THOMSON REUTERS

ELITE™

WORKSPACE

2016.2 USER GUIDE

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INTRODUCTION

The purpose of this document is describe and explain the standard (stock) Workspace user interface within its different configurations. The different areas of Workspace will be explained including individual screens and the sources of the data behind them.

The following will be covered:

- *Differences between the Workspace web application and the Workspace experience within Elite Mobile.*
- *Timer and Timecard features*
- *Workspace Inquiry functionality tying together backend processes of 3E, MatterSphere and Business Development Premier for a more integrated and easier access to data*
- *This document does not address configuration specifically for ProLaw and Envision.*

WORKSPACE WEB & ELITE MOBILE

Workspace is available in both a web interface (from a user's PC desktop) and a mobile interface via the Elite Mobile application. The Workspace experience within Elite Mobile provides access to data and functionality in a manner very similar to the website.

Elite Mobile is a single application that provides different product experiences to the user once the user has logged in. Elite Mobile is a single application for accessing Thomson Reuters Elite products, data and functionality including Workspace, 3E, MatterSphere, ProLaw, Envision and Business Development Premier. While different products may refer to a product-specific mobile experience (e.g., ProLaw Mobile, Envision Mobile or Business Development Premier Mobile), they are all accessed via the one Elite Mobile application.

STOCK CONFIGURATIONS

Workspace is offered with different configurations (i.e., user interface presentations) for the web and mobile experiences. Because Workspace is available for 3E, MatterSphere, and Business Development Premier (BDP) customers, the following configurations exists for the web and mobile platforms:

- 3E-Only
- MatterSphere-Only
- BDP-Only
- 3E + MatterSphere
- 3E + MatterSphere + Business Development Premier
- 3E + BDP

Only one of these configurations will be installed at your site and it will depend upon your firm's licensed product(s).

***Note**: Any BDP features will have standalone functionality. Full integration in Workspace with 3E and MS modules will be available in future releases.*

MINIMUM VERSION REQUIREMENTS

Elite Integration Framework (EIF), Workspace 2016.2 and Elite Mobile 2016.2 requires:

- 3E 2.7.2.5 or higher
- MatterSphere v6.0 or higher
- Business Development Premier 15.2

CONFIGURATION MATRIX

Based on differences between 3E, MatterSphere, and BDP, the stock configurations are very similar. Differences may be found on the initial landing page for both web and mobile versions, within navigation menus, and within detail screen details. Efforts have been made to make screens, views, panels and such appear as similar as possible but differences occur where it makes logical sense based on the individual product, due to the form factor of the device or the device's operating system.

Note: *Any BDP features will have standalone functionality. Full integration in Workspace with 3E and MS modules will be available in future releases.*

CUSTOMIZING CONFIGURATIONS & SCREENS

Each screen within Workspace can be configured to enact changes that may be specific to each firm or personae within the firm. Such configuration changes may include substituting the Thomson Reuters Elite logo with the firm logo, changing the default color scheme, changing a chart from a pie chart to a bar chart, add and/or removing fields from the time entry form, changing the order of columns in a list, etc. All such changes are made in the EIF Designer program.

Information on how to make such changes in the Designer is provided in a separate document. See the *Elite Integration Framework 2016.2 Designer Guide* (KB article #139375) for details on how to customize Workspace.

3E METRIC DEPENDENCIES & SCHEDULING

The 3E/MatterSphere, 3E/MatterSphere/BDP, 3E+BDP and 3E-Only Workspace configurations display various charts and tables for financial statistics, accounts receivable, work in progress and other financial-related information. There is a dependency on 3E metrics for these charts and tables. As such, the metrics need to be scheduled to run at regular intervals. For 3E, all business rules are applied.

The following metrics and their runs are used for Workspace. The exact names of the metric runs may differ at your firm.

Process / Metric	Metric Table Name	Metric Run
Objectives Metric	MxObjectivesKPI	Quantum KPIs
Timekeeper KPI	MxTimekeeperKPIMobile	Timekeeper KPI for Mobile
Matter KPI	MxMatterKPIMobile	Matter KPI for Mobile
Matter Aged AR Metric	MxMatterAgedARMobile	Matter Aged AR for Mobile
Matter Aged WIP Metric (By Aging)	MxMatterAgedWIPMobile	Matter Aged WIP – Mobile
Matter Budget Metric	MxMatterBudgetKPIMobile	MxMatterBudgetKPIMobile
Missing Time Metric	MxMissingTimeKPIMobile	Missing Time for Mobile

If the metrics are not run, or if run and no data exists for the metric, charts and tables in Workspace will be displayed with a *No data to display* message directly in the chart. The lack of a metric run will also prevent a successful drill-down into the metric screen when users select a chart or table to drill-down. Users are presented with the 3E screen to generate the metric rather than the metric itself.

See Appendix B: 3E Metric Parameter Examples for samples of typical parameters used to run metrics.

SOURCE PRODUCT INTERACTION

As described variously in the remainder of this document, Workspace is a single application that integrates data and performs actions that touch various products and third party sites. Where it is logical and where allowed by other systems, Workspace web will launch source products or sites directly within the Workspace window within an iFrame or will either launch a separate browser session for sites where iFrame is not supported or a client application outside of Workspace (e.g., MatterSphere). Such interactions occur in Workspace web when New Action menu items are selected, tasks are selected and the charts and tables are selected in the key performance indicator panels.

DATA SOURCE PRODUCTS

The 2016.2 version of Workspace provides product adapters for 3E, MatterSphere, Business Development Premier, Autonomy iManage and Microsoft Exchange. When one of these is not used at your firm, the adapter(s) can be disabled- see page 71 in the *Elite Integration Framework 2016.2 Designer Guide* document (Article # 139375). The Autonomy iManage adapter is used to display client and matter documents from the iManage document management system. The Exchange adapter is used to display user tasks and appointments from the Exchange server.

LICENSE-BASED DYNAMIC USER INTERFACE

To support multi-license configurations, Workspace dynamically updates its user interface to only display data the user is allowed to see. The system detects which source applications the user has licensed and adds the corresponding menu items and fields accordingly. Previously, this required manual configuration by Elite Services.

If a user does not have permissions to an entity from one of the source applications and tries to access it, Workspace will display an alert.

KEY PERFORMANCE INDICATOR DATA

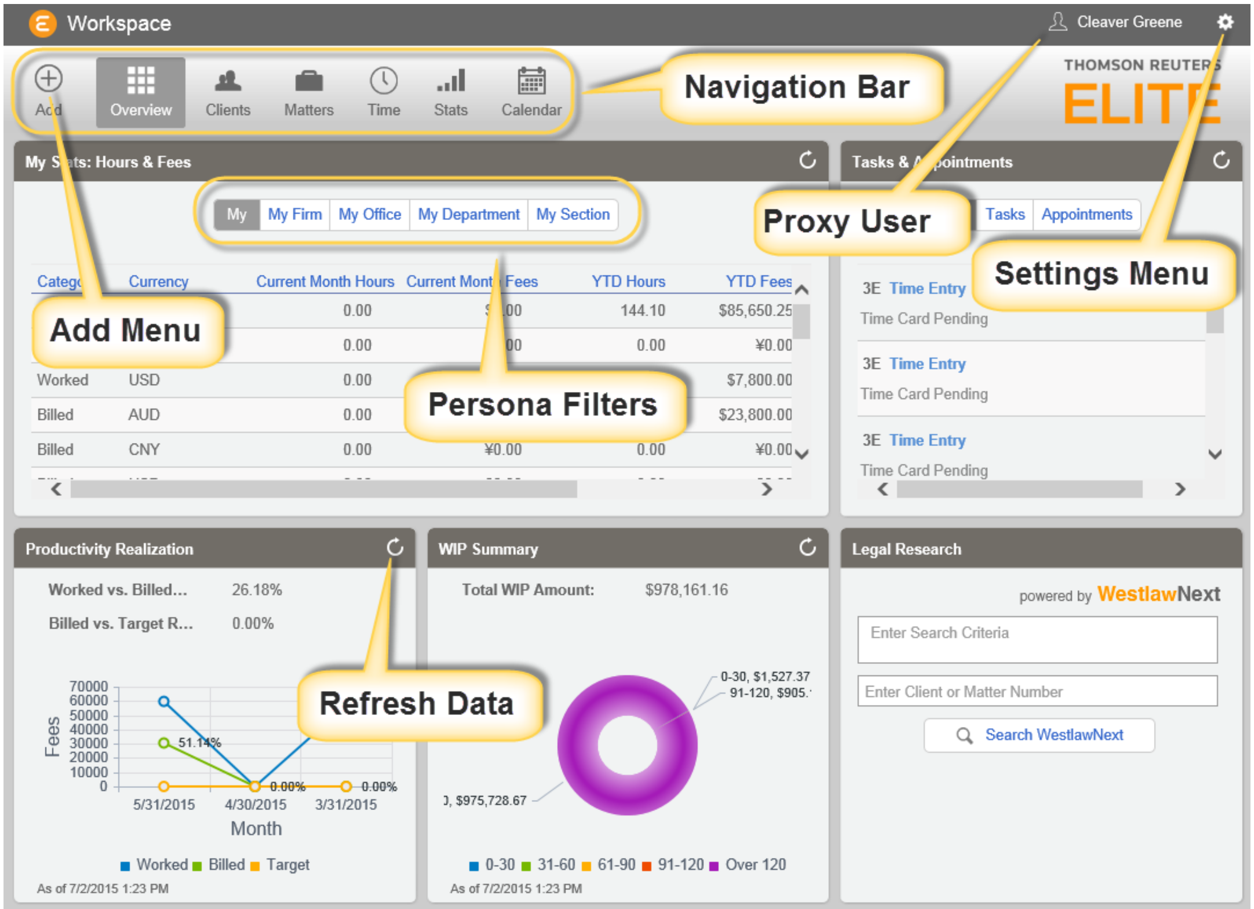
All key performance indicator (KPI) charts in Workspace are sourced from 3E data and are available in the 3E/MS/BDP, 3E/MatterSphere, 3E+BDP and 3E-Only configurations. The charts are not available in the MatterSphere-Only configurations.

NAVIGATION

Workspace is accessible via a website and a mobile application. As much as possible and to the extent possible and logical, the configurations are the same. The user experience in each, however, may be different simply because one platform offers more or less capability than the other. There are also items and functions not available in one that may be available in the other for the same reasons. An example of this is Tasks. Tasks are available in web but not in the mobile app as tasks cannot currently be actioned within Elite Mobile.

WEBSITE

The following section covers how to navigate the Workspace website.



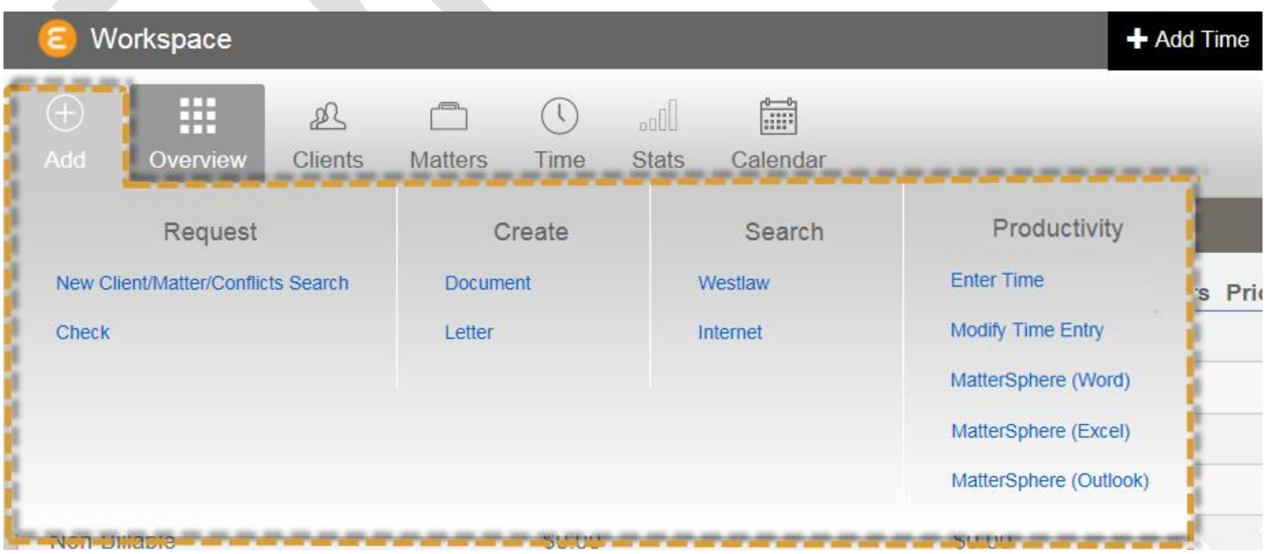
ICONS & BUTTONS

Icons/Buttons	Name	Functions
	Elite Icon	Press this to go back to the **Overview** page.
	Settings	Press to access the Settings Menu
	Proxy User	Press to select a Proxy User
	Time	Press to open the **Add Time** panel. This button only displays when using a display with a small resolution.
	Refresh	Press to update the date displayed in a panel.

Icons/Buttons	Name	Functions
	Menu	Press to open the Time Distribution panel on the Client or Matter pages. This button only displays when using a display with a small resolution.
Timer Applet		***Is this the right color? Style Guide says "LightSilver" on pg 23. The Fill menu shows percentages.
	Start Time	Press to start timing an activity. This becomes a Timecard.
	Start Time	This also starts a new timer. When a timer is running, this changed to the Pause icon.
	Pause Timer	Press this icon to pause a timer in progress. It will then change back to the Start Time arrow icon above.
00:00:09	**Timer Counter**	The numbers change as the timer count increases.
10	**Pending Timecards**	This is the number of Pending Timecards waiting to be finalized and Posted.
	Favorite Timecards	Click to see Posted Timecards that you have marked as favorites in **Time > Posted**. These can be used for cloning.

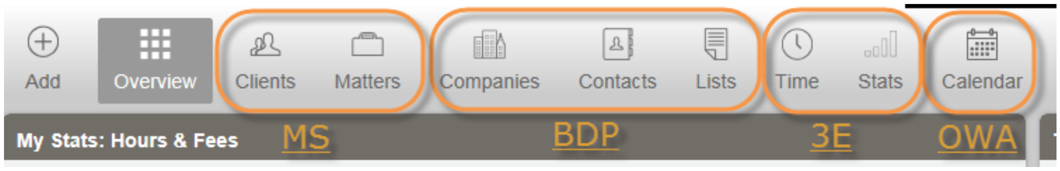
ADD MENU

The Workspace Web configurations provide the Add menu that enables users to perform specified 3E and MatterSphere actions, access Engage, Westlaw Next and other options. The available Add menu actions will grow over time with each release. The menu provides access to specific processes and functions in 3E, MatterSphere and/or BDP and others that will be described below.



AVAILABLE ACTIONS

The table below shows the three stock Workspace web configurations and the features included for each.



***Note**: Any BDP features will have standalone functionality. Full integration in Workspace with 3E and MS modules will be available in future releases.*

Group / Action	3E + MS + BDP (Web)	3E + MS (Web)	3E + BDP (Web)	3E-Only (Web)	BDP-Only (Web)	MS-Only (Web)
REQUEST						
New Client / Matter / Conflicts Search	X	X	X	X		
Check	X	X	X	X		
CREATE						
Document	X	X				X
Letter	X	X				X
Contact			X		X	
Company			X		X	
SEARCH						
Westlaw	X	X	X	X		X
Internet	X	X	X	X		X
PRODUCTIVITY						
Enter Time	X	X	X	X		X
Modify Time Entry	X	X	X	X		
MatterSphere (Word)	X	X				X

Group / Action	3E + MS + BDP (Web)	3E + MS (Web)	3E + BDP (Web)	3E-Only (Web)	BDP-Only (Web)	MS-Only (Web)
MatterSphere (Excel)	X	X				X
MatterSphere (Outlook)	X	X				X

CUSTOMIZE MENU

The **Add** menu options are arranged in groups of similar action types. The groups can be retained, group labels changed or groups eliminated in favor of a basic list. Additional 3E, MatterSphere, and BDP actions can be added subject to any limitations of those systems. Additional actions can be added for calling third party websites. See the **Elite Integration Framework Designer Guide** for more information on making such customizations.

ACTIONS EXPLAINED

The following table describes the functions of each **Add** menu option. See the Available Actions table to check an action's availability with a specific configuration.

Menu Group	Action Definitions
Request	• **New Client/Matter/Conflicts Search** launches the 3E New Business Intake process within Workspace. • **Check** launches the 3E Payment Request process within Workspace.
Create	• **Document** launches Microsoft Word, establishes the MatterSphere connection and launches the document creation wizard in MatterSphere. If Word is already open, the wizard will be displayed automatically. • **Letter** launches Microsoft Word, establishes the MatterSphere connection and launches the letter creation wizard in MatterSphere. If Word is already open, the wizard will be displayed automatically. • **Contact** opens the add Contact form to create a BDP contact. • **Company** opens the add Company form to create a BDP company.
Search	• **Westlaw** launches the Westlaw Next website for easy access to legal research and other information. If the Westlaw cookies are not already saved on the user's computer, the OnePass login screen will be displayed. If the Remember Me option is selected on the OnePass dialog, future logins will be seamless. The Westlaw link can be modified for Westlaw Classic or other global Westlaw sites. • **Internet** launches an internet browser for the configured search site. Google is provided by default, but it can be changed to another site as desired.

Menu Group	Action Definitions
Productivity	• **Enter Time** for the 3E-related configurations, it launches the Time Capture process within Workspace to allow users to create new time entries directly in 3E. This provides an alternative 3E touch-point for time entry to the native Time Entry option provided in Workspace on the Navigation bar as described later in the Time Entry section of this document. For the MatterSphere-Only configuration, it launches the native time entry function for MatterSphere. • **Modify Time** for the 3E-related configurations, it launches the Time Capture process within Workspace allow users to modify time entries directly in 3E. • **MatterSphere (Word)** launches Microsoft Word and establishes the MatterSphere connection or prompts for login if not currently logged in. If Word is already open, the MatterSphere connection will be established if not already connected. • **MatterSphere (Excel)** launches Microsoft Excel and establishes the MatterSphere connection or prompts for login if not currently logged in. If Excel is already open, the MatterSphere connection will be established if not already connected. • **MatterSphere (Outlook)** launches Microsoft Outlook and establishes the MatterSphere connection or prompts for login if not currently logged in. If Outlook is already open, the MatterSphere connection will be established if not already connected.

ELITE MOBILE

Workspace features are available in Elite Mobile, but certain functions behave slightly differently compared to the Workspace web experience. This is done for consistency purposes within the Elite Mobile application and due to the requirements of the device operating systems. This section covers the differences between the web and mobile platforms.

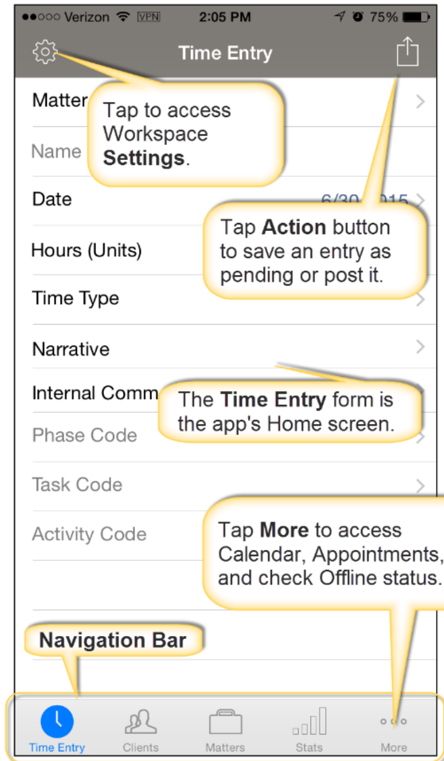
IPAD

The Elite Mobile iPad app layout closely matches the website. The Navigation bar is located at the bottom of the screen. Tasks are not accessible using the app so the Task panel has been removed.

