questionnaire	Role LegalUser...	5/24/2018 5:52 PM
		Record client details	Role LegalUser...	5/24/2018 5:40 PM

10. Repeat this process until all tasks in the stage are completed.

When you return to view the Workflow summary, the updated Workflow shows the percentage completed.

In the following example, in the *Activity flow name* column, the *Introduction* stage reflects a status of *Completed* with 100% in the *% Complete* column. The next stage, Before First Meeting is New, has not been started.

Activity flow name	Status	% Complete	Initiated on
Introduction	Completed	100%	5/3/2018 1:45 AM
BeforeFirstMeeting	New	0%	5/5/2018 12:14 AM

Chapter 7

Sharing and collaborating

OpenText Legal users can share files with external users, and save emails and email attachments from external users. Sharing files and is managed through OpenText Core as the file repository for OpenText Legal.

Who can do this?

The Legal User role can share files, send links, and send emails with file attachments.

OpenText Core: Sharing a file in the repository

OpenText Core is a simple yet secure way for users to share and synchronize files. Core is a safe space to upload and share files for employees, customers, partners, and suppliers.

OpenText Core runs in the OpenText Cloud as a public cloud service. OpenText Core and OpenText Legal are integrated for document sharing and versioning.

Sharing files in the repository employs OpenText Core as an external repository to the OpenText Legal application where you can share a file from OpenText Legal to a non-OpenText Legal user. The process of sharing a file externally sends a notification to the external user with a link to the shared file.

For more information about using OpenText Core, see Core Support FAQ.

Sharing files with external users

You can share a file with external users by emailing a link to the file from within the matter workspace. External users can view and download the file.

For details on how to share files, see Sharing files with external users.

Accessing a shared file

External users can access files that you share by following a link in an email notification that is generated when you share files.

To access a shared file:

1. In the email notification, click the file link.
   A sign in screen for OpenText Core appears. If you do not have a Core account, you are prompted to set up an account if this is the first time a document is being shared with you.
2. Provide your OpenText Core user name and password.
   When you are signed in, a list of files is displayed.
3. Locate the file and select the check box beside the file.
   Available actions appear across the top of the file list.
4. Click the appropriate action: Download, Copy, or Edit.
5. To open the file, click the file name.
   The file opens in the Core viewer.
6. In the viewer, click **More** to see more available actions.

Emailing files from the matter workspace

From the matter workspace, you can email matter files to external users. This is done from the Emails tab when you select a matter.

For details on how to send emails with matter files attached, see Emails tab.

Outlook: Saving emails and attachments to the matter workspace

With the OpenText Legal Outlook integration, you can save selected email communication from external users directly to the matter workspace. The Outlook integration provides a single location for all matter related content to include the email message and any relevant attachments.

Launching the OpenText Legal add-in

You can launch the OpenText Legal add-in from your desktop Outlook client or Office 365. If you do not have the Outlook Add-in installed, see How to install the OpenText Legal Outlook Add-in.

To launch from the Outlook desktop:

1. On your desktop, open Outlook.
2. If you do not have a Preview pane, open any message.
3. On the **Home** tab, click the OpenText Legal add-in .

To launch from Office 365 Outlook:

1. Open Office 365 Outlook.
2. Open any message.
3. In the preview pane, click the OpenText Legal add-in .

For both cases, the OpenText Legal add-in opens in a new pane. If you are not already signed in, you are prompted for your OpenText Core credentials. After entering your user name and password to sign in, the OpenText Legal add-in pane opens with a list of all matters that you can access.

Saving emails and attachments to the matter workspace

From an open email in your email client, you can save files to a matter workspace. You cannot save a file to the matter workspace from a new email or when replying to an email.

When saving an email message, it is saved as a new document (`.eml` file) to a matter workspace. You cannot save versions of an email message. You can save the email that includes the attachments, or you can save the attachments only.

Organizing attachments in the matter workspace

You can also control where you save the email and the attachments. This approach enables saving the files in different folders. For example, if you want to save messages and attachments, you can save all to the **Emails** folder or its sub-folders. Additionally, you could save the attachments only to the **Matter documents** folder or a sub-folder. This approach allows to you find documents in the **Matter documents** folder structure without the need to search the **Emails** folder.

You can save emails or just email attachments to the matter workspace, navigating through a series of folders to locate the matter in which you want to save the email and attachments.

