CounselLink®

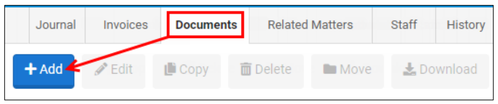
Document management functionality is configured by CounselLink. Your account may not have access to all these features.

UPLOAD DOCUMENTS

Any CounselLink user may add documents. *There is no limit on the number of documents added to a matter. Individual documents cannot exceed 100MB.*

From the Matter Overview Page

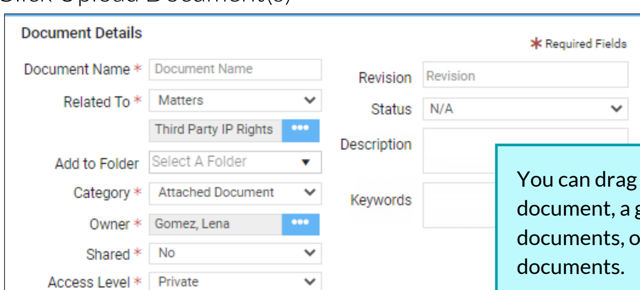
1. Open the Documents tab on the Matter Overview page.
2. Click Add.



3. Drag-and-drop or Browse for a document to add.
4. Complete the Document Details.

<table>
<tr><td>Document Name: Inherits the document title. Change as needed.</td><td>Related To: Auto populates the matter.</td></tr>
<tr><td>Add to Folder: Preselect a folder for the document.</td><td>Category: Select from drop down list.</td></tr>
<tr><td colspan="2">Owner: You will default as the owner. Change as needed.</td></tr>
<tr><td>Shared: Allows or restricts law firm access to a document.</td><td>Access Level: Allows or restricts internal access to a document.</td></tr>
<tr><td colspan="2">Revision, Status, Description and Keywords are optional fields.</td></tr>
</table>

5. Click Upload Document(s)

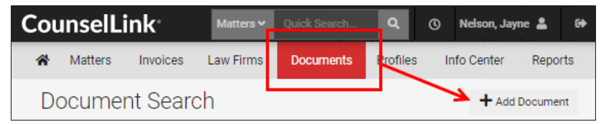


You can drag -and-drop a single document, a group of documents, or a folder of documents.

From the Document Search Page

Access to the Documents tab may be restricted by your administrators. From this page you may add unaffiliated documents to CounselLink. Unaffiliated documents are those not linked to a matter or an invoice.

1. Click the Documents tab at the top of any CounselLink page.
2. Click Add Document.
3. Add the document and select the settings and upload as described in previous section.

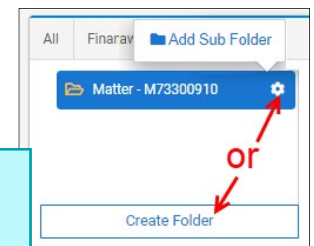


DOCUMENT FOLDERS

Any CounselLink user may move documents into folders and modify document folders. Modification options include adding, deleting, moving, and renaming folders and sub-folders.

Add Folder

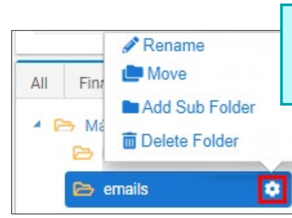
1. From the Matter's Documents tab, click Create Folder or the Gear icon.
2. Name the folder.
3. Click Enter.



Default document folders can be created by your administrator

Modify Folders

1. Click the Gear icon next to any folder.
2. Choose an action: Rename, Move, Add Sub Folder, or Delete Folder.



Deleting a folder does not delete any documents saved in that folder.

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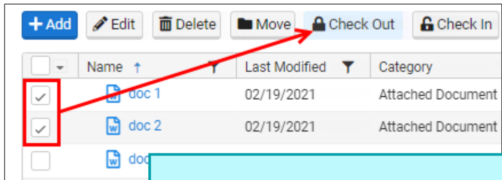
DOCUMENT CHECK-IN AND CHECK-OUT

The Document Check-Out / In feature allows you to control documents while editing them, ensuring the file is not altered by others while it is checked out.