IPHONE

With a few exceptions, the Elite Mobile iPhone app provides many of the core Workspace features. Unlike the Workspace website and the iPad app, there is no Overview page. The Time Entry form is the app's Home page.

***Note**: Features not available with the iPhone: WestlawNext, Proxy Users & Time Entry Calendar view.*



ICONS & BUTTONS

The following tables cover icons and buttons used to access various Workspace features in the app.

Icons/Buttons	Name	Functions
	Settings	Click to access the Settings Menu
	Proxy User	Click to select a Proxy User
	Action	Click to access various features. The available options vary by screen.
	Refresh	Click to update the date displayed in a panel.
WestlawNext	**Westlaw**	Click to access the legal research data.
	Offline Records Indicator	This icon shows whether records have been added when the data connection was inactive and if offline records have exceptions upon submission to the server once back online.
	Time Entry	Click to access the Time Entry form.

Icons/Buttons	Name	Functions
	**Filter**	Click to change the Start/End date filters.

NAVIGATION BAR

The Navigation bar is the primary method used to access most of Workspace's key features. The following table shows the standard options for each configuration, by platform.

Notes:

- *The order of the available options vary by platform.*
- *Any BDP features will have standalone functionality. Full integration in Workspace with 3E and MS modules will be available in future releases.*
- *X = Available option*

Navigation bar	3E + MS + BDP	3E + MS	3E + BDP	3E	MS	BDP	Platform
Add	X	X	X	X	X	X	Web
Overview	X	X	X	X	X	X	Web, iPad
Clients	X	X	X	X	X		Web, iPad, iPhone
Matters	X	X	X	X	X		Web, iPad, iPhone
Time	X	X	X	X	X		Web, iPad, iPhone
Stats	X	X	X	X			Web, iPad, iPhone
Calendar	X	X	X	X	X		Web, iPad, iPhone
Companies	X		X			X	Web, iPad, iPhone
Contacts	X		X		X	X	Web, iPad, iPhone
Lists	X		X			X	Web, iPad, iPhone

FUNCTIONS

The following section provides instructions for accessing and completing various tasks within Workspace.

ROLES, PERSONAE AND PROXY USERS

Roles and Personae are set up in Designer and are unrelated to permissions and security access control. Access control is configured in the user profiles in the source system, 3E, MatterSphere and/or BDP. As such, Roles and Personae are UI configurations for different users. For example, a Manager would want to see different data from a Timekeeper. See the *Elite Integration Framework 2016.2 Designer Guide (KB article # 139375)* for instructions.

ROLES

There are three Workspace Roles: Admin, Service and Debug. Only the Admin Role has a feature in Workspace. Admins can change user accounts, proxies (see the next section) and store requests in the EIF Designer.

PERSONAE

Personae determine the UI configuration for a user logged into Workspace.

INQUIRY

There are no screens specific to Inquiry functionality; correspondingly, there are no preformatted settings for it in the EIF Designer. As such, Inquiry functionality does not impact the UI at all. It's solely a backend tie-in for calling forth MS and 3E data for better integration into the Workspace UI.

Inquiry functionality combines key data from Timekeeping, Billing, Matter and Client elements of 3E and MatterSphere and provides convenient, streamlined functionality tailored to three managerial personae:

- Timekeeper
- Partner
- Managing Partner

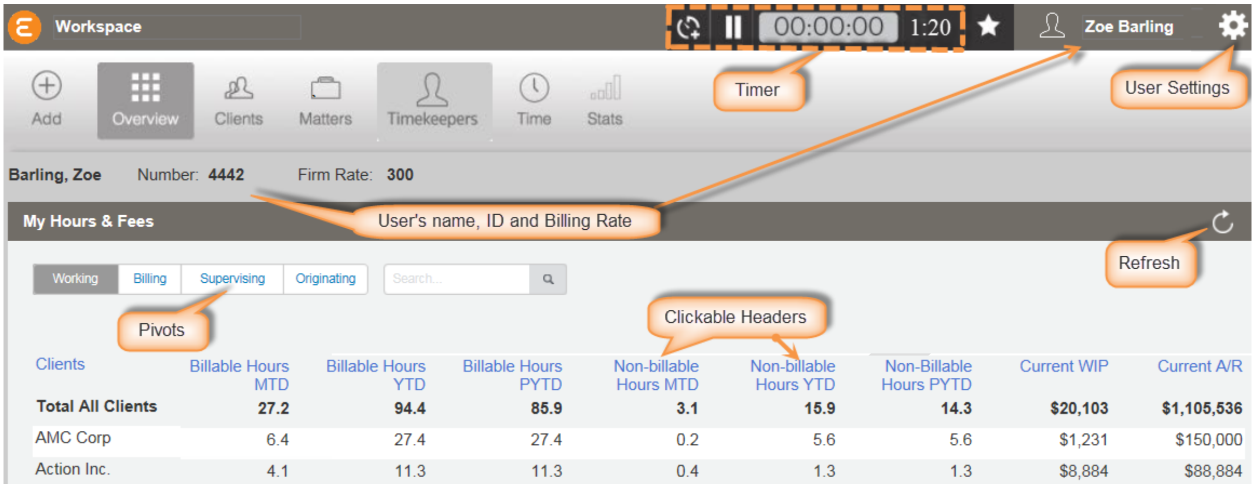
The following shows Inquiry functionality when driven by these Timekeeper Personae.

Note: *Users with Inquiry capability might also have other functions built into their permissions like BDP, or restrictions which have the additional effect of reducing their Inquiry functionality. This means their UI when logging in will probably not match the screenshots here.*

OVERVIEW TAB FOR TIMEKEEPER AND PARTNER PERSONAE

For the **Timekeeper** and **Partner** Personae, the **Overview** page shows only the My Hours & Fees panel. This can be set to the roles the Timekeeper plays for various clients: Working Timekeeper, Billing Timekeeper, Supervising Timekeeper or Originating Timekeeper.

1. Press **Overview > Client row** to review 3E metrics, including Matter Numbers and Descriptions, Billing Timekeepers, Hours and value, amounts billed and collected, and AR and WIP totals.
2. Next, press a Matter row to drill down and review Financials, Details, Team, Related Parties, Budget Details, Billing Realization A/R Aging and WIP aging.



OVERVIEW TAB FOR MANAGING PARTNER PERSONA

For the **Managing Partner**, the **Overview** page has two panels: Client Matter Analysis and Working Timekeeper Analysis, both of which are organized by Department. Data consists of worked amounts, Write Up/Down Amounts, Billed and Collected amounts, and WIP, A/R and Realization Totals.

TIMEKEEPERS TAB FOR TIMEKEEPER AND PARTNER PERSONAE

The **Timekeepers** page shows all, favorite and recently accessed Timekeepers, their titles and departments, offices and sections along with their rates, graduation dates and statuses.

Click on a Timekeeper row to review that individual's billable and non-billable hours, Current WIP and Current A/R.

TIMEKEEPERS TAB FOR MANAGING PARTNER PERSONA

For the **Managing Partner**, the **Timekeeper** page shows the names, hours and financial data for people in a Timekeeper role.

PROXY USERS

Workspace users can act on behalf of other staff designated as proxy users in Workspace. For example, User A can therefore act as User B. An active user can toggle between acting for themselves and other proxy users. Workspace users cannot designate themselves as proxies for other users.

Notes:

- *Only users with the Admin Role can create proxy users.*
- *Because users proxied as others have all the rights of the proxy user, caution is warranted when granting proxy rights.*
- *Proxy user functionality is available for the Workspace website and the Elite Mobile iPad app. It is not available in the iPhone app. You can only create or delete proxy users in the Workspace website. An administrative function for maintaining proxy users for all users is available in the EIF Designer. See the Elite Integration Framework 2016.2 Designer Guide (KB article # 139375) for instructions.*

CREATE PROXY USERS

Users can designate other users to can act as themselves by setting them up as proxies directly with the Workspace web application. For example, User A is able to designate User B and User C as proxies. This will allow B or C to act as A. Users cannot designate themselves as the proxy for another user (e.g., User A cannot designate himself as a proxy for User D).

Do the following to designate someone as a proxy user:

1. Click the **Settings** (gear) icon and select **Admin** from the drop-down menu.
2. On the Proxy User Admin tab, select a user from the drop-down list and click **Add Proxy User**. Repeat to add other users.
3. Click **Save Changes**.

Note*: Proxy users can also be set up using the EIF Designer. The Designer option enables you to centrally maintain proxy user creation.*

DELETE PROXY USERS

Do the following to remove someone from your list of proxy users:

1. Click the **Settings** (gear) icon and select **Admin** from the drop-down menu.
2. On the Proxy User Admin tab, select the check box adjacent to one or more users to be deleted.
3. Click **Delete**.
4. Click **Save Changes**.

WORK AS A PROXY USER

1. In the Workspace site or the iPad app, click or tap the **Proxy** button or user name on the title bar.
2. Select a proxy user. Once selected the title bar displays *Working as: [proxy user name]* indicating you are in proxy mode.
3. Select **Proxy** again and select your name to work as yourself or select another proxy user.

MODIFY ENTITY DETAIL

Client and matter detail can be edited directly in Workspace. Data modifications are synced back to source products (e.g., 3E or MatterSphere) integrated with Workspace.

Note*: The edit functionality can be disabled in the Designer. See the Elite Integration Framework 2016.2 Designer Guide (KB article #139375) for instructions.*

EDIT CLIENT DETAILS

Do the following to edit Client Details:

1. Click **Clients** on the **Navigation** bar.
2. Select a record from the displayed list.

   Note*: Use the filters and* ***Search*** *field to narrow the list of displayed records.*
3. If using the website, skip to the next step; otherwise, do one of the following:
   - **iPad** – Tap **Edit**.
   - **iPhone** – Tap **Details** and then **Edit**.
4. Edit the Details information and click **Save**.

EDIT MATTER DETAILS

Do the following to edit Matter Details:

1. Click **Matters** on the **Navigation** bar.
2. Select a record from the displayed list.

   ***Note**: Use the filters and **Search** field to narrow the list of displayed records.*
3. If using the website, skip to the next step; otherwise, do one of the following:
   - **iPad** – Tap **Edit**.
   - **iPhone** – Tap **Details** and then **Edit**.
4. Edit the Details information and click **Save**.

TIME ENTRY (WEBSITE)

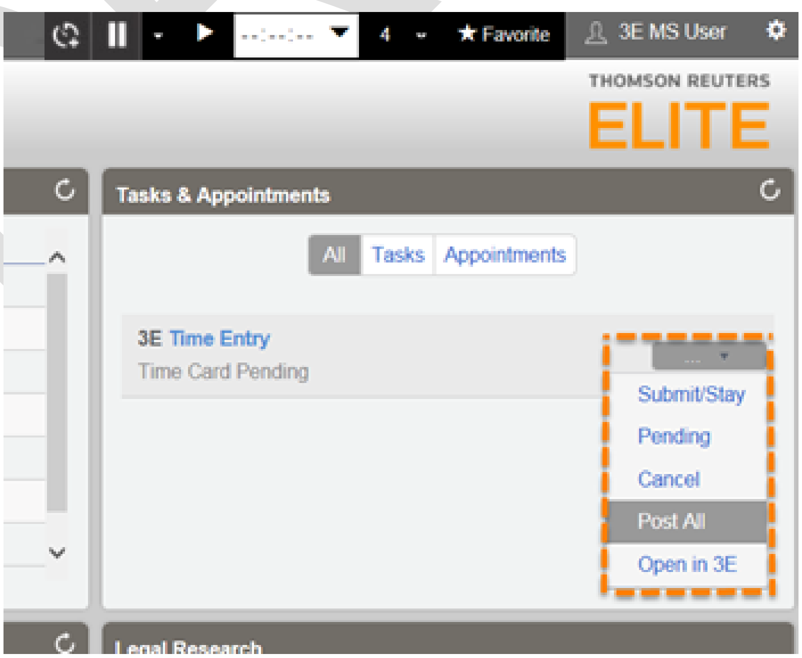
The Workspace Time Entry feature is a real-time tracker accessible from every screen. The following sections provide instructions on entering time for various tasks. Time entries can either be saved as Pending or posted immediately. Pending records can also be cloned to expedite data entry. Users can view both posted and Pending records.

- *The date defaults to today's date and cannot be backdated nor edited, even if the status is still Pending.*
- *Pending entries are listed in the **Overview > Tasks & Appointments** panel.*
- *Timers cannot be added via the main Time menu. Instead, Time lists all time cards, Pending and Posted and provides editing capability.*

OVERVIEW > TASKS & APPOINTMENTS

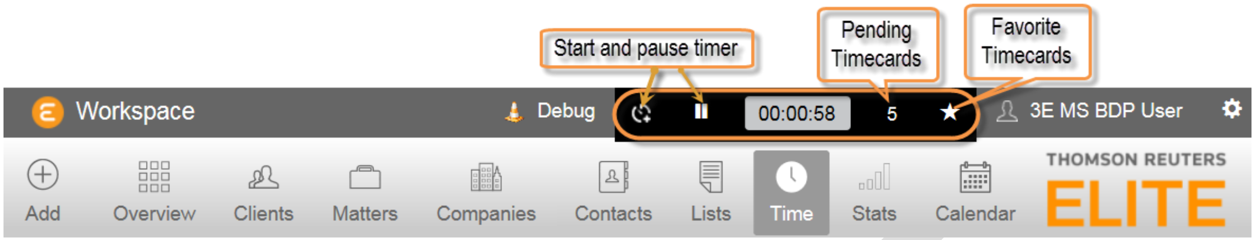
In this panel, under **ALL**, Pending Timecards, Tasks and Appointments are shown. The Tasks and Appointments pull in from your firm's Microsoft Exchange server, 3E and/or MatterSphere and/or BDP.

Mousing-Over Pending Timecards reveals a drop-down menu. Post ALL will submit multiple timecards:



+ADD TIME

The Timer bar on the right-hand side of the Workspace header provides a quick way to add new timers.



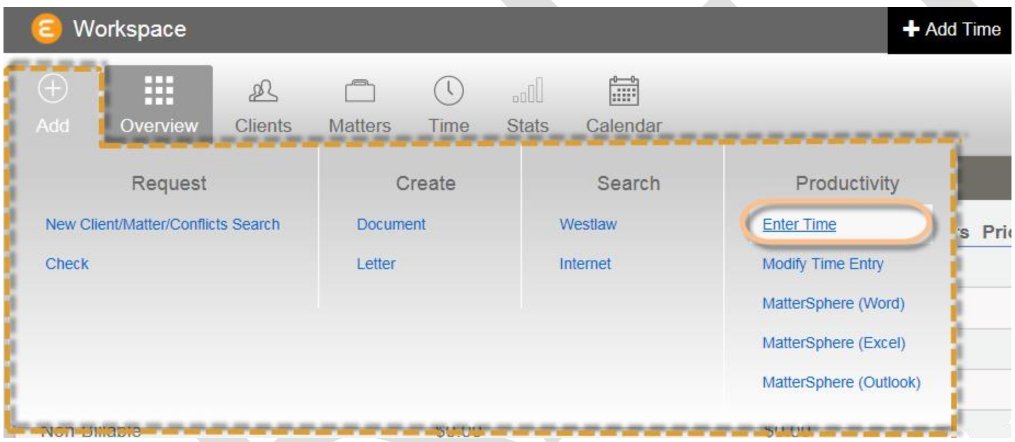
Adding New Timers

1. There are two ways to add a timer.

    a. Click the circular icon in the Timer Bar. Each time the user clicks this, it will start a new timer. Note that only one timer will run at a time.

    Note: *Each subsequent timer will be paused and logged as Pending.*

    b. Click on the **Add** menu button. In the Productivity section on the right, click "Enter Time".



This opens the 3E Time Capture page. Timecards started in 3E must be stopped, started and edited in 3E.

- *When in 3E, the Time bar will be greyed out.*

2. The timer will count as you use Workspace.

3. When done, click the **Pause icon** to stop the timer.
   Or
   Click the **Timing Counter.** This opens a slide-out panel to add details. The **Pause icon** is in the upper left-hand side of the panel and toggles between Play and Pause.

    - Time intervals can be edited. Pause the counter and type over the amounts for the hour, minutes or seconds sections. An orange **Save** button will appear to the right of the intervals. Alternatively, click either the **Pending Update** or **Post** buttons in the bottom right.

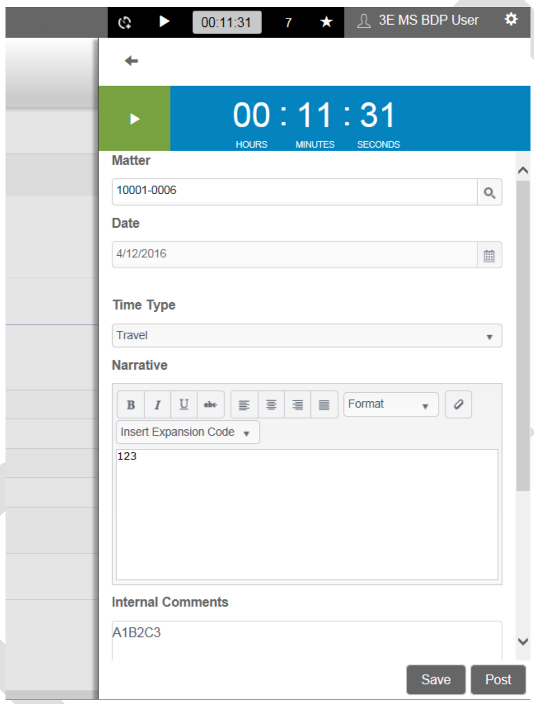
    - The **Pause** and **Play icons** are synchronized in the counter and the panel.

    - If the pertinent Matter is not in the drop-down menu, contact an Admin-Level user.

    - **Phase Code**, **Task Code** and **Activity Code** options are all part of the matter configuration.

- Add narratives as needed. Codes can be applied automatically by selecting an **Expansion Code** as configured by Admin-Level users.
- If insufficient information is entered in the Timecard, an error message will be displayed, prompting the user to make corrections.
    - Click **Save** to retain changes. The Timecard log will automatically close.
    - If not saved, the time card is still retained in the Timecard log with no details.
- Click the **Close** button above time strip and to the left to exit the panel. The user will be prompted to save changes.

4. Click **Update Pending** or **Post** in the bottom right corner to save the Timecard. It can then be accessed in the **Time and Overview > Tasks & Appointments** menus.



5. Fill out the Add Time form as instructed by the [Add Time Field Definitions](#).

Notes:

- Depending on your screen's resolution the Add Time form will not automatically display. Click the **Add Time** icon  to open the form.
- *The Add Time form can* also *be accessed on the Client and Matters details pages by clicking the* ***Add Time*** *button.*

EDITING PENDING TIME ENTRIES

The ability to edit Timecards depends on your user access. Do one of the following to edit pending time entries:

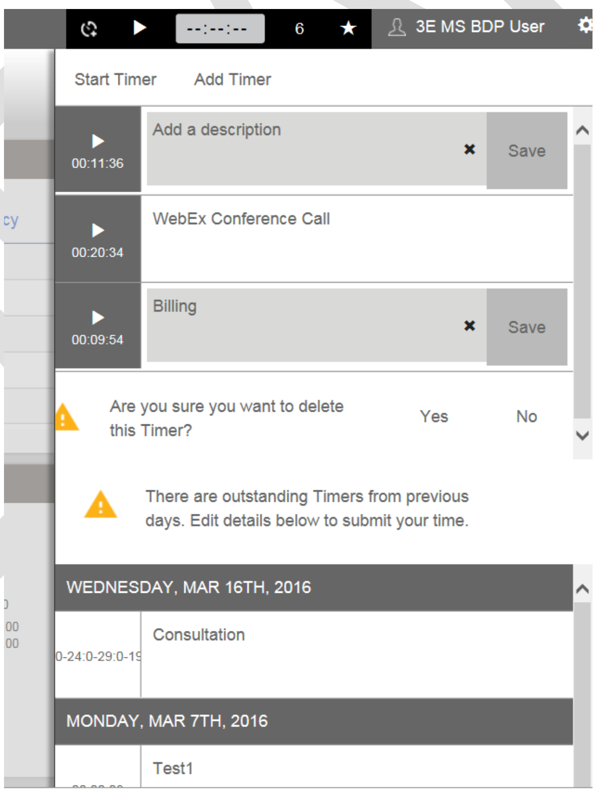
Pending Time Entry List

1. Select **Time** from the **Navigation** bar and click **Pending**.
2. Click a listed pending entry. The Add Time form displays with the pending entry's details.