- If the email does not have any attachments, the list of matters is displayed. From here you can select a matter and drill down to the sub-folders to save the email.
- If the email has one or more attachments, the add-in pane displays the options **Email** and **Attachments only**.
- From the matter workspace, attachments can be viewed in the preview pane or downloaded and opened with their registered application.

Saving an email

You can save emails from your email client to a matter workspace in OpenText Legal.

To save an email:

1. From your email client, select an email.

2. From the open email, click the OpenText Legal add-in .
   The OpenText Legal add-in pane opens to the right showing the options to save the **Email** or **Attachments only**.
3. If there are attachments, do one of the following:
   - To save the email and the attachments, click **Email**.
     A list of matters is displayed.
   - To save the attachments only, click **Attachments only**.
     A list of matters is displayed.
4. If there are no attachments, the list of matters is displayed.
5. From the list of matters, select an entry.
   When you select a matter, the folders are displayed.
6. Alternatively, you can use **Filter Matters** to select a Matter. Type a name or partial name to view the matching matters.
7. Select a folder or expand a parent folder to locate a sub-folder. The caret symbol indicates the folder has sub-folders.
8. Select the Document type for the email or each attachment.
9. Click **Save**.

The message "Uploading" is displayed while the email or attachment is being updated from Outlook. For larger uploads, the message might be displayed for some time, and users should wait for the upload to complete before moving to the next email or upload.

The file or files are saved to the selected matter folder. The OpenText Legal add-in pane lists the status of the saved email, the matter selected, and matter folder selected.

When saving an entire email, if the matter's practice area has an "Email" document type, then you are not prompted for a Document type, and the "Email" Document type is used. Your administrator can make this default Document type something other than "Email."

Viewing emails

To view the files in OpenText Legal:

1. From the targeted matter workspace, refresh the screen.
2. Navigate to the targeted folder.

The newly uploaded files should be displayed.

When the file already exists in the repository

You cannot add the same file to the repository after it has been initially added. The message "*filename* already exists in the selected folder. What would you like to do?" is displayed.

To add a new version:

- Click **Add new version**.

To create a new document:

- Click **Create new document**.

Office 365: Collaborative editing

Collaborative editing is done using the file action **Open in Office Online** from a matter document. You can edit files using Office 365 for the following Office file types: doc, docx, xls, xlsx, ppt, pptx, vsd, and vsdx.

If other users are working on a document simultaneously while you have the document open, you will see their presence and the changes they are making. Their user name appears as a flag where the edits are occurring in real time.

Edits applied by you and the other users are automatically saved and stored in OpenText Core. You can view the changes from the matter workspace in the preview pane or by using Office 365.

Requirements

You can edit documents using Office 365 applications with users that can access OpenText Legal and have an Office 365 license.

Note: You may be directed to the OpenText Core sign-in screen when you initially select the **Open in Office Online** action. Exit from the Core sign-in screen and select the **Open in Office Online** action a second time. You will be directed to Office 365.

To open files in Office 365:

1. From an open matter, select the check box beside a document.
   Available actions appear across the top of the list.
2. Click **Open in Office Online**.
3. For the first time, you must sign in to your Office 365 account.
4. The document opens in Office 365 (the corresponding application that matches the file extension opens). For example, for `.docx` files, Word opens.
5. Apply your changes and wait for the message "Saved to OpenText Core." Microsoft uses automatic saving. Ensure that you see the message "Saved to OpenText Core" before you exit the browser.

The changes made by you and the external user are saved as a new version in the matter workspace. The Minor Version number is incremented.

Chapter 8
Glossary

A

audit

When you audit a document, you can view the document name, document path, modified dates, action that occurred on the specified date, and the user that performed the action. This action comes from Core.

C

claim a task

Tasks that are waiting to be claimed have the "user with a question mark" icon. You must claim a task before you can start working on it.

claiming a task

Tasks that are waiting to be claimed have the "user with a question mark" icon. You must claim a task before you can start working on it.

client

A client is one who receives professional services from the law firm.

client-matter workspace

Where users can create, populate, search, share, and edit matter documents.

clients

A client is one who receives professional services from the law firm.

compare

Compare Word documents using OpenText Brava! You can view the before and after, show differences, view side-by-side, and search.

comparing

Compare Word documents using OpenText Brava! You can view the before and after, show differences, view side-by-side, and search.

contact

Contacts are individuals within a client organization that are associated with the client matter.