The feature is not enabled for all accounts.

1. From the Matter's Documents tab, select one or more documents with a checkmark.
2. Click Check Out or Check in to lock and unlock documents.



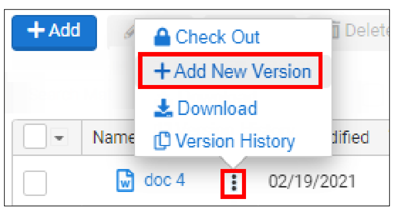
Only document admins and the current document owner can check the document back in.

DOCUMENT VERSIONING

Document Versioning allows users to store and track documents as they are changed.

The feature is not enabled for all accounts.

1. From the Matter's Documents tab, find the +Add New Version icon.
   a. Hover over a document title and click the ellipsis button.
   b. Click the document name and click the Versions Tab.
2. Drag-and-drop or Browse for the latest version of the document.
3. Click Add.



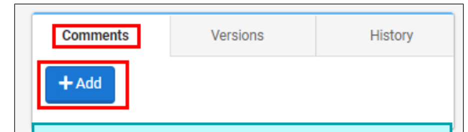
New versions of checked out documents can only be added by a document admin or current document owner.

4. To access older versions of a document, click the document name and select the Versions tab.

DOCUMENT COMMENTS

Add or view comments for any document you can access. All CounselLink users have access to the comment feature.

1. From the Matter's Documents tab, click a document title to open the document details.
2. Click the Comments tab.
3. Click Add.
4. Enter your Comment text.
5. Select your sharing preference.
6. Click Save.



Tag internal CounselLink users in a comment. Type @ and the user's name to notify user of comment via email.

DOCUMENT HISTORY

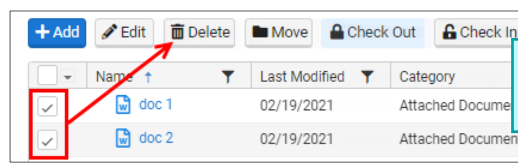
View the document history on any document you can access. History is tracked for all document actions.

1. From the Matter's Documents tab, click a document title to open the document details.
2. Click the History tab.
3. View the event history of the document.

DELETE DOCUMENTS

Delete documents that are no longer needed. Any user with access to the document may delete the document.

1. From the Matter's Documents tab, select one or more documents with a checkmark.
2. Click Delete.
3. A confirmation message displays. Click Delete. All versions of each selected document will be deleted.



Document deletion is recorded in the Matter's History tab

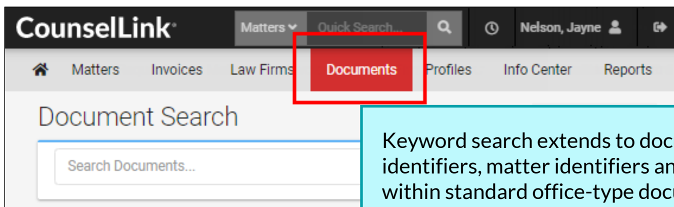
DOCUMENTS ON JOURNALS

Documents may be added to journal entries. These documents are listed under the journal entry and the Documents tab. If you delete the original journal entry the document remains available from the Documents tab. If you delete the document from the Documents tab, it is also removed from the journal entry.

DOCUMENT SEARCHING

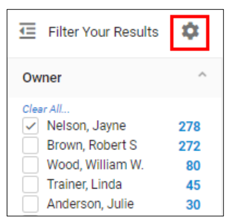
Any user with the Document Search tab may search for documents they have permission to view. Access is controlled by your internal administrators. You may search by keyword or filter to locate documents.

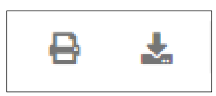
1. Click the Documents tab to access the Document Search page.



Keyword search extends to document identifiers, matter identifiers and will search within standard office-type documents and PDF's. It does not search text in images and password protected documents.