   Note: *If the entry isn't displayed, use the Search or **Start/End** Date fields to narrow the list of pending entries.*
3. Make the required changes and click **Save**.

Timecard Edit List

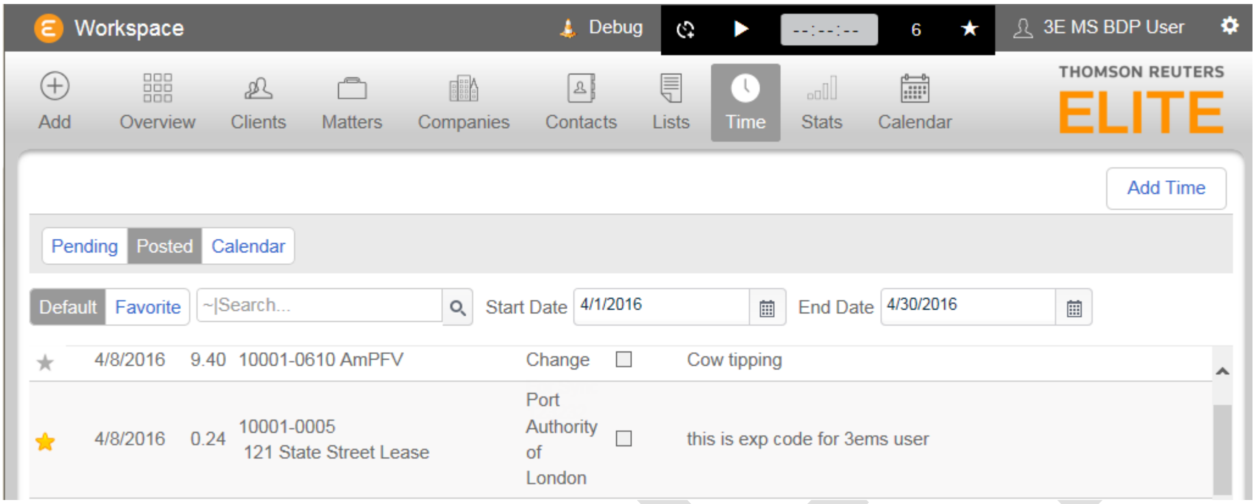
1. *In the **Add Time** header, click the **number** to the right of the timer intervals. This is the number of un-submitted Pending timers. Note that if there is no number, there are no Pending entries to edit.*
2. *A panel will slide open with a list of all Pending entries. Options include:*
   - *Mouse over an entry to see **Pencil Edit icon** and **Delete icon** buttons on the right-hand side. Clicking the Pencil Edit Icon will open the listing so all details may be edited such as the time intervals, the Matter, The Time Type, etc..*
   - *Alternatively, if desired, you can edit only the title field by clicking on it. When editing the title, a **Save** button will appear on the right.*
3. *Click **Update Pending** or **Post** at the bottom right to save the changes. Note that if **Post** is selected, the entry will no longer be listed in the **Add Time** section.*



Note: *If the option to edit a record is not available, this could be because you do not have rights to edit in the source product; the Workspace configuration has been modified to remove the edit function; or another user has the record locked in 3E.*

FAVORITE TIMECARDS

To mark a timecard as a favorite, usually for the purpose of cloning it later, go to **Time > Posted**, and click on the star on the left.



Note: *A Timecard can also be added from this page.*

PENDING TIME ENTRY MULTI-EDIT VIEW

Pending time entries can now be edited in Workspace using the new Multi-edit list in the Time Entry Calendar view.

To edit a pending time entry:

1. Select **Time** from the **Navigation** bar and click **Calendar**.
2. Click the pending hours/units value displayed for a day. All pending entries for the selected day display in the Multi-edit view.
3. Edit the pending entries as instructed by the Multi-Edit View field definitions.
4. Once edits are complete, select the adjacent checkboxes for the updated entries and click **Save**.

CLONING PENDING TIME ENTRIES

Do the following to clone pending time entries:

1. Select **Time** from the **Navigation** bar and click **Pending**.
2. When hovering the mouse over an item in the list, in the **Non-Billable** column on the right, an **Actions** menu will appear.
3. Click on or hover over the **Actions** menu and **Clone** will be displayed. Depending on your access, there may be other options in this menu, as well.
4. On the **Clone** form, make desired modifications such as editing the matter, date, time, etc., and click **Save**. The default is all details are cloned, except time.

Note*: Pending entries can also be cloned from the Multi-edit View by clicking the* ***Clone*** *button for a listed entry. See the Pending Time Entry Multi-Edit View field definitions for further details.*

POSTING PENDING TIME ENTRIES

Do one of the following to post pending time entries:

Pending Time Entry List

1. Select **Time** from the **Navigation** bar and click **Pending**.
2. Do one of the following:
   - **Post Individual Time Entries** - Select the check boxes for individual time entries to be posted and click **Post Selected**.
   - **Post All Time Entries** – Click **Post All** to post all unposted time entries.

   ***Note**: If the entry isn't displayed, use the Search or Start/End Date fields to narrow the list of pending entries.*

Time Entry Calendar View

1. Select **Time** from the **Navigation** bar and click **Calendar**.
2. Do one of the following:
   - **Post Month's Entries** – Navigate to the month containing the entries to be posted and click **Post All**.
   - **Post a Day's Entries** - Select the check box for that Calendar day and click **Post Selected**.

VIEWING POSTED TIME ENTRIES

Do the following to view posted time entries:

1. Select **Time** from the **Navigation** bar.
2. Do one of the following:
   - **Posted Time Entry List -** Click **Posted** to view a list of posted time entries based on a specified date range or search criteria. Click a posted entry to view its details in read-only mode.
   - **Time Entry Calendar View –** Click **Calendar** to view time posted for the month.

VIEW MISSING TIME ENTRIES

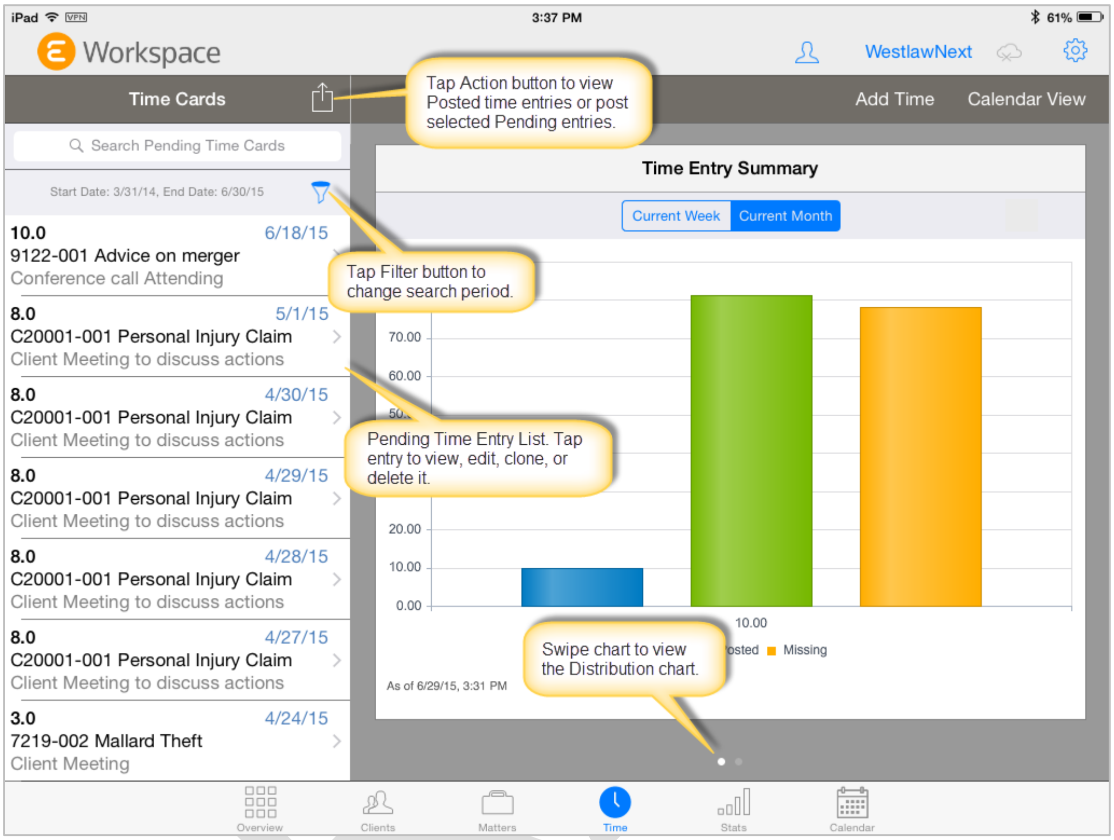
Do the following to view missing time entries:

1. Navigate to the Time Entry page and click **Calendar**.
2. Select the **View Missing** check box.

***Note**: The view Missing Time option can be disabled using the Designer. See the Elite Integration Framework 2016.2 Designer Guide (KB article # 139375) for instructions.*

TIME ENTRY (ELITE MOBILE)

The following sections provide instructions on entering entries for time worked. In Workspace, you can enter time and save entries as pending or post them immediately. Pending records can be cloned to expedite data entry. You can also view posted and missing time records. Entries can be dragged to change the order of the list.



ENTERING TIME

Do the following to enter time using the Workspace Add Time form:

IPAD APP

1. Click **Time** on the **Navigation** bar.
2. Tap **Add Time** and fill out the form as instructed by the Add Time Field Definitions.

   Note*: The Add Time form can also be accessed on the Client and Matters details pages by clicking the* ***Add Time*** *button.*
3. Click **Save** or **Save & Post**.

IPHONE APP

1. Fill out the **Time Entry** form, the iPhone app's Home screen, as instructed by the Add Time Field Definitions.

   Note*: The* ***Time Entry*** *form can also be accessed on the Client and Matters details pages by clicking the* ***Add Time*** *button.*
2. Tap the **Action** button and select **Save** or **Save & Post**.

EDITING PENDING TIME ENTRIES

Do one of the following to edit pending time entries:

Pending Time Entry List

1. Tap **Time** on the **Navigation** bar.
2. Tap an entry in the **Pending Entry** list, the **Add Time Entry** form displays with the pending entry's details.

   Note*: If the entry isn't displayed, use the* ***Search*** *field or edit the* ***Start/End Date*** *filter to narrow the list of pending entries.*

3. Tap **Edit** and make the required changes and click **Save** or **Save & Post**.

Note*: If the option to edit a record is not available, this could be because you do not have rights to edit in the source product; the Workspace configuration has been modified to remove the edit function; another user has the record locked in 3E.*

Time Entry Calendar View

1. Tap **Time** on the **Navigation** bar and tap **Calendar View**.
2. Locate the day on which the pending entries were added and tap the displayed value (e.g., Pending 7.00), a list of pending timecards displays.
3. Tap the entry to be edited.
4. Tap **Edit** and make the required changes and click **Save** or **Save & Post.**

CLONING PENDING TIME ENTRIES

Do the following to clone pending time entries:

1. Tap **Time** on the **Navigation** bar.
2. Tap an entry in the **Pending Entry** list, the **Add Time Entry** form displays with the pending entry's details.

   Note*: If the entry isn't displayed, use the* ***Search*** *field or edit the* ***Start/End Date*** *filter to narrow the list of pending entries.*

3. Tap **Clone** and make the required changes and click **Save** or **Save & Post**.

POSTING PENDING TIME ENTRIES

Do one of the following to post pending time entries:

Pending Time Entry List

Note*: Users can only select individual entries using this method.*

1. Tap **Time** on the **Navigation** bar.
2. Tap the Action button and select Post Selected.
3. On the pop-up, tap the entries to be posted and tap **Post Selected**.
4. Tap **Ok** on confirmation message.

Time Entry Calendar View

1. Tap **Time** on the **Navigation** bar and click **Calendar View**.
2. Select the month with the pending entries to be posted.

3. Tap the **Action** button and do one of the following:
   - **Post Month's Entries** –Select **Post All**. Tap **Yes** on the confirmation message.
   - **Post Entries for Individual Day's** – Choose **Select to Post** and choose the Calendar days with the entries to be posted and Tap **Post Selected**.

VIEWING POSTED TIME ENTRIES

Do the following to view posted time entries:

1. Tap **Time** on the **Navigation** bar.
2. Do one of the following:
   - **Posted Time Entry List –** Tap the **Action** button and select **View Posted,** a pop-up screen opens, listing posted time entries based on a specified date range or search criteria.
   - **Time Entry Calendar View –** Tap **Calendar View** to view time posted for the month.

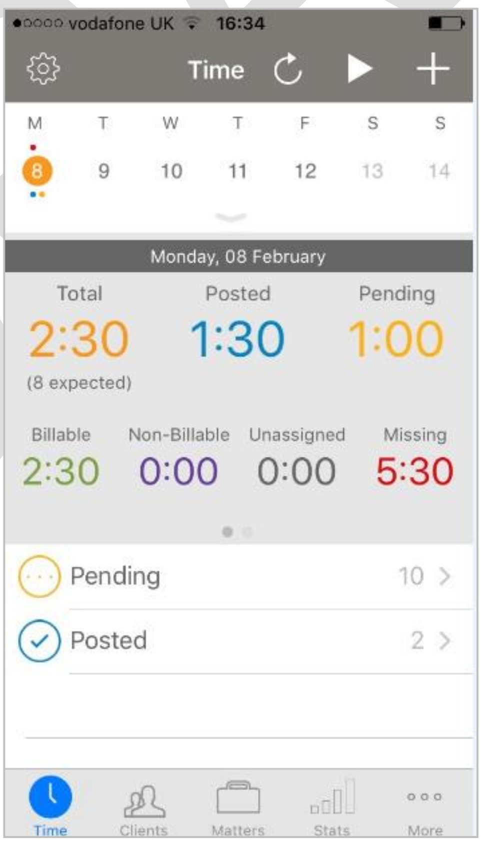
VIEW MISSING TIME ENTRIES

Do the following to view missing time entries:

1. Tap **Time** on the **Navigation** bar and click **Calendar View**.
2. Tap the **View Missing** option.

CALENDAR VIEW

Elite Mobile provides a Calendar View displaying an overview of the time the user has spent over a day, week or month. There is a list of active timers and users can view pending and posted time.



VIEW OUTLOOK CALENDAR

***Note**: The Calendar Navigation bar item is set to call the elite.com website when installed. The Calendar Navigation bar function is intended to launch the Outlook Web Access calendar. It must be configured to do so as the stock installation sets the URL to www.elite.com. Please see the Calendar Field Definitions section later in this document for more information.*

Do the following to access your Outlook Calendar through Workspace:

1. Click **Calendar** on the **Navigation** bar.
2. Enter you login credentials and click **Log On**.

VIEW APPOINTMENTS

If Workspace is integrated with your firm's Microsoft Exchange server, you can view Appointments in the **Task & Appointments** panel on the Overview page.

MANAGE TASKS

The Tasks panel on the Overview page are called from integrated source products. You can take action on a task by either clicking it or hovering the mouse over it and making a selection from the Action drop-down list. The options vary by product. See the Task & Appointment Panel field definitions, page 30, for further detail.

***Note**: Tasks cannot be viewed in Elite Mobile.*

WESTLAW SEARCH

If you are a Westlaw user, you can use WestlawNext to conduct legal research, from within Workspace.

WEBSITE

1. Navigate to the **Overview** page and, in the Legal Research panel, enter the search criteria.
2. Enter a Client or Matter number and click **Search WestlawNext**.
3. When prompted, enter your login criteria including any **Remember** options to persist your login information the next time you access it.

ELITE MOBILE

If using the Elite Mobile app, tap **WestlawNext** on the app's title bar and log in to the search service. This option is only available with the iPad app.

***Note**: To use this feature, the WestlawNext app must be installed on your iPad.*

MOBILE SPECIFIC FUNCTIONS

The following section covers procedures specific to the Elite Mobile app.

WORKING OFFLINE WITH ELITE MOBILE

Offline mode is available for the Elite Mobile iPad and iPhone apps. While primarily intended for offline time entry purposes, offline mode is available, cached from the various areas of the app depending on the areas of the app that a user has previously navigated to before going offline such as the Client and Matter list and detail views, Statistics, etc. Views that the user has already navigated to will be cached and available when offline. Rather than display error messages, non-cached views will display the message *This view is Unavailable Offline*.

OFFLINE DATA ENTRY

Data entry for time entry and other forms is available for offline usage. All data entered while offline will be saved locally to the device. Elite Mobile will automatically submit the entry when the data connection is restored.

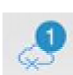
***Note**: Required fields will be noted as such, but as there is no data connection, the business rules of the source application are not available and will not be applied.*

As noted above, data downloaded during an active session is cached for the duration of that session. Data required for query or look-up fields is stored in the encrypted database. Only clients and matter records associated with the active user are cached on the device for the duration of the offline session.

A **Not in list** option displays in drop-down lists, enabling a user to continue with a data entry by entering a value in a particular field when the desired value is not available (e.g., client number, matter number, task code). The **Not in list** option is displayed as the last value in the drop-down list. You can select it and then enter a text value in the field. This value will be stored for the data entry and saved to the device while offline. If the value is an exact match to the actual value from source application, the server (e.g., 3E server) will accept it when the connection is restored; if the value is not an exact match, it will result in an error that must be resolved.

RECORD INDICATOR

The number of records saved for submission while offline is indicated by the counter on the cloud icon in the Elite Mobile title bar. The number in the blue circle indicates the total number of offline records. If the number is displayed in a red circle, it indicates there is an error that needs to be resolved before the record can be successfully submitted.



BACK ONLINE

When the data connection is restored, all pending offline records are automatically submitted to the source product server (e.g., 3E, BDP or MatterSphere) for processing. A notification displays the number of records submitted to the server. When records fail on submission, the title bar counter displays the total number in a record circle that must be resolved. Common errors include missing required fields and values entered with the **Not in list** option that do not match the values listed in the source application's database. When records are submitted without error, the counter is removed and the cloud icon displays as disabled.

To resolve errors, do the following:

1. Tap the **Record** indicator on the app's title bar, a list of records displays.
2. Select a record to access it.
3. Modify the record and save your changes or delete the record.

OFFLINE RECORD NOTIFICATIONS

Elite Mobile notifies you when offline items are ready to be submitted to the source server once the data connection has been restored. You can set the notification timeframe in hours. The timeframe covers the time a record is stored on a device without being submitted to the server, starting from the point the record was saved to the device while offline.

Do the following to configure offline notifications timeframe:

1. Select **Settings > Options > Offline Data Delay**.
2. Choose the number of hours and tap **Select**.

PROXY USERS

If you are currently proxied as another user, you can remain as the proxy user while offline. You can also switch back to your own user record.

***Note**: A user cannot proxy to another designated proxy user while offline. All other proxy user options are disabled while offline.*

ENCRYPTION & SECURITY

Offline data is protected by several levels of security. While the Elite Mobile app can be freely downloaded from the iTunes App Store, in order to use it, it must be authenticated with a valid customer login via Elite's Discovery Gateway. The credentials for communicating with this gateway are stored in Elite Mobile, but encrypted with a user-defined PIN. Communication between the App and the (client-installed) Mobile Gateway is encrypted. All data stored on the device is encrypted with an App-level user-defined PIN as well as the device's built-in security settings. Data entered on the device while offline is cached on the device within an encrypted SQL database.