D

dashboard

Dashboards are the pages you can access: Legal Home, Legal Admin, and Client Matter Onboarding.

dashboards

Dashboards are the pages you can access: Legal Home, Legal Admin, and Client Matter Onboarding.

document type

Types of legal documents such as instruments, pleading, contract, deed, will, trust, or affidavit.

document types

Types of legal documents such as instruments, pleading, contract, deed, will, trust, or affidavit.

F

filter

Use the Filter feature to limit the display results.

filtering

Use the Filter feature to limit the display results.

H

home

A home page is your dashboard for performing work. You could have a single dashboard or multiple dashboards depending on your assigned role.

home page

A home page is your dashboard for performing work. You could have a single dashboard or multiple dashboards depending on your assigned role.

L

Legal Admin

Legal Admin is a role name and a dashboard name. Role: Legal Admin has all the permissions of Legal User and Legal Manager. Additionally, the Legal Admin role can delete lookup items: clients, practice areas, and document types. Dashboard: Legal Admin dashboard is where you can administer clients, matters, practice areas, and document types. You must have the Legal Admin role to access the Legal Admin dashboard.

Legal Manager

Legal Manager has all the permissions of Legal User in addition to elevated permissions to administer clients, matter, practice areas, and document types. Legal Manager can also complete tasks for client-matter onboarding.

Legal Tenant Admin

Legal Tenant Admin has all the permissions of Legal User, Legal Manager, andLegal Admin. The Legal Tenant Admin also performs the tasks for managing user groups such as customizing role permissions. The Legal Tenant Admin role may not be available in all subscriptions.

Legal User

Legal User is the base role assigned to all users. By default, all users can view, edit, and manage content. Additionally, Legal User can initiate a client-matter onboarding request through the sub-role Initiate Workflow.

lookup data

Lookup data comprises lists of clients, contacts, users, roles, and so on.

M

matter

A matter is a legal proceeding such as a dispute, a will, power of attorney, and so on.

matter activity workflow

The matter activity workflow shows all the stages for the matte, the percent complete, and when that stage was initiated.

matter workspace

Where users can create, populate, search, share, and edit matter documents that are specific to a client. A matter workspace is also a client-matter workspace.

matters

A matter is a legal proceeding such as a dispute, a will, power of attorney, and so on.

O

onboarding request

An onboarding request is a process to approve a new matter for a new or existing client.

onboarding requests

An onboarding request is a process to approve a new matter for a new or existing client.

OpenText Core

OpenText Core is a repository for sharing matter documents and an application for accessing shared files.

P

practice area

The specific areas of law that your organization supports. Practice areas can include criminal, family, personal injury, and estate law.

practice areas

The specific areas of law that your organization supports. Practice areas can include criminal, family, personal injury, and estate law.

R

role

Roles determine what you can see and do within OpenText Legal.

roles

Roles determine what you can see and do within OpenText Legal.

S

stage

A stage is a step in the onboarding workflow: New request, Request check, Review, Completed, and Closed. Stages have specific tasks.

start a task

You can start to work on a task after it has been claimed. Users with your same role can claim and start tasks. Claim and Start are actions in the interface.

state

Tasks have specific states: Created, Assigned, In Progress, Completed, Obsolete, and Suspended.

states

Tasks have specific states: Created, Assigned, In Progress, Completed, Obsolete, and Suspended.

status

Status refers to onboarding tasks: Created, Assigned, InProgress, Completed, Obsolete, and Suspended.

T

task

Tasks are specific work units to advance an onboarding request or practice area workflow.

tasks

Tasks are specific work units to advance an onboarding request or practice area workflow.

tile title

A tile title is in the header of a tile, such as Clients or Matters. When you click the tile title, you can view the entire list of tile entries. It may be easier to work from a page with only the expanded tile and its entries.

V

version

The document versions option shows the major version, minor version, changed by, and the date the file was modified. You can select a version and open or download the file.

versions

The document versions option shows the major version, minor version, changed by, and the date the file was modified. You can select a version and open or download the file.

Appendix A

User roles

OpenText Legal user roles control who can:

- Onboard clients and matters
- Manage content (documents)
- Manage lookup data

The functions are based on four roles listed in ascending order of permissions:

- Legal User
- Legal Manager
- Legal Admin
- Legal Tenant Admin

The ascending order refers to the inheritance of the preceding role. For example, the Legal Manager role also inherits the capabilities of the Legal User role.