2. Keyword Search:
   a. Enter a keyword.
   b. Click Search.
3. Filter:
   a. Select filter criteria on the left side to narrow the search results.
   b. Click the Edit icon on top of the Filter panel to pick the available filters.
4. Export Search Results:
   a. Select one or more records.
   b. Click the Export Results icon to save the results as a spreadsheet file.





DOCUMENT ACCESS

Document Settings

Document access settings are established at the time of upload and can be edited at any time. Default document settings can be configured on your personal user profile.

- Shared: Do you want to share with outside counsel?
- Access Level: Do you want internal users to have access? If shared, do you want to share with all or only select law firms?

Document Roles

The user role Document Administrator is available on the office or corporate level. This role provides access to private documents.

Shared	Access Level	Who can see?
No	Public	• All internal users with access to the matter • All corporate level document administrators
No	Private	• The document owner • All corporate level document administrators • Select office level document administrators with access to the matter *(determined by matter office)*
Yes	Public	• All internal users with access to the matter • All corporate level document administrators • Outside counsel users from **ALL** assigned firms
Yes	Private	• The document owner • All corporate level document administrators • Select office level document administrators with access to the matter *(determined by matter office)*
Yes	Select Firm	• All internal users with access to the matter • All corporate level document administrators • Outside counsel users from the **selected** firm

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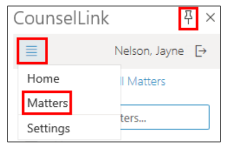
DOCUMENT MANAGEMENT WITH THE ADD-IN FOR OUTLOOK

Availability of the Add-in for Outlook is determined by your corporation's configuration of CounselLink. Always confirm availability with your internal administrators. Installation instructions are available in the Help Center of CounselLink.

The Add-in for Outlook allows you to view matter details and drag-and-drop emails and documents onto matters or matter folders without opening CounselLink. Once uploaded the document details can be edited.

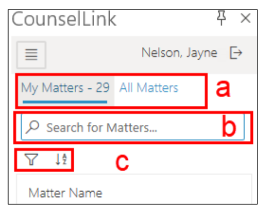
Set up the Add-in Taskpane for Document Management

1. Activate the Add-in Taskpane.
2. Click the Pin icon to pin the Taskpane to Outlook.
3. Click the Menu icon and select Matters to reveal a list of matters.



Add Documents to Matters with the Add-in for Outlook

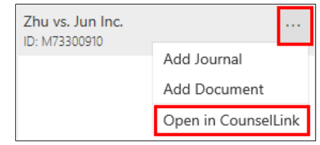
1. Locate your preferred matter or group of matters. Use any of the following tools to narrow your list:
   a. Display a list of all matters or the ones you have categorized as 'My Matters'.
   b. Search by keyword to reveal a list of matters.
   c. Filter or Sort the list of matters.
2. Drag-and-drop any of the following into the matter of your choice.
   a. Emails.
   b. Emails with attachments.
   c. Documents attached to emails.
   d. Documents from your File explorer.



Click the Menu icon and select settings to modify document sharing and access options

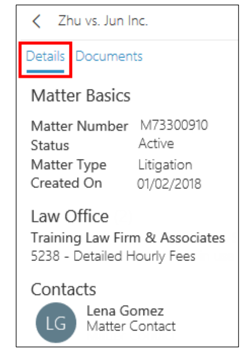
Open Matter in CounselLink from the Add-in

1. From the Matter list, hover over a Matter Name.
2. Click the More Action Menu.
3. Click Open in CounselLink.



View Matter Details in Add-in

1. From the Matter list, click a Matter Name.
2. Click the Details tab.
3. View Matter Information.
   - Basics.
   - Assigned Law Firms.
   - Internal Contacts.
   - Financial information.



Add Documents to Folders from the Add-in

1. From the Matter list, click a Matter Name.
2. Click the Documents tab to view document folders.
3. Drag-and-drop emails or documents into specific folders.

You may click the folders to view the included documents. Click any document name to view document details and version information