UPDATE PASSWORD

This option is provided to update the domain password as entered for the mobile app when the domain password is changed. It allows the user to continue to access the app using the supplied credentials without having to completely log out and reset the app.

To change your Workspace username and/or password, do the following:

1. Navigate to **Settings > Options > Update Password**.
2. Update your login credentials and click **Sign in**.

SPECIFY MAP APP

To specify the map application to use to view and get directions to an address:

1. Navigate to **Settings > Options > Map App**.
2. Select either Apple Maps or Google Maps.

MANAGE LOCAL DATA

Use the following options to clear app cache files without having to completely log out of the app. This is useful for troubleshooting (e.g., app running slow) or to see the latest changes made in the EIF Designer (e.g., modified icons/buttons).

RESET VIEWS

Do the following to clear out the app cache for the views if they have modified in the EIF Designer:

1. Navigate to **Settings > Manage Local Data.**
2. Select **Reset Views**.

RESET IMAGES

Do the following to clear out the app cache for the images displayed in the app if they have modified in the EIF Designer:

1. Navigate to **Settings > Manage Local Data**.
2. Select **Reset Images**.

LOCK APP

Do the following to log out of the app:

1. Select the **Settings** button and tap **Lock App**.
2. You will need to enter your PIN to access the app again.

SHARE USAGE DATA

Thomson Reuters Elite collects basic usage data such as number of users, Elite Mobile product configuration (e.g., BDP-Only versus 3E+MS, etc.) and application crashes. Additional information can be viewed at http://www.elite.com/mobileprivacy.

To change the share usage data setting, do the following:

1. Navigate to **Settings > Privacy**.
2. Tap the **Share usage stats** toggle button.

FORMS AND FIELD DEFINITIONS

The following sections outline the individual areas and screens within Workspace, based licenses and the source of the data.

OVERVIEW FIELD DEFINITIONS

The following table shows the items within the Workspace Overview screen, whether the items are included in each configuration (X is included, blank is not included) and the source of the data in square brackets (e.g., [3E]). MatterSphere is abbreviated as MS. Business Development Premier is abbreviated as BDP.

***Note**: The Overview screen is not available with the Elite Mobile iPhone app.*

Website

Item	3E + MS + BDP	3E + MS	3E + BDP	3E-Only	MS-Only	BDP-Only
My Stats	X [3E]	X [3E]	X [3E]	X [3E]		
Tasks & Appointments	X [3E, MS, Exchange]	X [3E, MS, Exchange]	X [3E, Exchange]	X [3E, Exchange]	X [MS, Exchange]	
Productivity Realization	X [3E]	X [3E]	X [3E]	X [3E]		
WIP Summary	X [3E]	X [3E]	X [3E]	X [3E]		
Legal Research	X	X		X	X	
Companies	X [BDP]		X [BDP]			X [BDP]
Contacts	X [BDP]		X [BDP]			X [BDP]
Lists	X [BDP]		X [BDP]			X [BDP]

Mobile

Item	3E + MS + BDP	3E + MS	3E + BDP	3E-Only	MS-Only	BDP-Only
My Stats	X [3E]	X [3E]	X [3E]	X [3E]		
Tasks & Appointments	X [3E, MS, Exchange]	X [3E, MS, Exchange]	X [3E, Exchange]	X [3E, Exchange]	X [MS, Exchange]	
Productivity Realization	X [3E]	X [3E]	X [3E]	X [3E]		
WIP Summary	X [3E]	X [3E]	X [3E]	X [3E]		
WestlawNext (Title bar)	X	X	X	X	X	
Companies	X [BDP]		X [BDP]			X [BDP]
Contacts	X [BDP]		X [BDP]			X [BDP]
Lists	X [BDP]		X [BDP]			X [BDP]

MY STATS: HOURS & FEES PANEL

On the Overview page, under My Stats: Hours & Fees, the table displays financial statistics for the user including worked and billed hours and costs, write-offs, non-billable, WIP and A/R for the current month, year to date (YTD) and prior year to date.

Click a column header to sort the list in ascending or descending order.

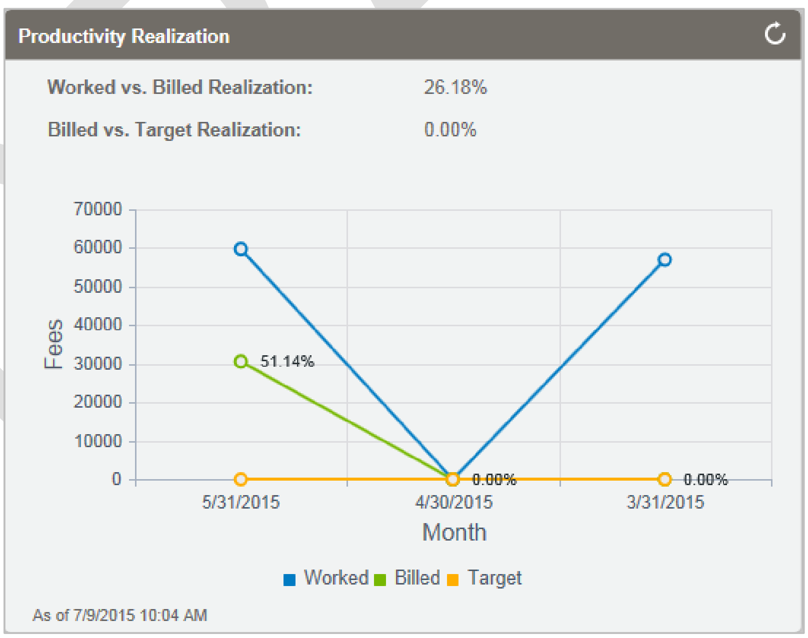
To view additional detail, users can click anywhere in the table to drill into the data. Upon selection, the

Category	Currency	Current Month Hours	Current Month Fees	YTD Hours	YTD Fees	Prior YTD Hours	Prior YTD Fees
Worked	CAD	0.00	$0.00	0.00	$0.00	0.00	$0.00
Worked	USD	0.00	$0.00	5.00	$1,625.00	594.20	$277,506.05
Billed	CAD	0.00	$0.00	0.00	$0.00	0.00	$0.00
Billed	USD	0.00	$0.00	0.00	$0.00	343.80	$184,251.05
Received	CAD	0.00	$0.00	0.00	$0.00	0.00	$0.00
Received	USD	0.00	$0.00	0.00	$0.00	276.25	$112,543.50
Write-offs	CAD		$0.00		$0.00		$0.00
Write-offs	USD		$0.00		$0.00		$0.00
Costs Worked	CAD		$0.00		$0.00		$0.00

3E Working Timekeeper Inquiry dashboard will be displayed for the current user.

PRODUCTIVITY REALIZATION PANEL

The Productivity Realization chart displays worked vs billed realization and billed vs target realization for the current user. The calculations are based on time entered, billed and time target objectives.

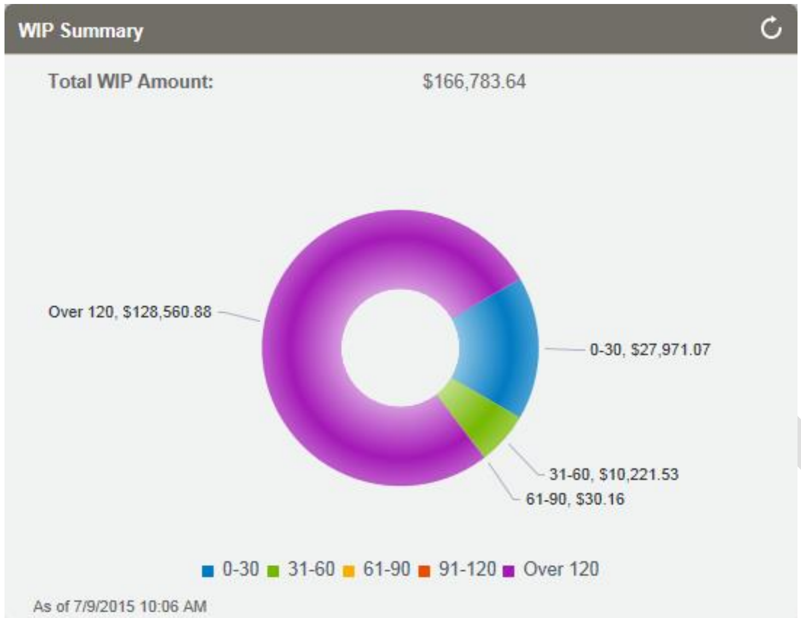


To view additional detail, users can click any point in the chart to drill into the data. Upon selection, the 3E Working Timekeeper Inquiry dashboard will be displayed for the current user.

***Note**: Click the colored box in a chart or graph's legend to filter the displayed information.*

WIP SUMMARY PANEL

The WIP Summary chart displays current work in progress information for the current user for different lengths of time. The aging buckets are based on those currently defined in 3E for your firm.



To view additional detail, users can click any segment in the chart to drill into the data. Upon selection, the 3E Aged WIP – Billing Timekeeper Detail metric will be displayed.

Notes:

- *Click the colored box in a chart or graph's legend to filter the displayed information.*
- *The Total WIP Amount doesn't display in the mobile app.*

TASKS & APPOINTMENTS PANEL

Tasks are displayed from 3E, MatterSphere and/or Microsoft Exchange. The tasks from 3E are the same as those on the user's Action list in 3E. The tasks from MatterSphere are those from the user's task list in Command Centre. Exchange tasks are those from the user's task list in Outlook.

Appointments are displayed from Microsoft Exchange and are those from the user's calendar in Outlook.

Filters

Click one of the filters (ALL/Tasks/Appointments) to filter the list of displayed tasks and appointments.

Tasks & Appointments

You can take action on a task and appointment. The available actions are dependent upon those from the source system. 3E tasks will be displayed with available 3E output options; BDP and MatterSphere tasks can be selected to open MatterSphere to the user's Command Centre; Exchange tasks can be marked completed.

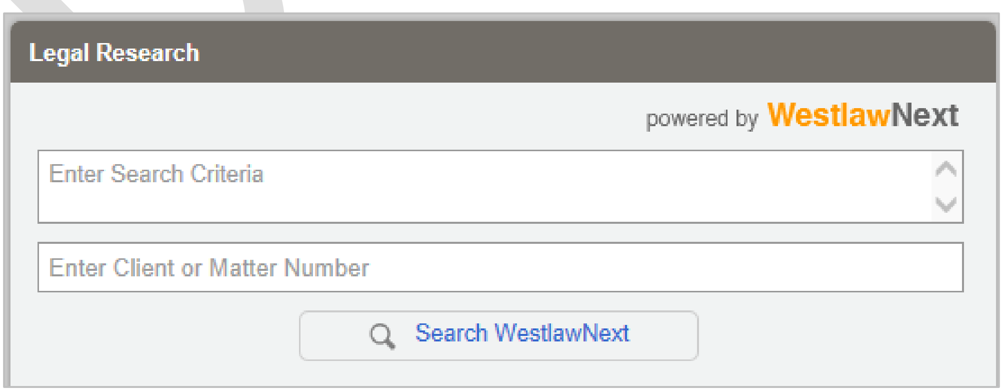
- **3E** – Selecting a 3E task will launch 3E in an iFrame within Workspace. You can perform the desired actions for the 3E process and then select the **Close** button to exit the 3E iFrame.
- **MatterSphere** – Selecting a MatterSphere task will launch Microsoft Word and display the user's Command Centre view. The user can navigate within Command Centre to view their tasks and perform any desired actions and then return to Workspace.
- **Exchange** – Selecting an Exchange task will display a menu option to complete the task. Exchange Appointments are presented for informational purposes and cannot be actioned.
- **Time Entries** – clicking on one Submits/Stays it, and hovering the mouse over it exposes the drop-down menu on the right from which a different action may be chosen:
    - Submit/Stay. This posts the Timecard and keeps the user on the same screen instead of opening a page.
    - Pending. Retains the entry's pending status.
    - Cancel
    - Post All
    - Open in 3E. This opens a new window in Workspace with the 3E Home Page. To get back to Workspace, click CLOSE near the upper right-hand area.

LEGAL RESEARCH PANEL

The legal research option opens a new browser window with a direct link to Westlaw Next. Users will be prompted to sign in the first time if the Westlaw Next cookies are not already saved to the PC. Once the cookie is saved to the PC, the login to Westlaw Next will be seamless.

The user is able to enter search text and optionally enter a client or matter number for charge back recording if desired.

Note: *This panel doesn't display on the Elite Mobile iPad app's Overview screen. To access the legal research feature with the app, click* ***WestlawNext*** *on the app's title bar.*



Search Criteria

Type the details to be used in the search.

Client/Matter Number

Type the client or matter number to use with the search.

Search WestlawNext

Click to initiate the search.

***Note**: If your firm uses a Westlaw site other than Westlaw Next (e.g., Westlaw Classic, Westlaw UK, Westlaw AU), the Legal Research panel cannot currently be used. However, you can access your regional Westlaw site by modifying the Westlaw action link on the Add menu, accessed from the Root navigation bar. See the Elite Integration Framework 2016.2 Designer Guide* (KB article # 139375) *for more information.*

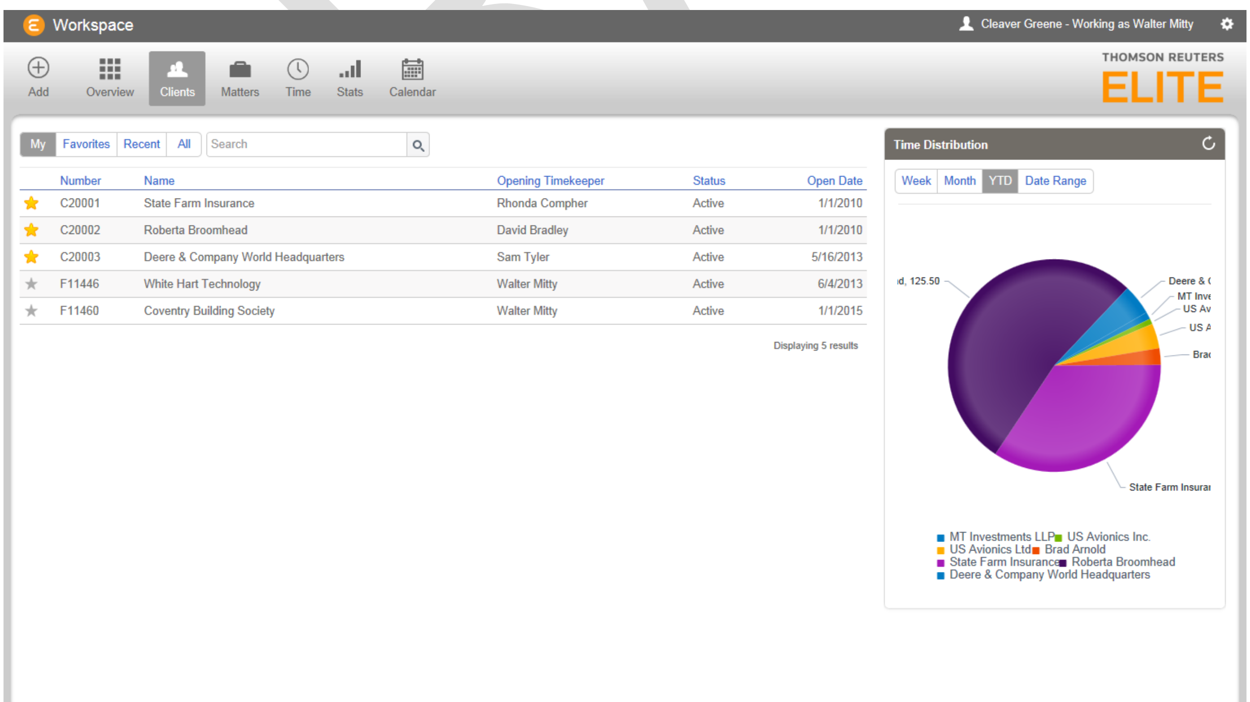
CLIENTS FIELD DEFINITIONS

All Workspace configurations (e.g., 3E-Only, 3E/MatterSphere/BDP, 3E/BDP or 3E/MatterSphere), except for BDP-Only, offer a Clients Navigation button and subsequent views. The differences across the configurations are dependent upon the available data.

CLIENTS LIST

When the Clients option is selected and/or displayed, the screen presented is a listing with filter options and a search.

For the 3E/MS, and 3E-Only configurations, the source of the Clients list data is 3E. For the MatterSphere-Only configurations, MatterSphere is the data source. (No clients in BDP-Only configuration).



For the 3E & MatterSphere and 3E/MatterSphere/BDP configurations, it is assumed that both systems have the same client records and they are mapped to each other in the configuration program.

Filters

Click the filter buttons to narrow the number or records displayed in the client list.

The filters provide the following functionality:

- **My** – filters the list of clients to those clients where the current user is a listed timekeeper.
- **Favorites** – filters the list of clients to those clients previously marked as a favorite by the user. Favorites are marked by clicking the star icon on the list view or within a detail screen.
- **Recent** – filters the list of clients to those the user has recently viewed.
- **All** – actually provides no filter and presents all clients to the user.

Search

Type text in this field to search within the current list. You can enter part or all of the client name or any value within the list (e.g., timekeeper name, number, status, open date), results are filtered automatically.

This field uses type-ahead technology to auto-complete the words being typed. If a record is not found, click the **Search** button to execute the server search.

List

In the list, click a client to drill-down. On the next page, use the blue links on the left for the selected record to view detail information.

- Details, Team, Related Parties, etc.
- ***Save****: Depending on your configuration and permissions, you may be able to edit the information displayed on the Details screen.*
- ***Editing Details in Elite Mobile:*** *Click to save any edits made when using the Workspace website. Milestones*

For the 3E & MatterSphere, 3E/MatterSphere/BDP, and 3E-Only configurations, the columns displayed in the Clients list and the search results are dependent upon the query results as defined in 3E for the Client Maintenance process. If the server search is not returning expected values, check with the 3E administrator to review the 3E query and query results settings.

For the MatterSphere-Only configuration, the columns displayed and the server results are dependent upon the wLCLLISTVIEW made available to the MatterSphere API.

Note*: Click a column header to sort the list in ascending or descending order.*

Load More Results

Click this button in the bottom left corner of the page through a long list or search results. All lists and search results are set to a display 20 items per page by default to reduce system performance issues. The default paging amount can be changed using the Designer configuration program and is a system-wide setting (i.e., the same for all users).

Time Distribution Panel

This chart will provide a graphical representation displaying the clients against whom the user has entered time for the week, month of year to date. Week, Month and YTD (year to date) options. This chart displays for 3E & MatterSphere, and 3E/MatterSphere/BDP and 3E-Only configurations.

Note*: When the web browser is not fully expanded or the Workspace site is accessed on a device with a small screen, the Time Distribution panel does not display by default. Click the* ***Menu*** *icon above the list to toggle the panel open and closed.*

CLIENT DETAIL VIEW

Once a client is selected, the Details view displays. The detail screen includes additional details about the selected client, additional data tabs, buttons and panels.

Recent Clients

Click to display a list of recently viewed clients for quick access. Select the down arrow to view and select a recently viewed client and to go directly to that record.

Favorite

Click the star to mark/unmarked the current client as a favorite. The selection adds or removes it from the Favorites filter list described above. The client detailed view page has a star as well in the upper right-hand area of the panel.

Add Time

Click to create a new time entry.