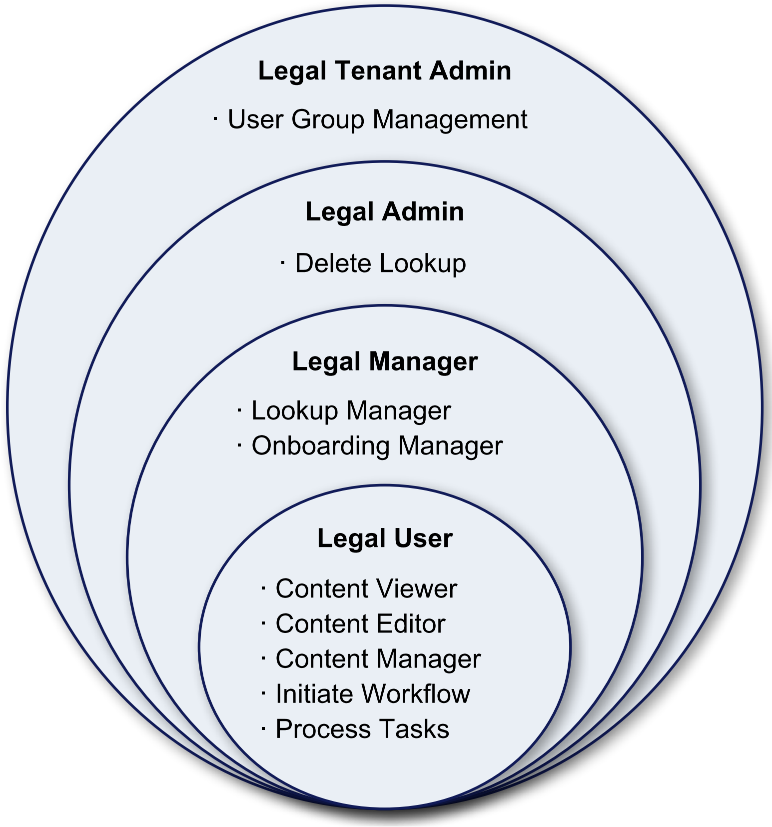
Legal User			
Legal Manager	+ Legal User		
Legal Admin	+ Legal Manager	+ Legal User	
Legal Tenant Admin	+ Legal Admin	+ Legal Manager	+Legal User

Each role is a grouping of sub-roles. See Sub-roles.

Hierarchy of access

The following diagram reflects a hierarchy of access. For example:

- All users are Legal User with sub-roles Legal Content Editor, Legal Content Manager, Legal Content Viewer, Initiate Workflow, and Process Tasks.
- Legal Manager is an elevated role that includes the Legal User role with two additional roles: Legal Lookup Manager and Legal Onboarding Manager.



Sub-roles

Sub-roles are the permissions to manage content, client, and matter data. Each role is a grouping of various sub-roles.

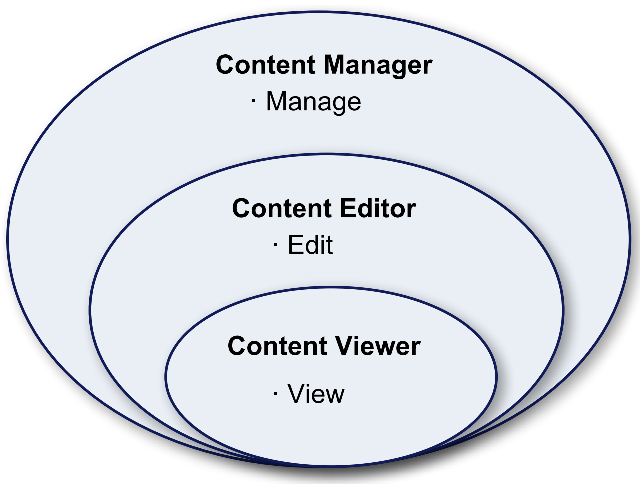
- Content management involves viewing, editing, and managing files.
- Client and matter management refers to onboarding clients and matters, managing clients and matters, and managing lookup data.

The following table describes the sub-roles that provide the permissions.

Management	Sub-roles
Content management	▪ Legal Content Viewer: View document properties, view lookup data, view folders, view documents, search for documents, view history, view versions, and view audit trail. ▪ Legal Content Editor: Edit document properties, upload a document, download a document, open a document in Brava viewer, open a document in Office 365, share externally, share externally with expiry copy, send email, and compare. This sub-role includes the Legal Content Viewer sub-role.

Management	Sub-roles
	▪ Legal Content Manager: Delete documents. This sub-role includes the Legal Content Editor and Legal Content Viewer sub-roles.
Client and matter management	▪ Initiate Workflow: Initiate a client onboarding request. By default, all users have this sub-role. ▪ Process Tasks: View and process tasks (claim, start, complete). ▪ Legal Onboarding Manager: Perform all tasks for client onboarding. ▪ Legal Lookup Manager: Create and manage all lookup data (clients, matters, practice area, and document type). ▪ Delete Lookup: Delete lookup data (clients, practice area, and document type). By default, Delete Lookup is assigned to the Legal Admin role only.

The Legal User role has the sub-roles Legal Content Viewer, Legal Content Editor, and Legal Content Manager. By default, all users are assigned the Legal User role. Therefore, all users can view content, edit content, and manage content.



Role relationships

The following table lists each role, the associated sub-roles, and the functions.

Role	Functions
Legal User	Legal User is the base role assigned to all users. ▪ All users can view, edit, and manage content because of the sub-roles Legal Content Editor, Legal Content Manager, and Legal Content Viewer. ▪ Legal User can initiate a client-matter onboarding request because of the sub-role Initiate Workflow.
Legal Manager	▪ Legal Manager has all the permissions of Legal User. ▪ Legal Manager has additional sub-roles: Legal Lookup Manager and Legal Onboarding Manager. • Legal Lookup Manager can create, edit, and disable clients, matters, practice areas, and document types. • Legal Onboarding Manager can complete the tasks for client matter onboarding.
Legal Admin	▪ Legal Admin has all the permissions of Legal User and Legal Manager. ▪ Legal Admin can delete lookup data because of the sub-role Delete Lookup. • Delete lookup can delete the following items: clients, practice areas, and document types. **Note:** Do not delete clients, practice areas, or document types that are already in use by matters or matter contents.
Legal Tenant Admin	▪ Legal Tenant Admin has all the permissions of Legal User, Legal Manager, and Legal Admin. ▪ Legal Tenant Admin also performs the tasks for managing various user group permissions and role assignments in OpenText Legal using OTDS.

Role assignment

Role assignment is performed outside of the OpenText Legal application. User and group assignment to roles can be performed in OpenText Directory Services (OTDS). See the product documentation in My Support for additional information about OTDS.

What determines your dashboards?

Your role assignment determines the dashboards that you can access. Users with the Legal User role will have only one dashboard. See Dashboards.

Users who are assigned the Legal Manager, Legal Admin, and Legal Tenant Admin roles have additional dashboards to perform onboarding and lookup management. See Dashboards.

Dashboards	**Role**			
	Legal User	**Legal Manager**	**Legal Admin**	**Legal Tenant Admin**
Legal Home	•	•	•	•
Legal Admin		•	•	•
Client Matter Onboarding		•	•	•

What can each role do?

Use the following table as a quick reference to understand the functions that are available for each role. The following table provides the role, the corresponding pages, and the functions that the role can perform.

Role	**Dashboard**	**Functions**
Legal User	▪ Legal Home	Onboarding ▪ Initiate a request for client-matter onboarding. ▪ View and process matter activity flow tasks (claim, start, complete). ▪ Access the My Requests list. ▪ Access the My Assignments list for tasks assigned to the user and tasks available to the user's role. ▪ Access Recently Edited Documents list. Client / Matter ▪ Access to clients and matters.

Role	Dashboard	Functions
		▪ Add documents to existing matters. Content management ▪ Perform all document management operations such as upload, open, edit, download, view versions, share externally, and so forth. Help topics ▪ View published help topics.
Legal Manager	▪ Legal Admin ▪ Client Matter Onboarding ▪ Legal Home	Onboarding ▪ Legal User functions ▪ Add and progress onboarding tasks ▪ Perform conflict checks ▪ Perform credit checks ▪ Approve onboarding ▪ Delete onboarding request Client / Matter ▪ Legal User functions ▪ Create, edit, disable clients and matters ▪ Create, edit, disable practice area, document type Content management ▪ Legal User functions
Legal Admin	▪ Legal Admin ▪ Client Matter Onboarding ▪ Legal Home	Onboarding ▪ Legal User functions ▪ Legal Manager functions Client / Matter ▪ Legal User functions ▪ Legal Manager functions ▪ Delete lookup data: clients, practice area, document types Content management ▪ Legal User functions ▪ Legal Manager functions
Legal Tenant	▪ Legal Admin	Onboarding

Role	Dashboard	Functions
Admin	▪ Client Matter Onboarding ▪ Legal Home ▪ OTDS Access	▪ Legal User functions ▪ Legal Manager functions ▪ Legal Admin functions Client / Matter ▪ Legal User functions ▪ Legal Manager functions ▪ Legal Admin functions Content management ▪ Legal User functions ▪ Legal Manager functions ▪ Legal Admin functions User and group management ▪ Administer user and group permissions within OTDS.