TABS

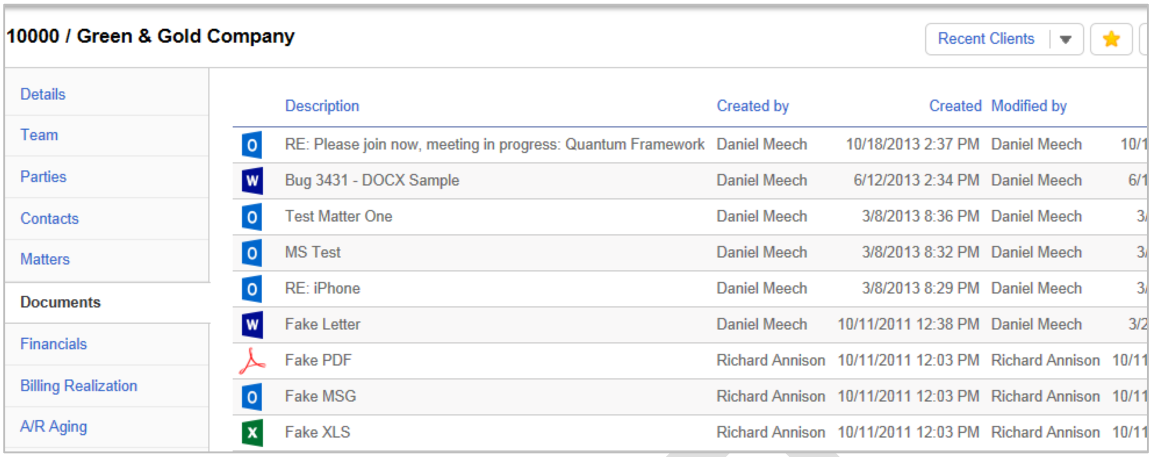
***Note**: The tabs and panels that display vary based on the Workspace configuration. See Appendix A: Client Detail View Tabs & Panels for details. Additionally, the tabs can be grouped as sub-tabs based on customizations made in the Designer.*

The client details tabs and functionality therein is as follows:

- **Details** – displays additional information about the current client. Where 3E is the source, the available fields are from the 3E Client DataObject; where MatterSphere is the source, the available fields are from the MatterSphere API client object.

  ***Save**: Depending on your configuration and permissions, you may be able to edit the information displayed on this screen.*

- ***Editing in Elite Mobile:** Click to save any edits made when using the Workspace website.*
- **Team** – displays the current 3E effective dated timekeepers and unique timekeepers that have entered time for any of the client's matters. A timekeeper will only be listed once in the list. Additional details can be viewed by selecting any timekeeper row. Additional timekeeper data can be viewed by selecting a timekeeper. The data presented on the additional detail screen is from the 3E Timekeeper DataObject.
- **Related Parties** – displays the related parties currently linked to the client via the 3E Related Party Links process.
- **Contacts** – displays the associates currently linked to the client in MatterSphere. Additional details can be viewed by selecting any contact row.
- **Matters** – displays a list of the matters for the current client. Users can go directly to a matter record by selecting it from the list.
- **Documents** – displays a list documents linked directly to the client. Documents will be available depending upon the document management system (DMS) in use. Workspace currently integrates with the MatterSphere and Autonomy iManage document management systems.



Users may select a document to view it in PDF format within Workspace. Users will only be able to view documents to which they have access.

- **Financials** – displays financial statistics for the current client including worked and billed hours and costs, write-offs, WIP and A/R for the current month, year to date (YTD) and prior year to date.

Category	Currency	Current Month Hours	Current Month Fees	YTD Hours	YTD Fees	Prior YTD Hours	Prior YTD Fees
Worked	CAD	0.00	$0.00	0.00	$0.00	0.00	$0.00
Worked	USD	0.00	$0.00	5.00	$1,625.00	594.20	$277,506.05
Billed	CAD	0.00	$0.00	0.00	$0.00	0.00	$0.00
Billed	USD	0.00	$0.00	0.00	$0.00	343.80	$184,251.05
Received	CAD	0.00	$0.00	0.00	$0.00	0.00	$0.00
Received	USD	0.00	$0.00	0.00	$0.00	276.25	$112,543.50
Write-offs	CAD		$0.00		$0.00		$0.00
Write-offs	USD		$0.00		$0.00		$0.00
Costs Worked	CAD		$0.00		$0.00		$0.00

To view additional detail, users can click anywhere in the table to drill into the data. Upon selection, the 3E Client Inquiry dashboard will be displayed for the current client.

- **Billing Realization** – displays worked vs billed realization for the current client. The default view is a bar chart. To view in a table view, select the Table button. To view additional detail, users can click on a bar in the chart or anywhere in the table to drill into the data. Upon selection, the 3E Client Inquiry dashboard will be displayed for the current client.

  ***Note**: Use the **Start Date** and **End Date** fields to filter the data displayed in the chart to a specified period. The default date range is the current month. The chart and table data will recalculate automatically when the dates change.*

- **A/R Aging** – displays current Accounts Receivable (A/R) for the current client. The aging buckets displayed are reflected by those currently set within 3E for your firm. The default view is a bar chart. To view in a table view, select the Table button.

To view additional detail, users can click on a bar in the chart or anywhere in the table to drill into the data. Upon selection, the 3E Aged AR – Client Detail metric will be displayed.

Users can also view the invoices reflected in the chart/table by selecting the Invoices button.

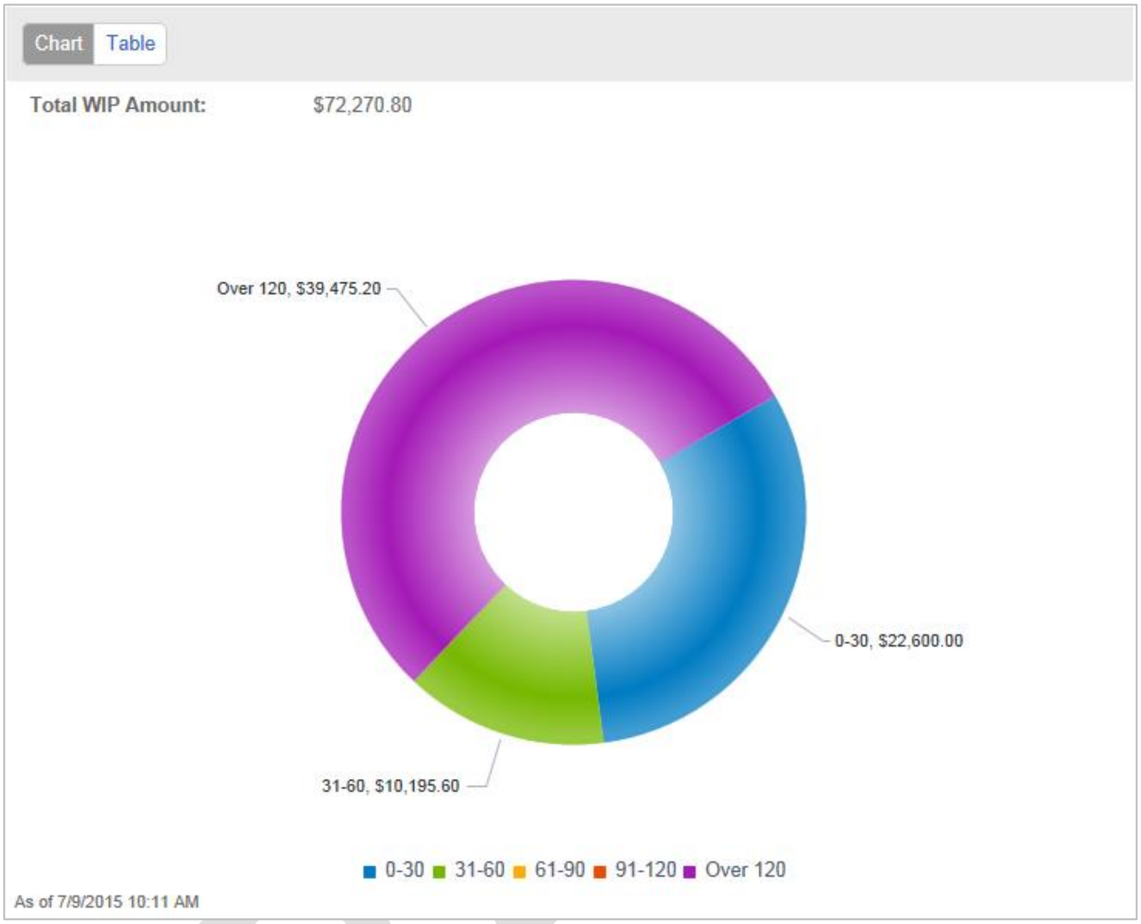
Only those invoices generated and attached to the invoice record in 3E will be displayed in the list.

Chart | Table | Invoices

Aging	Amount	Invoice Date	Invoice	Client	Matter	Name
Over 120	$75,000	1/31/2013	65308	Yellow Pad Inc.	10001-0002	Desmond Clarke Litigation
31-60	$19,615	4/30/2013	65220	Yellow Pad Inc.	10001-0001	Purchase of 123 High Street, Anytown
0-30	$11,350	6/14/2013	65300	Yellow Pad Inc.	10001-0002	Desmond Clarke Litigation

To view a PDF of the actual invoice, click on the desired row or select View Invoice from the hover menu.

- **WIP Aging** – displays current Work in Progress (WIP) for the current client. The aging buckets displayed are reflected by those currently set within 3E for your firm. The default view is a donut chart. To view in a table view, select the Table button.



To view additional detail, users can click on a chart segment in the chart or anywhere in the table to drill into the data. Upon selection, the 3E Aged WIP – Client Detail metric will be displayed.

PANELS

The following panels display in the detail view for the Workspace Web configurations.

- **Tasks Panel**: The Tasks panel will display 3E tasks (i.e., Action List items) specifically related to the current client (if any). MatterSphere tasks are not displayed. As with Tasks on the Overview screen, the Tasks on the client screen are actionable. The user may either click on the task itself or select an option from the hover menu. The available actions will be dependent upon those from the source system. 3E tasks will be displayed with available 3E output options. Selecting the 3E task will launch 3E within an iFrame within Workspace to the 3E process page.
- **Legal Research panel**: The Legal Research panel presents a direct link to Westlaw Next. The current client value is defaulted to the form and the user only needs to enter the desired search text. Users will be prompted to sign in the first time if the Westlaw Next cookies are not already saved to the PC. Once the cookie is saved to the PC, the login to Westlaw Next will be seamless.

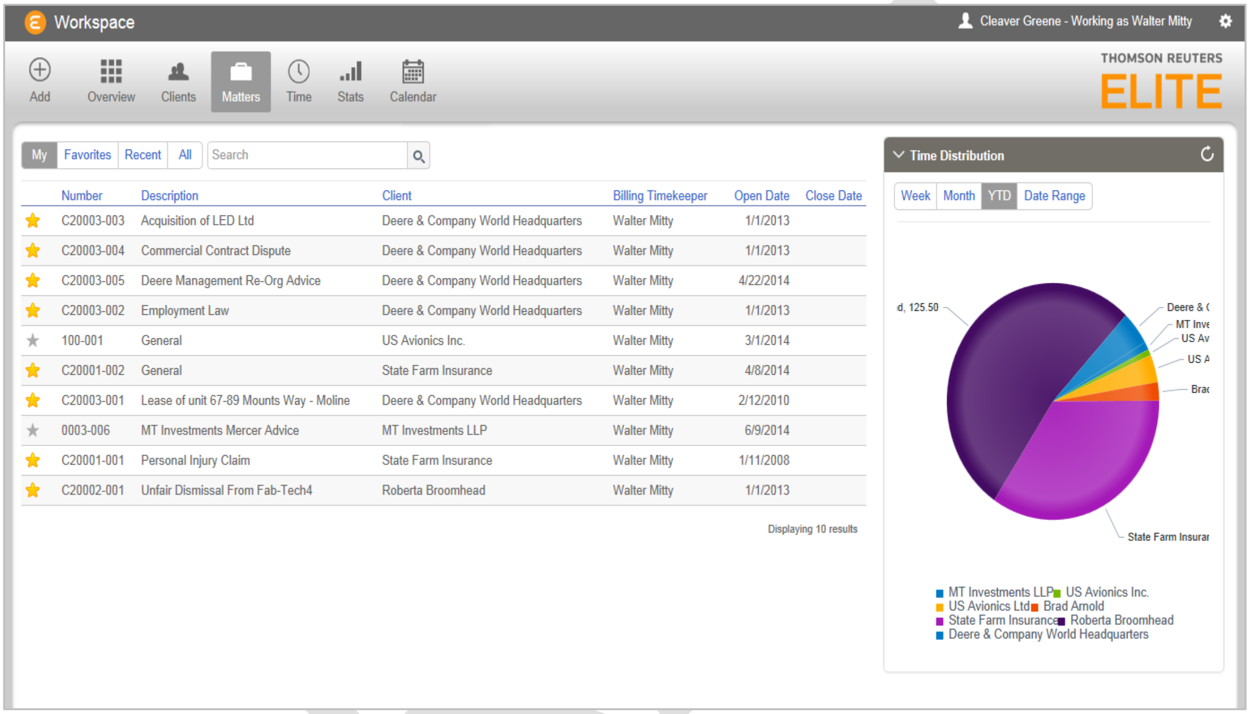
  Note*: If your firm uses a Westlaw site other than Westlaw Next (e.g., Westlaw Classic, Westlaw UK, Westlaw AU), the Legal Research panel cannot currently be used. However, you can access your regional Westlaw site by modifying the Westlaw link the Action menu accessed from the Add button on the Root navigation bar. See the Elite Integration Framework 2016.2 Designer Guide (KB article #* 139375*) for more information.*

MATTERS FIELD DEFINITIONS

All configurations (e.g., 3E-Only, 3E/MatterSphere/BDP, 3E/BDP or 3E/MatterSphere), except for BDP-Only, offer a Matters Navigation bar option and related views within. The differences across the configurations are dependent upon the available data.

MATTERS LIST

When the Matters option is selected and/or displayed, the screen presented is a listing with filter options and a search.



For the 3E/MatterSphere, 3E/MatterSphere/BDP, 3E/BDP and 3E-Only configurations, the source of the Matters list data is 3E. For the MatterSphere-Only configurations, MatterSphere is the data source.

For the 3E & MatterSphere and the 3E/MatterSphere/BDP configurations, it is assumed that both systems have the same matter records and they are mapped to each other in the configuration program.

Filters

Click the filter buttons to narrow the number or records displayed in the client list.

The filters provide the following functionality:

- **My** – filters the list of matters to those where the current user is a listed timekeeper.
- **Favorites** – filters the list of matters to those previously marked as a favorite by the user. Favorites are marked by clicking the star icon on the list view or within a detail screen.
- **Recent** – filters the list of matters to those the user has recently viewed.
- **All** – actually provides no filter and presents all matters to the user.

Search

Type text in this field to search within the current list. You can enter part or all of the matter name or any value within the list (e.g., timekeeper name, number, status, open date) and results will be filtered automatically.

This field uses type-ahead technology to auto-complete the words being typed. If a record is not found, click the **Search** button to execute the server search.

List

Click a listed client to drill-down and view detail information for the selected record.

For the 3E & MatterSphere, 3E/MatterSphere/BDP, 3E/BDP and 3E-Only configurations, the columns displayed in the Matters list and the search results are dependent upon the query results as defined in 3E for the Matter Maintenance process. If the server search is not returning expected values, check with the 3E administrator to review the 3E query and query results settings.

For the MatterSphere-Only configuration, the columns displayed and the server results are dependent upon the wLFILISTVIEW made available to the MatterSphere API.

Note*: Click a column header to sort the list in ascending or descending order.*

Load More Results

Click this button to page through a long list or search results. All lists and search results are set to a display 20 items per page by default to reduce system performance issues. The default paging amount can be changed using the Designer configuration program and is a system-wide setting (i.e., the same for all users).

Time Distribution Chart

For the 3E/MatterSphere, 3E/MatterSphere/BDP, and 3E-Only configurations, the Matters list view also includes a Time Distribution chart with Week, Month and YTD (year to date) options. This chart will provide a graphical representation displaying the clients against whom the user has entered time for the selected filter.

To view additional details, the user can select anywhere in the chart to drill into the data. Upon selection, the 3E Timekeeper Time Worked Detail metric will be displayed.

Note*: When the web browser is not fully expanded or the Workspace site is accessed on a device with a small screen, the Time Distribution panel does not display by default. Click the* ***Menu*** *icon above the list to toggle the panel open and closed.*

MATTER DETAIL VIEW

Once a matter is selected, the Details view displays. The detail screen includes additional details about the selected client, additional data tabs, buttons and panels.

Recent Matters

Click the down arrow to view a list of recently viewed matters. Click a listed record to open it.

Favorite

Click to mark or unmark the current matter as a favorite. The selection adds or removes it from the Favorites filter list described above.

Add Time

Click to create a new time entry. The current matter and date will be defaulted to the time entry form.

TABS

Note*: The tabs and panels that display vary based on the Workspace configuration. See [Matter Detail View Tabs and Panels](#) for details. Additionally, the tabs can be grouped as sub- tabs based on customizations made in the Designer*

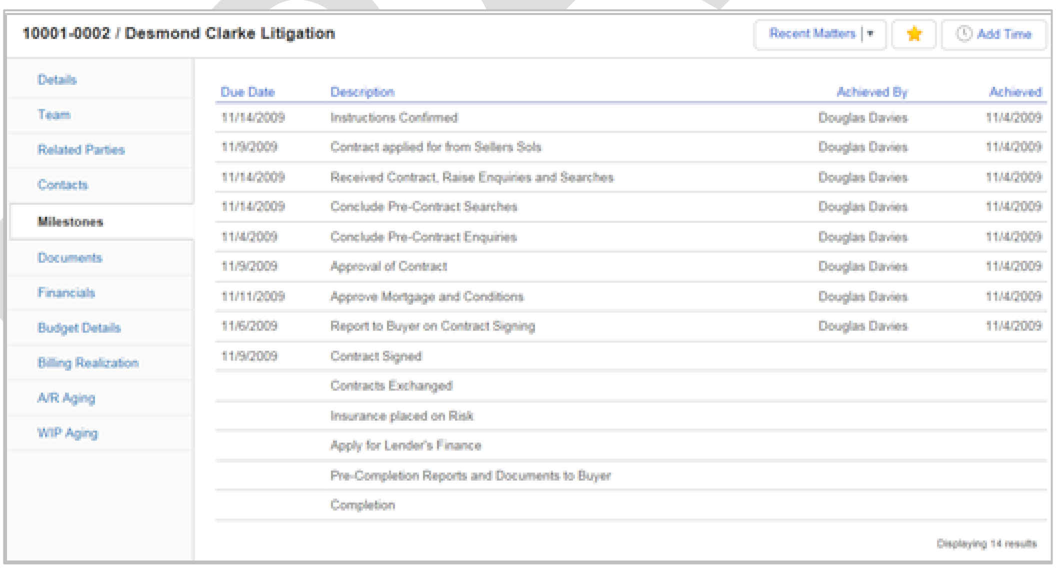
The matter details tabs and functionality are as follows:

- **Details** – displays additional information about the current matter. Where 3E is the source, the available fields are from the 3E Matter DataObject; where MatterSphere is the source, the available fields are from the MatterSphere API matter object.