Note: The Legal Tenant Admin role manages user and group assignments outside of the OpenText Legal application.

Who can perform this function?

The following table lists the OpenText Legal function and the required role.

Function	Role			
	Legal User	Legal Manager	Legal Admin	Legal Tenant Admin
Administration				
Lookup data maintenance		•	•	•
Manage users and groups				•
Maintain lookup data outside of the workflow			•	•
Clients				
View a client	•	•	•	•
Delete a client			•	•

Function	Role			
	Legal User	Legal Manager	Legal Admin	Legal Tenant Admin
Create a client		•	•	•
Edit a client		•	•	•
Disable a client		•	•	•
Matters				
View a matter	•	•	•	•
Create a matter		•	•	•
Edit a matter		•	•	•
Disable a matter		•	•	•
Process tasks	•	•	•	•
Practice Area and Document Types				
View a practice area / document type	•	•	•	•
Delete a practice area / document type			•	•
Create a practice area / document type		•	•	•
Edit a practice area / document type		•	•	•
Disable a practice area / document type		•	•	•
Documents				
View document metadata	•	•	•	•
View document	•	•	•	•
View folder	•	•	•	•
View document versions	•	•	•	•
Preview the document	•	•	•	•
View audit trail	•	•	•	•
Edit a document metadata	•	•	•	•
Add a document	•	•	•	•

Function	Role			
	Legal User	Legal Manager	Legal Admin	Legal Tenant Admin
Upload a document	•	•	•	•
Download a document	•	•	•	•
Edit document in Office 365	•	•	•	•
Compare	•	•	•	•
Move a document	•	•	•	•
Copy attachment	•	•	•	•
Link attachment	•	•	•	•
Open in Brava viewer	•	•	•	•
Send Email	•	•	•	•
Share externally	•	•	•	•
Share externally with expiry	•	•	•	•
Collaborate on a document (Edit a document in Office 365)	•	•	•	•
Delete a document	•	•	•	•
Client Onboarding				
Initiate client onboarding	•	•	•	•
Process tasks		•	•	•
Add tasks		•	•	•
Conflict check		•	•	•
Credit check		•	•	•
Final approval		•	•	•
Delete onboarding requests		•	•	•
Collaboration features				
Collaborate with internal users	•	•	•	•
Collaborate with external users	•	•	•	•

Appendix B

Deploying the Outlook add-in

You must install the Outlook add-in to use the OpenText Legal Outlook integration. You can install the add-in from your desktop client or from Outlook Web Access.

Note: If you install the add-in from Outlook Web Access, then the add-in is installed for the Outlook client as well.

Before you begin:

- You need to download the manifest file.
- Contact your system administrator for help with this process.

To install the Outlook add-in for Outlook Web Access:

1. Obtain the `legal-angular-outlook-addin-manifest.xml` from your system administrator.
2. Go to outlook.office.com.
3. After you sign in, in the header area, click .
   The Settings pane opens.
4. Click **Manage add-ins**.
5. In the **ADD-INS** tab, select **My add-ins** from the list on the left.
6. In **Custom add-ins**, click the link **Add a custom add-in** and select **Add from file**.
7. Locate the manifest file that you downloaded to your local drive and click **Open**.
   A dialog box opens.
8. Click **Install**.
9. After the file is installed, open or preview an email. You should see a new icon (OpenText Legal) in the email header.

To install the Outlook client on your desktop:

1. In the ribbon, from the Home tab, click (Store Add-ins).
2. In **ADD-INS** tab, select **My add-ins** from the list on the left.
3. In **Custom add-ins**, click the link **Add a custom add-in** and select **Add from file**.
4. Locate the manifest file that you downloaded to your local drive and click **Open**.
   A dialog box opens.

5. Click **Install**.
6. After the file is installed, open a new email.

   You should see a new icon (OpenText Legal) in the ribbon, in the Message tab. When you click , it opens the login screen for the OpenText Legal add-in (in a new pane on the right).

To sign in:

1. In the newly opened pane, enter your OpenText Core user name and password.
2. Click **Sign in**.

You can now access the matter files.