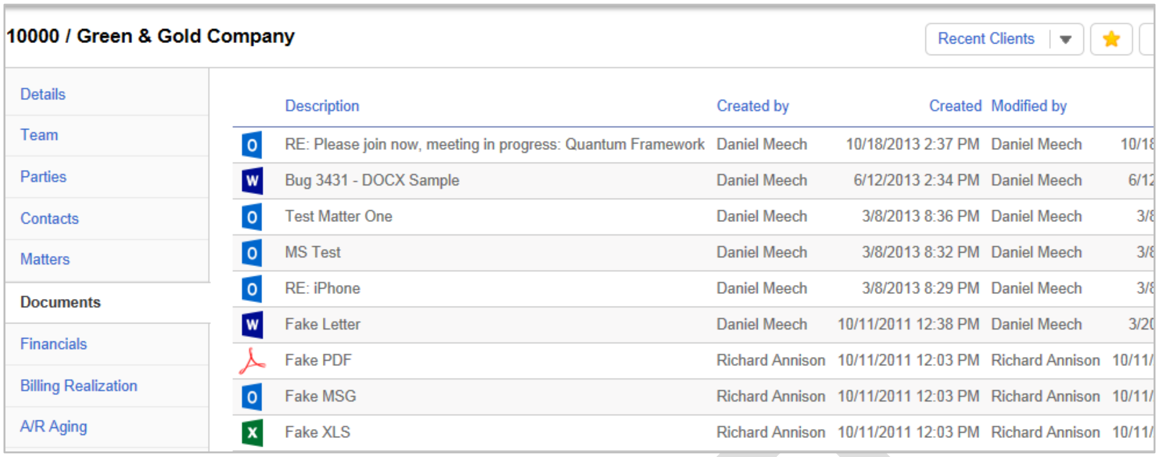
  Save*: Depending on your configuration and permissions, you may be able to edit the information displayed on this screen.*

  Editing in Elite Mobile: Click to save any edits made when using the Workspace website.

- **Team** – displays the current 3E effective dated timekeepers and unique timekeepers that have entered time for any of the current matter. A timekeeper will only be listed once in the list. Additional details can be viewed by selecting any timekeeper row. Additional timekeeper data can be viewed by selecting a timekeeper. The data presented on the additional detail screen is from the 3E Timekeeper DataObject.
- **Related Parties** – displays the related parties currently linked to the matter via the 3E Related Party Links process.
- **Contacts** – displays the associates currently linked to the matter in MatterSphere. Additional details can be viewed by selecting any contact row.
- **Milestones** – this tab displays the MatterSphere milestone plan enabling a user to determine the matter's current stage and action any milestone plans/tasks. The list includes milestone due date, description (i.e., Milestone), achieved by user and achieved date.



- **Documents** – displays a list documents linked directly to the matter. Documents will be available depending upon the document management system (DMS) in use. Workspace currently integrates with the MatterSphere and Autonomy iManage document management systems.



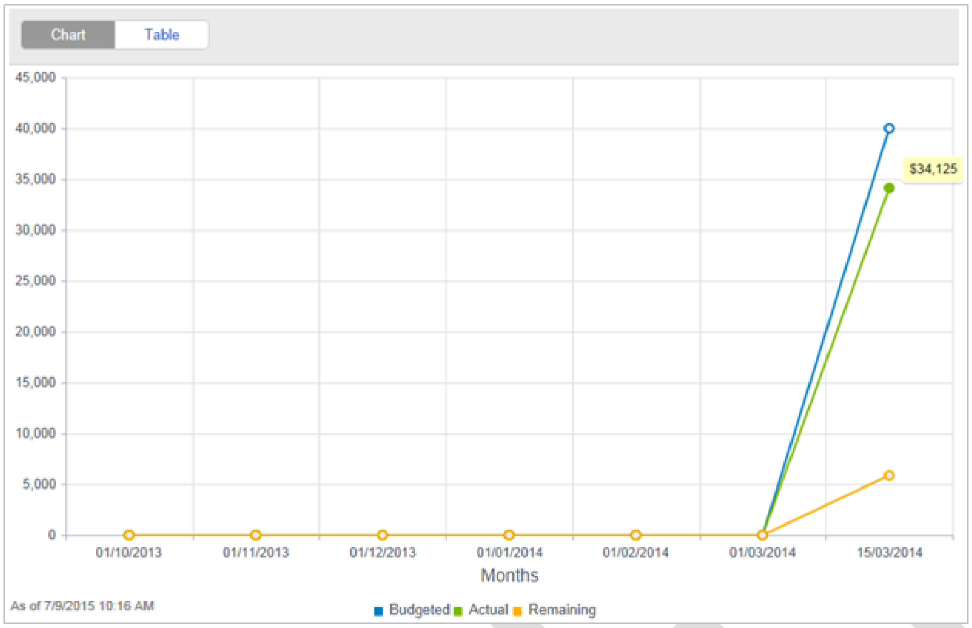
Select a document to view it in PDF format within Workspace. You can only view documents to which you have access.

- **Financials** – displays financial statistics for the current matter including worked and billed hours and costs, write-offs, WIP and A/R for the current month, year to date (YTD) and prior year to date.

Category	Currency	Current Month Hours	Current Month Fees	YTD Hours	YTD Fees	Prior YTD Hours	Prior YTD
Worked	CAD	0.00	$0.00	0.00	$0.00	0.00	
Worked	USD	0.00	$0.00	5.00	$1,625.00	594.20	$277,5
Billed	CAD	0.00	$0.00	0.00	$0.00	0.00	
Billed	USD	0.00	$0.00	0.00	$0.00	343.80	$184,2
Received	CAD	0.00	$0.00	0.00	$0.00	0.00	
Received	USD	0.00	$0.00	0.00	$0.00	276.25	$112,5
Write-offs	CAD		$0.00		$0.00		
Write-offs	USD		$0.00		$0.00		
Costs Worked	CAD		$0.00		$0.00		

To view additional detail, users can click anywhere in the table to drill into the data. Upon selection, the 3E Matter Inquiry dashboard will be displayed for the current matter.

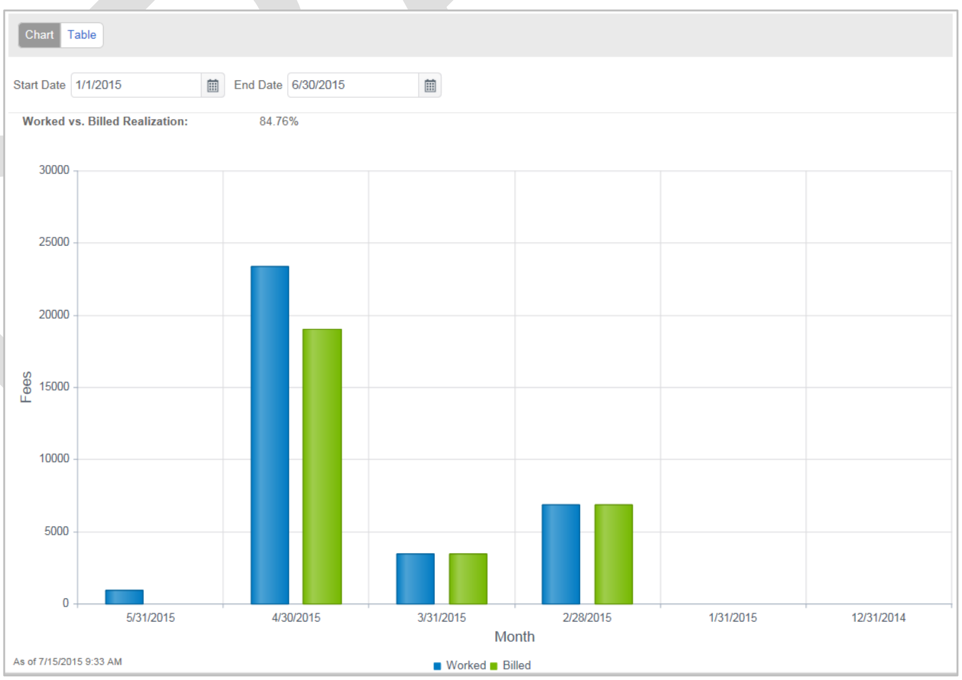
- **Budget Details** – displays a line chart showing budgeted, actual and remaining fees for the current matter.



To view additional detail, users can click any data point in the chart to drill into the data. Upon selection, the 3E Matter Budgets metric will be displayed.

***Note**: Use the **Start Date** and **End Date** fields to filter the data displayed in the chart to a specified period. The default date range is the current month. The chart and table data will recalculate automatically when the dates change.*

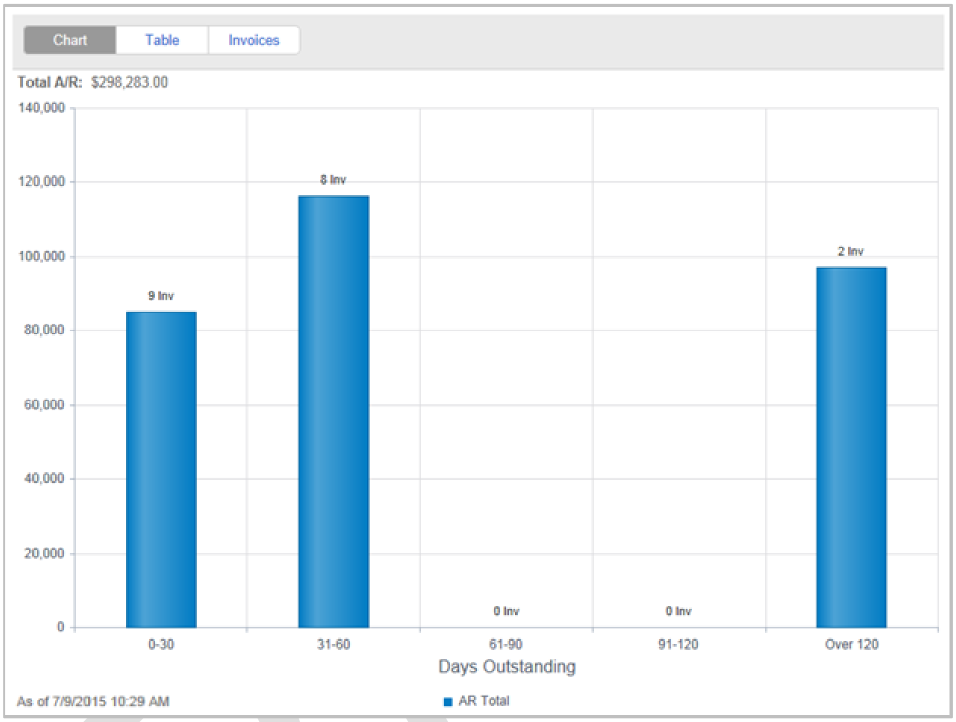
- **Billing Realization** – displays worked vs billed realization for the current matter. The default view is a bar chart. To view in a table view, select the Table button. To view additional detail, users can click on a bar in the chart or anywhere in the table to drill into the data.



Upon selection, the 3E Matter Inquiry dashboard will be displayed for the current matter.

***Note**: Use the **Start Date** and **End Date** fields to filter the data displayed in the chart to a specified period. The default date range is the current month. The chart and table data will recalculate automatically when the dates change.*

- **A/R Aging** – displays current Accounts Receivable (A/R) for the current matter. The aging buckets displayed are reflected by those currently set within 3E for your firm. The default view is a bar chart. To view in a table view, select the Table button.



To view additional detail, click on a bar in the chart or anywhere in the table to drill into the data. Upon selection, the 3E Aged AR – Client Detail metric will be displayed.

You can also view the invoices reflected in the chart/table by selecting the Invoices button. Only those invoices generated and attached to the invoice record in 3E are displayed in the list.

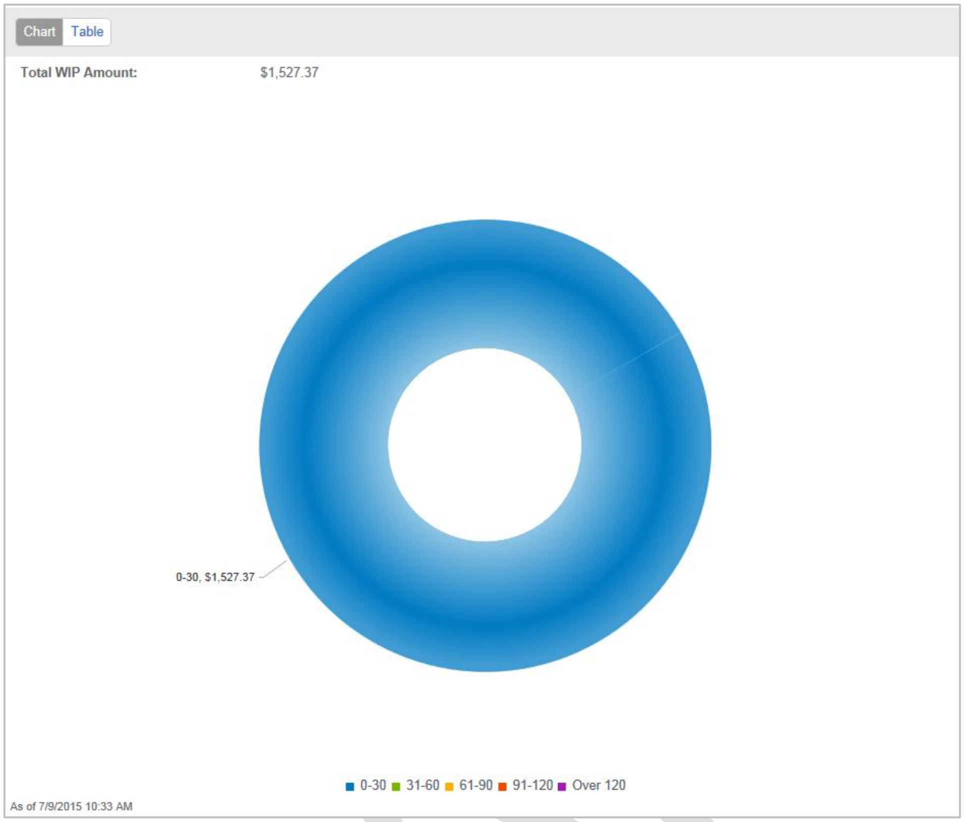
Aging	Amount	Invoice Date	Invoice	Client	Matter	Name
Over 120	$75,000	1/31/2013	65308	Yellow Pad Inc.	10001-0002	Desmond Clarke Litigation
0-30	$11,350	6/14/2013	65300	Yellow Pad Inc.	10001-0002	Desmond Clarke Litigation

To view a PDF of the actual invoice, click a row or select **View Invoice** from the hover menu.

WIP Aging – displays current Work in Progress (WIP) for the current matter. The aging buckets displayed are reflected by those currently set within 3E for your firm. The default view is a donut chart. To view in a table view, select the Table button.

To view additional detail, click a segment in the chart or anywhere in the table to drill into the data. Upon selection, the 3E Aged WIP – Client Detail metric displays.

***Note**: Click the colored box in a chart or graph's legend to filter the displayed information.*



PANELS

Panels are also displayed in the detail view for the Workspace Web configurations.

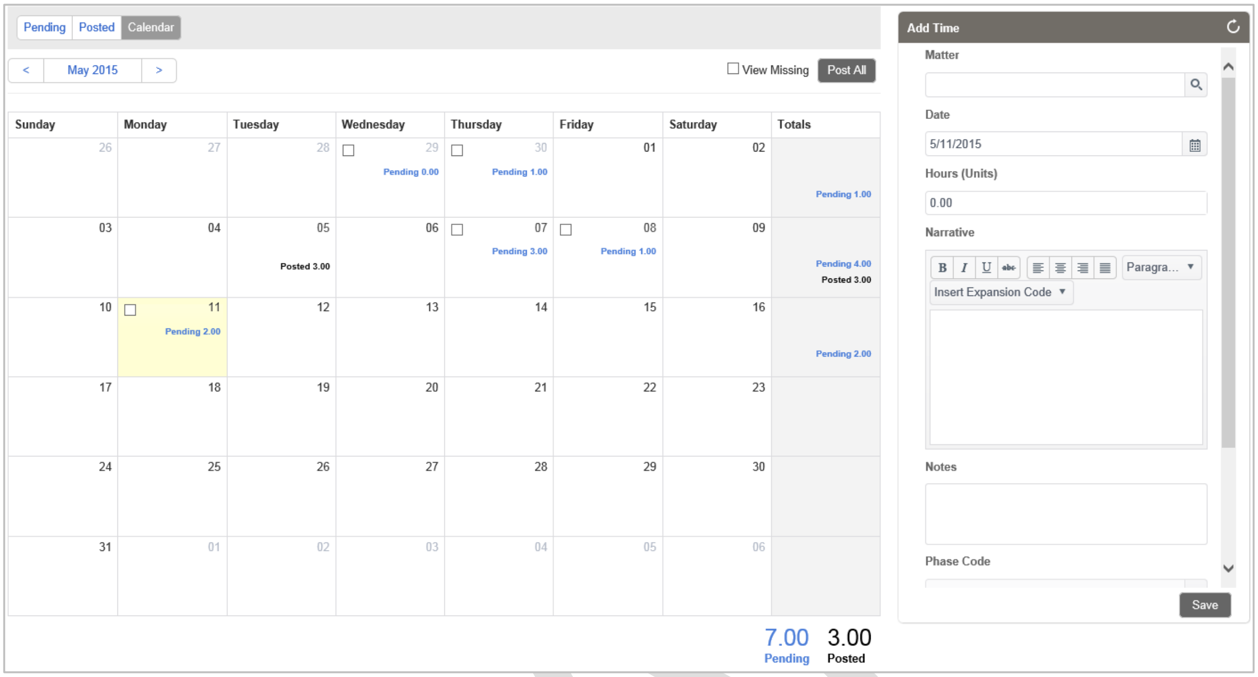
The following panels are not available in Elite Mobile.

- **Tasks Panel:** The Tasks panel will display 3E tasks (i.e., Action List items) specifically related to the current matter (if any) and MatterSphere tasks related to the current matter. As with Tasks on the Overview screen, the Tasks on the matter screen are actionable. The user may either click on the task itself or select an option from the hover menu. The available actions will be dependent upon those from the source system. 3E tasks will be displayed with available 3E output options and can be selected directly to launch 3E to the specific 3E process page for the task. MatterSphere tasks can be selected to launch Microsoft Word and display the user's Command Centre within MatterSphere. Tasks from Exchange are not displayed.
- **Legal Research:** The Legal Research panel presents a direct link to Westlaw Next. The current matter value is defaulted to the form and the user only needs to enter the desired search text. Users will be prompted to sign in the first time if the Westlaw Next cookies are not already saved to the PC. Once the cookie is saved to the PC, the login to Westlaw Next will be seamless.

***Note**: If your firm uses a Westlaw site other than Westlaw Next (e.g., Westlaw Classic, Westlaw UK, Westlaw AU), the Legal Research panel cannot currently be used. However, you can access your regional Westlaw site by modifying the Westlaw action link on the Add menu, accessed from the Root navigation bar. See the Elite Integration Framework 2016.2 Designer Guide (KB article #139375) for more information.*

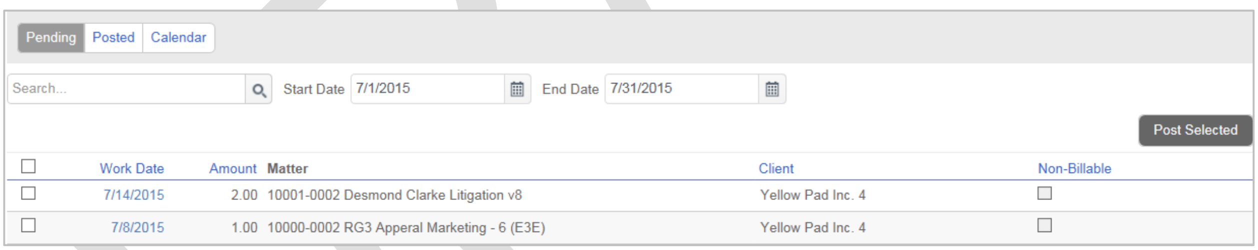
TIME (WEBSITE) FIELD DEFINITIONS

Workspace provides a native time option that is available from the Navigation bar and the Client and Matter Detail views.



PENDING LIST

This lists time entries that have not been posted yet.



The time entry form presents the following fields and functions:

Search

Type search criteria to be used to narrow the list of displayed pending post.

Start/End Date

Select dates from these fields to display pending entries for a specified period.

Post Selected

Click this button to post any listed entry with a selected check box in the first column of the row.

Pending Entries List

> **Select**
>
> Select this check box to flag a time entry for posting.

Work Date

Displays the date on which the work recorded on the time entry was done.

Amount

Displays the number of hours or units being recorded.

Matter

Displays the matter number and name.

Client

Displays the client name.

Non-Billable

If marked, this check box specifies an entry as non-billable.

Clone/Post Action Menu

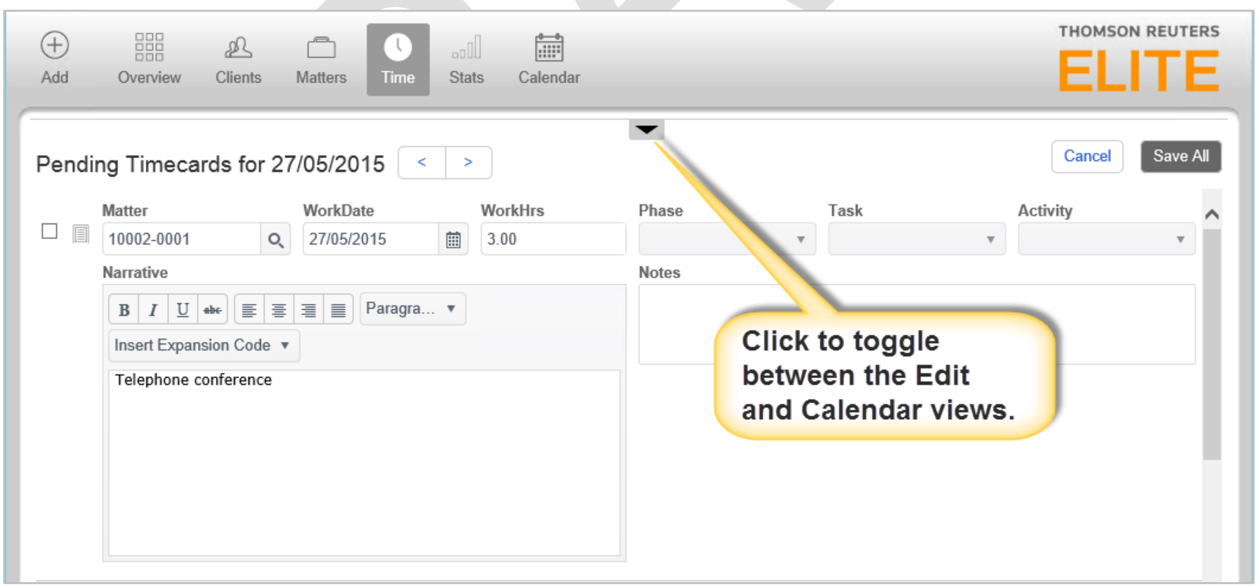
Hovering the mouse over a listed entry to access the Action menu. You can select to clone or post the pending entry.

***Note**: To view or edit a listed entry, click anywhere on the row. After making your changes, click **Save** to return to the previous screen.*

PENDING TIME ENTRY MULTI-EDIT VIEW

Pending time entries can now be edited in Workspace using the new Multi-edit list in the Time Entry Calendar view.

To return to the Calendar view from the Multi-edit list, click **Cancel** or click the down arrow at the top-center of the pending time entries list.



Previous/Next Day

Navigate from date to date within the multi-edit list by selecting the **Previous** or **Next** arrows adjacent to the displayed Pending Timecards for date at the top of the list. The navigation will go to the previous or next day with a time entry, which may or may not be the immediate previous or next day.

Save All/Save Selected

Click **Save All** to save modifications to all listed pending entries for the selected day. Click **Save Selected** to only save changed to pending entries for which the Select check box has been selected.

Select

Select this check box to flag specific pending time entry for saving.

For details on the time entry specific fields, see Add Time Field Definitions for more information.

Clone

Click the button, adjacent to the **Select** check box, to clone the existing time entry for a new entry. The duplicate will be added to the end of the list.

POSTED LIST

This view displays a list of posted time entries. You can sort this list by clicking column headers. Additionally, the list displays an entries billable status.

Search

Type text in this field to enter search criteria to narrow the list of displayed entries.

Start/End Date

Type or select dates to narrow the list of displayed time entries based on the time period in which they were created.

Posted Entries List

Work Date

Displays the date of the work date or time entry.

Amount

Displays the number of hours or units being recorded.

Matter

Displays the matter number and name.

Client

Displays the client name.

Non-Billable

If marked, this check box specifies an entry as non-billable.

Note*: To view a listed entry, click anywhere on the row.*

CALENDAR VIEW

The Calendar view displays by default when selecting Time Entry from the Navigation bar. This view shows the current month in a six-week total view. The calendar displays a user's pending and posted totals within individual days. Pending and posted totals are also displayed for the week in the **Totals** column and for the entire month, with totals listed at the bottom of the screen. Users can also view missing time totals for the day, week and month.

Previous/Next Month

Use these arrows to navigate between months.

Add Time

Click this button to access the Time Entry form to record time worked.

View Missing

Select this check box to view missing time totals for the day, week and month. Daily, weekly or monthly Missing Time totals can be set in 3E.

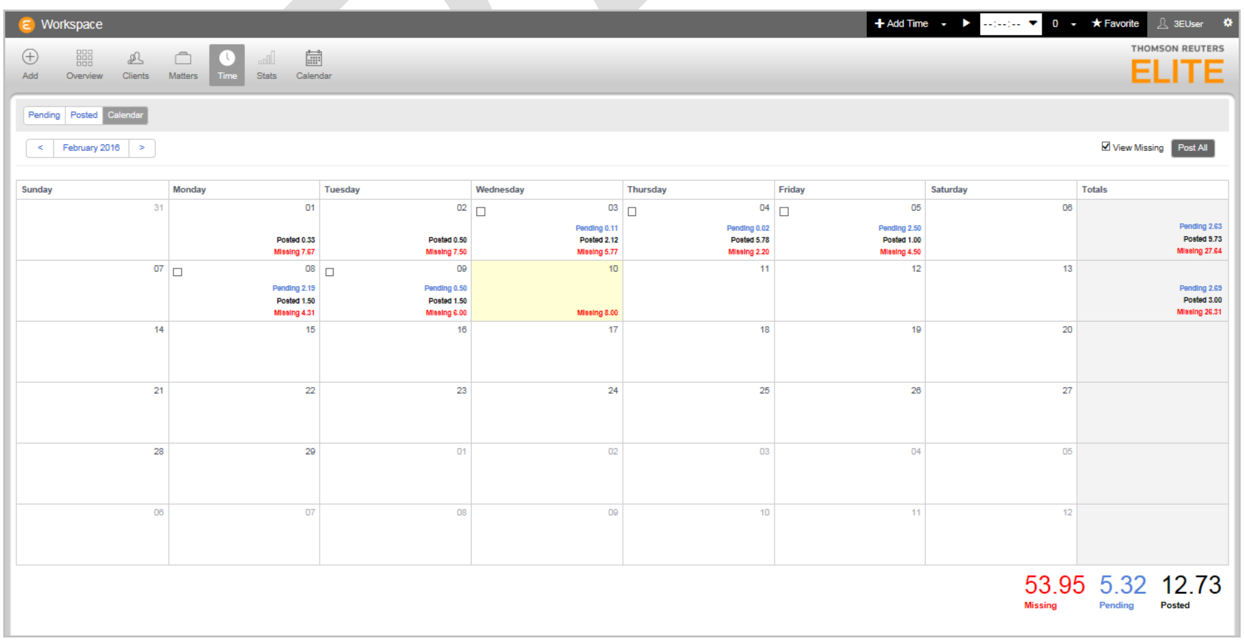
Note*: This check box can be hidden using the EIF Designer.*

Post All / Post Selected

- **Post All** – Click to post all pending entries in the calendar.
- **Post Selected** – Click to post pending entries for individual days on which the check box has been selected.

Drill-Downs

Click a value for pending or posted timecards in the calendar for a list of entries for that day. Clicking a pending value opens the Pending Time Entry Multi-edit view.



ADD TIME FORM

The available Time Entry form, fields, and options is dependent upon the Workspace configuration. The 3E/MatterSphere, 3E/MatterSphere/BDP and 3E-Only configuration is linked to 3E time entry functionality, specifically the Time Entry process using the Object TimecardPending. The MatterSphere-Only configuration is linked to MatterSphere time entry functionality, specifically the MatterSphere API time record object.

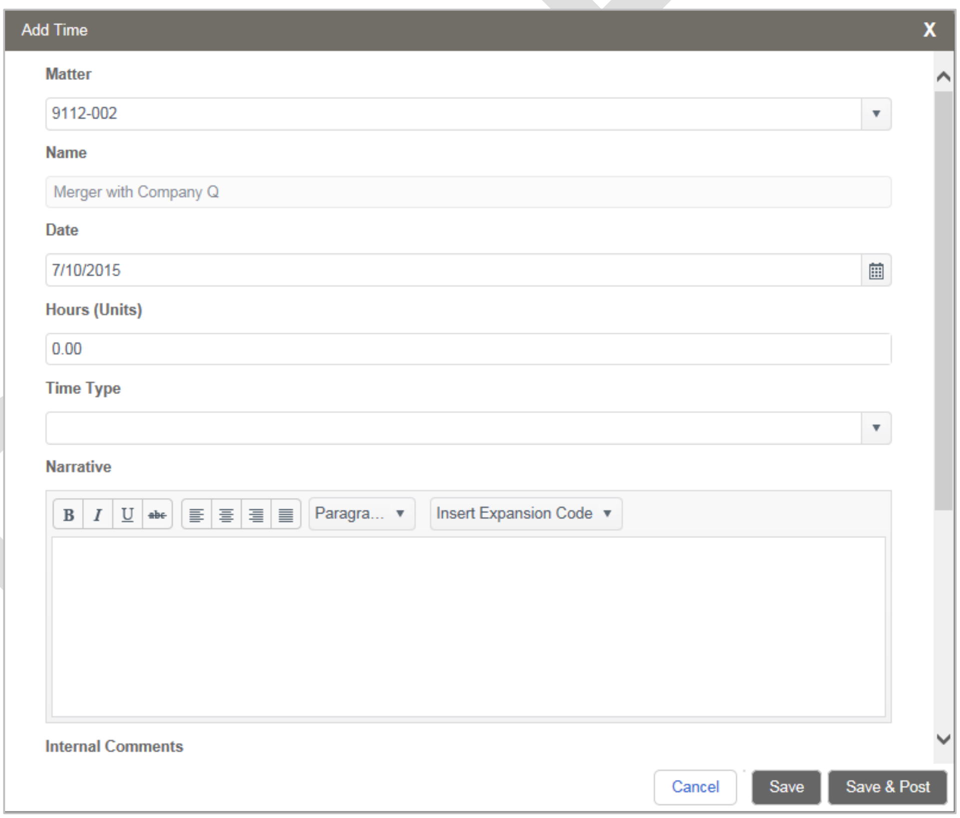
The Add Time form is used to enter time entries. You can access it via the **Time** view or the **Clients** and **Matters** detail views.

Note: *When using the Workspace website, depending on your screen's resolution, the Add Time panel will be collapsed from. It can be toggled open or closed by clicking the* ***Add Time*** *button.*

3E, 3E/MATTERSPHERE, 3E/BDP AND 3E/MATTERSPHERE/BDP CONFIGURATIONS

The following field definitions cover the "out of the box" fields available on both the Add Time pop-up (Client & Matters Detail views) and the Add Time panel (Time view) for 3E/MatterSphere, 3E/MatterSphere/BDP and 3E-Only web configurations.

Note: *The Add Time pop-up form accessed through the Client and Matters details views and the Time screen's Add Time panel are customized separately in the EIF Designer. Because of this, once customizations are made, the options and fields available on the pop-up and panel Add Time forms may vary.*



Note: *The above image is of the Add Time pop-up form accessed from the Client Details and Matter Details views. But the default fields, defined below, also apply to the Add Time panel accessed via the Time view.*

Matter

Type, select from the list or search for a matter. If you accessed the form a Matters Detail record, the current matter is entered automatically.

Date

Type or select an entry date. This field defaults to the current date.

Hours (Units)

Type the number of hours/units for the time entry.

Narrative

Type descriptive detail for the time entry. The narrative field includes a toolbar with basic rich-text formatting features. Expansion codes are available to help you quickly complete a narrative entry. Make a selection from the **Insert Expansion Code** drop-down list on the formatting toolbar to insert a code or manually enter a code, including the brackets (e.g., [BRB]) and hit the space bare.

Note*: Expansion code capability is available to any editable Workspace narrative field and is specific to the 3E-related configurations. This features can be disabled in the EIF Designer.*

Internal Comments

Type any internal comments for the time entry.

Phase Code

Select a phase code if applicable for the entered matter.

Task Code

Select a task code if applicable.

Activity Code

Select a task code if applicable.

Cancel

Click to exit this form without saving the time entry. No data will be saved.

Save

Click to save and create a pending time entry.

Save & Post

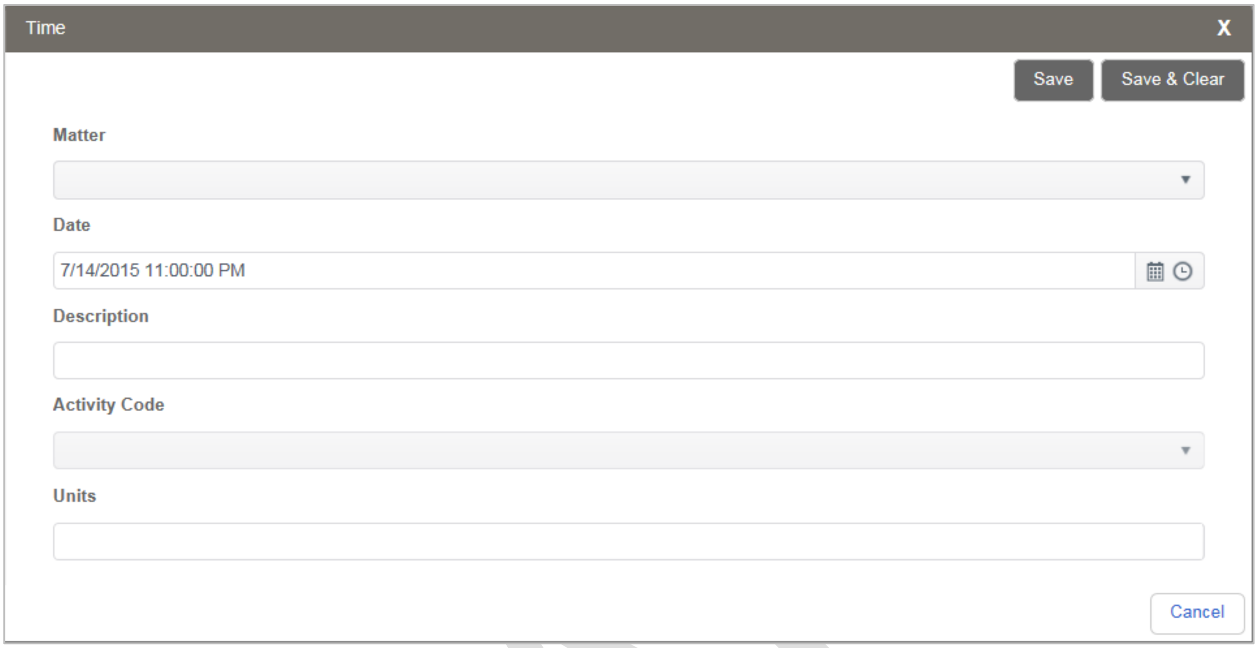
Click to save the time entry. The entry is posted when saved. If there is an exception, it will remain as pending.

Notes*:*

- *As phase, task and activity code values can be affected by effective dated matter information, the phase, task and activity code fields are cleared if the matter or date value is changed.*
- *Workspace currently provides limited field-level business rules and validations except where noted here. Business rules and validations are fully enforced upon save.*
- *Additional fields can be added or existing fields removed via the EIF Designer.*

MATTERSPHERE-ONLY CONFIGURATION

The following information details the options available on the Time Entry form for the MatterSphere-Only web configurations.



Matter

Type, select from the drop-down list or search for the desired matter. The Matter field is a dynamic field in that it provides a drop-down selection (will list all matters), allows direct entry if the matter number is known and allows a search if the matter name or number is unknown or only partially known. For searching, users can enter any part of the matter number or matter name and results will be displayed matching whatever is entered. The search is real-time as the user types – the more that is entered, the less results that will be displayed as the search automatically filters the results.

Date

Type or select a date. The field defaults to the current date.

Description

Type the desired descriptive text for the time entry.

Activity Code

Select a task code if applicable from this drop-down list.

Units

Type the number of units for the time entry.

Cancel

Click this button to exit the form without saving the time entry.

Save

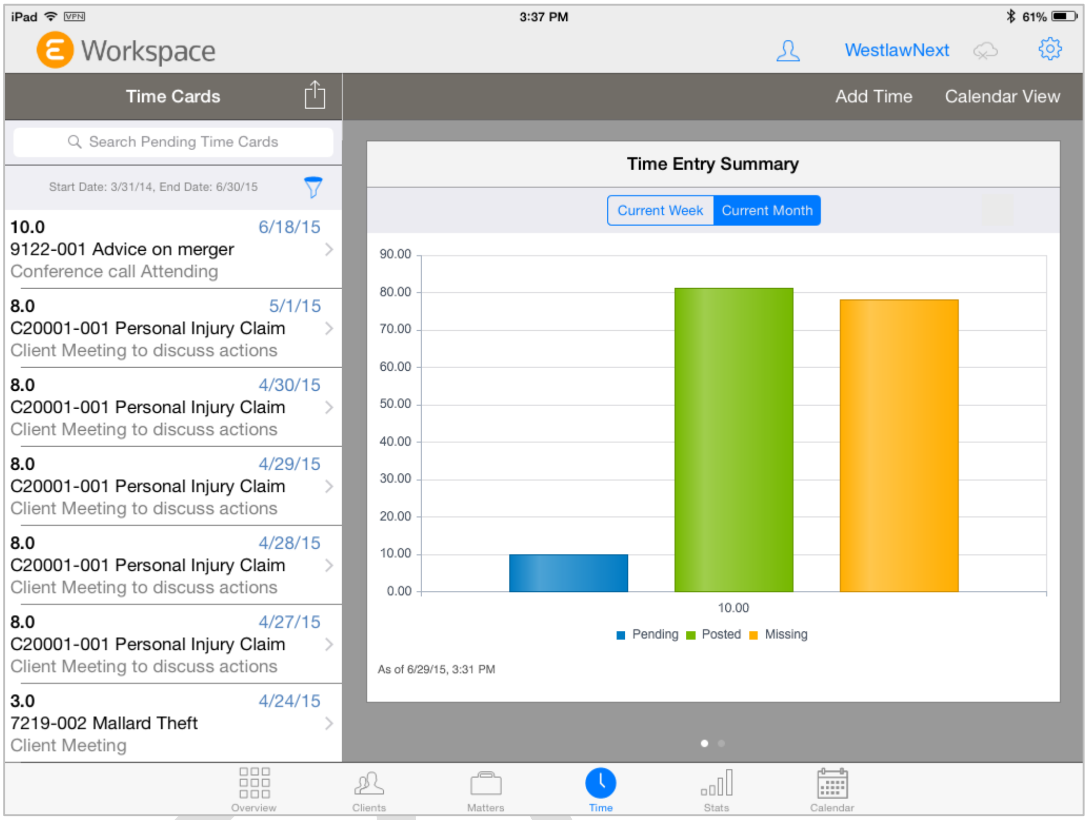
Click to save the time entry. The entry is saved to the dbtimeledger table in MatterSphere.

Save & Clear

Click to save the time entry and reset the screen for another entry.

TIME (ELITE MOBILE) FIELD DEFINITIONS

Workspace provides a native time option that is available from the Navigation bar and the Client and Matter Detail views.



The Time screen presents the following fields and functions:

TIME CARDS PANEL

This list time entries that have not been posted yet.

Action

Tap this button to do one of the following:

- **View Posted** – Select to view posted time entries.
- **Post Selected** – Select to choose pending time entries for posting.

Search

Type search criteria to be used to narrow the list of displayed pending post.

Start/End Date Filter

Select dates from these fields to display pending entries for a specified period.

Pending Entries List

The list displays the number of hours or units being recorded, the client name, entry date, and abbreviation of time card narrative.

Add Time

Tap to access the Time Entry form to create an entry.

Calendar View

Tap view missing, posted, and pending time entries for a selected month.

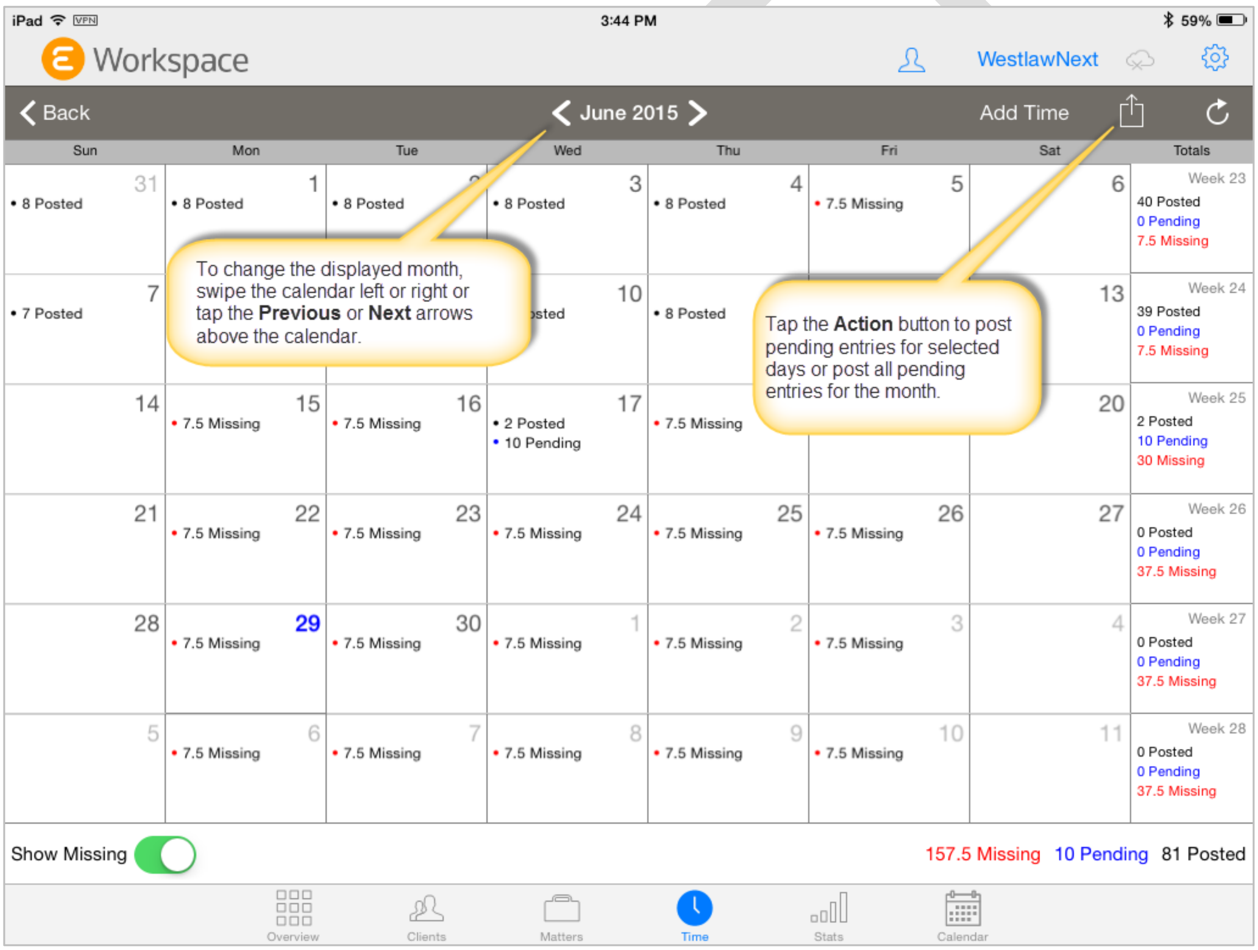
Time Entry Summary & Distribution Charts

These charts display adjacent to the Time Cards panel. Swipe left or right to move between the charts. For details on the charts, see Time Entry Summary tab and the Time Entry Distribution tab in the Stats section.

CALENDAR VIEW

The view is accessed by tapping Calendar View on the Time screen. This view shows a user's pending and posted totals within individual days for a month. The current month is shown by default. Pending and posted totals are also displayed for the week in the **Totals** column and for the entire month, with totals listed at the bottom of the screen. Users can also view missing time totals for the day, week and month.

Note*: The Calendar view is not available on the iPhone.*



Previous/Next Month

Use these arrows to navigate between months.

Add Time

Tap to access the Time Entry form to record time worked.

Action

Tap this button to select an option for posting pending entries directly from the Calendar view in two ways:

- **Post All** – Select this option to post all pending entries in the calendar.
- **Select to Post** – Select this option to post pending entries for one or more selected individual days.

Refresh

Tap to update the Calendar View with the latest time entry details.

Show Missing

Tap this option to view missing time totals for the day, week and month.

Drill-downs

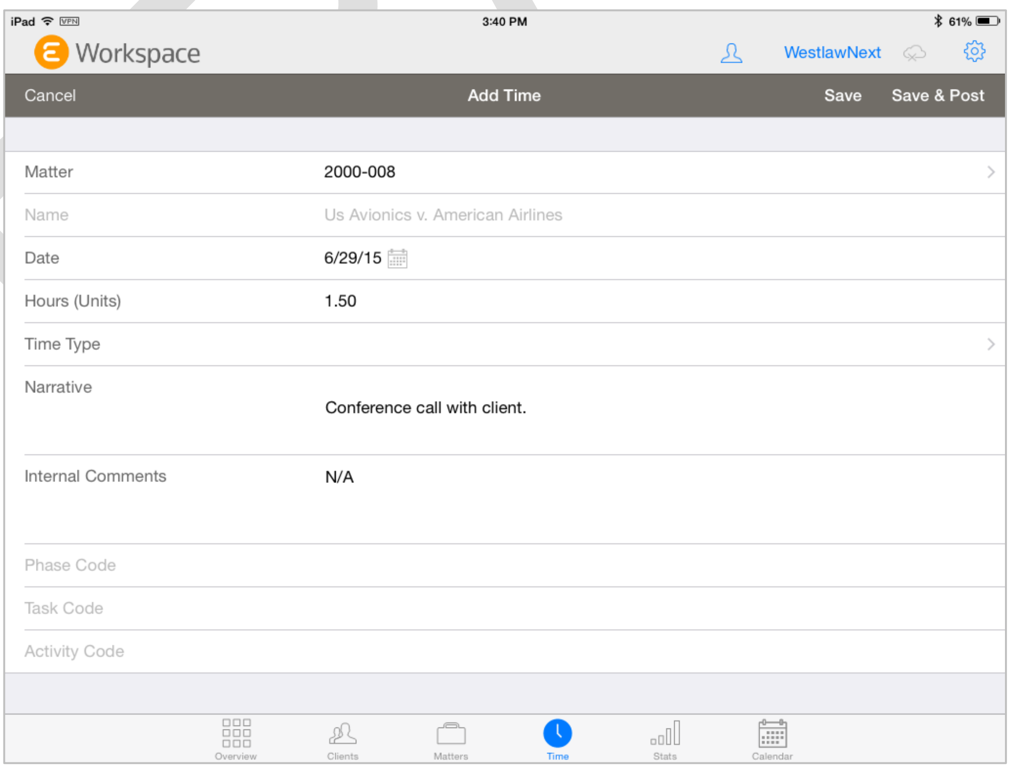
Tap a value for pending or posted timecards in the calendar for a list of entries for that day.

ADD TIME / TIME ENTRY FORM

The Time Entry form and fields within the form will be dependent upon configuration. The 3E/MatterSphere, 3E/MatterSphere/BDP, 3E/BDP and 3E-Only configuration is linked to 3E time entry functionality, specifically the Time Entry process using the Object TimecardPending. The MatterSphere-Only configuration is linked to MatterSphere time entry functionality, specifically the MatterSphere API time record object.

The Add Time form is used to enter time entries. You can access it via the Time Entry view or the Client and Matter detail views. The options available on the form vary by the Workspace configuration.

Note*: The fields available by configuration and that the following screenshots displays fields available with the 3E & MatterSphere*, *3E/BDP and* 3E/MatterSphere/BDP *configurations and 3E-Only web configurations. See* *MatterSphere-Only* *to view the fields available for that configuration.*



The time entry form presents the following fields and functions:

Matter

Type, select from the list or search for the desired matter.

Name

This field displays the matters name.

Date

Type or select an entry date. This field defaults to the current date.

Hours (Units)

Type the number of hours/units for the time entry.

Narrative

Type descriptive detail for the time entry. Expansion codes are available to help you quickly complete a narrative entry. Tap **Enter Expansion Code** on the top of the iOS keyboard to display a list of codes.

Note*: Expansion Code text cannot be manually entered (e.g., typing square bracket-code-square bracket is not available).*

Notes/Internal Comments

Type any internal comments for the time entry.

Phase Code

Select a phase code if applicable for the entered matter.

Task Code

Select a task code if applicable.

Activity Code

Select a task code if applicable.

Notes*:*

- *As phase, task and activity code values can be affected by effective dated matter information, the phase, task and activity code fields are cleared if the matter or date value is changed.*
- *Workspace currently provides limited field-level business rules and validations except where noted here. Business rules and validations are fully enforced upon save.*

Cancel

Tap to exit this form without saving the time entry. No data will be saved.

Clone

Tap this option to create a new time entry based on an existing one. This option is only available after selecting a Timecard for editing.

Save

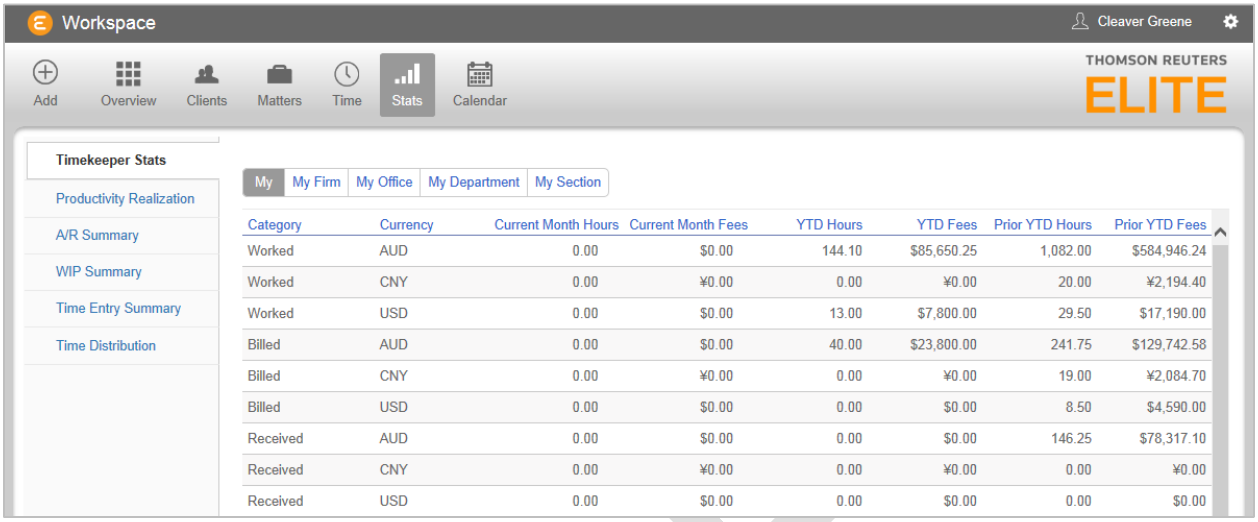
Tap to save the time entry. The entry is posted when saved. If there is an exception, it will remain as pending.

Save & Post

Tap to save the current time entry and post it immediately.

STATS FIELD DEFINITIONS

The 3E & MatterSphere, 3E/MatterSphere/BDP, 3E/BDP and 3E-Only configurations provide additional financial and key performance indicator (KPI) data options with the Stats function.



Category	Currency	Current Month Hours	Current Month Fees	YTD Hours	YTD Fees	Prior YTD Hours	Prior YTD Fees
Worked	AUD	0.00	$0.00	144.10	$85,650.25	1,082.00	$584,946.24
Worked	CNY	0.00	¥0.00	0.00	¥0.00	20.00	¥2,194.40
Worked	USD	0.00	$0.00	13.00	$7,800.00	29.50	$17,190.00
Billed	AUD	0.00	$0.00	40.00	$23,800.00	241.75	$129,742.58
Billed	CNY	0.00	¥0.00	0.00	¥0.00	19.00	¥2,084.70
Billed	USD	0.00	$0.00	0.00	$0.00	8.50	$4,590.00
Received	AUD	0.00	$0.00	0.00	$0.00	146.25	$78,317.10
Received	CNY	0.00	¥0.00	0.00	¥0.00	0.00	¥0.00
Received	USD	0.00	$0.00	0.00	$0.00	0.00	$0.00

PERSONAE

EIF and Workspace provide a persona concept that allows firms to customize the Workspace experience by the roles firm personnel fulfil. The Stats function is where the Workspace persona configurations are applied. While persona configurations are available for all of Workspace, the stock configuration provides for differences only within the Stats functionality.

Four personae are provided – Working Lawyer, Practice Group Lead, Office Managing Partner and Firm Managing Partner. The Working Lawyer persona is the default or baseline configuration. The stock personas are provided for the 3E & MatterSphere, 3E/MatterSphere/BDP and 3E-Only configurations.

Stats provides filters for the chart and table views, and the filters available to the user are dependent upon his/her persona. The filters are available for Timekeeper Stats, Productivity Realization, A/R Summary and WIP Summary.

FILTERS

All Key Performance Indicators (KPIs) default views in Stats are for current users and present them personal information (i.e., “My” information). As noted above, filters are available for the Timekeeper Stats, Productivity Realization, A/R Summary and WIP Summary based on the user’s assigned persona. The filters provide the following functionality:

- **My** – Displays data for the current user for the selected KPI.
- **My Firm** – Displays all data, firm-wide, for the selected KPI.
- **My Office** – Displays data for the user’s assigned 3E office location for the selected KPI.
- **My Department** – Displays data for the user’s assigned 3E department for the selected KPI.
- **My Section** – Displays data for the user’s assigned 3E section for the selected KPI.

The following table outlines the stock personas and the filter options available to each within the Stats functionality.

	My	My Firm	My Office	My Department	My Section
Working Lawyer (default)	X				
Practice Group Lead	X			X	X
Office Managing Partner	X		X	X	X
Firm Managing Partner	X	X	X	X	X

STATS VIEW TABS

The following information provide field definition detail for options available in the Stats view and related tabs.

TIMEKEEPER STATS TAB

Timekeeper Stats displays financial statistics including worked and billed hours and costs, write-offs, Non-billable, WIP and A/R for the current month, year to date (YTD) and prior year to date.

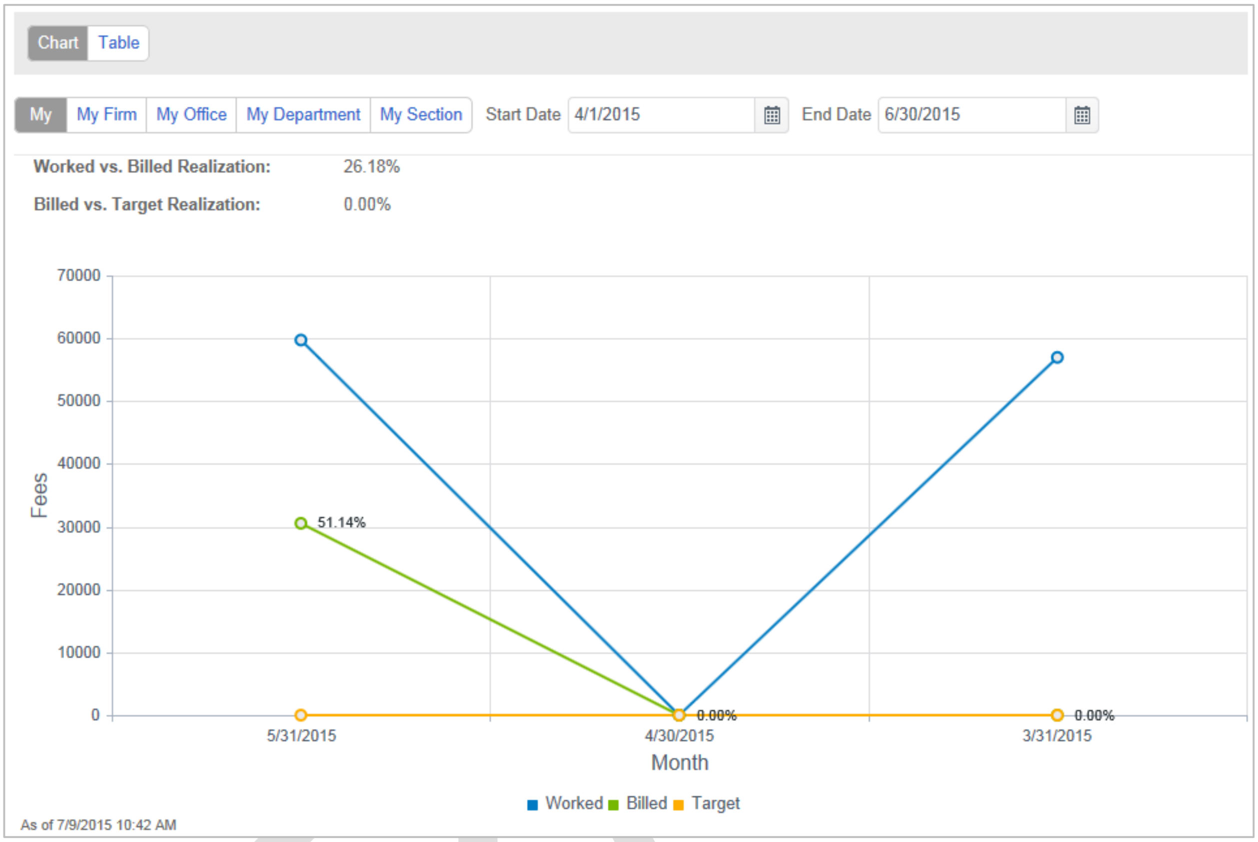
Category	Currency	Current Month Hours	Current Month Fees	YTD Hours	YTD Fees	Prior YTD Hours	Prior YTD Fees
Worked	CAD	0.00	$0.00	0.00	$0.00	0.00	$0.00
Worked	USD	0.00	$0.00	5.00	$1,625.00	594.20	$277,506.05
Billed	CAD	0.00	$0.00	0.00	$0.00	0.00	$0.00
Billed	USD	0.00	$0.00	0.00	$0.00	343.80	$184,251.05
Received	CAD	0.00	$0.00	0.00	$0.00	0.00	$0.00
Received	USD	0.00	$0.00	0.00	$0.00	276.25	$112,543.50
Write-offs	CAD		$0.00		$0.00		$0.00
Write-offs	USD		$0.00		$0.00		$0.00
Costs Worked	CAD		$0.00		$0.00		$0.00

To view additional detail, users can click anywhere in the table to drill into the data.

Upon selection, the 3E Working Timekeeper Inquiry dashboard will be displayed for the current user for the **My** filter. For all other filters, the 3E Management Inquiry dashboard will be displayed.

PRODUCTIVITY REALIZATION TAB

The Productivity Realization chart displays worked vs billed realization and billed vs target realization information. The default view is a line chart. To view in a table view, select the Table button.



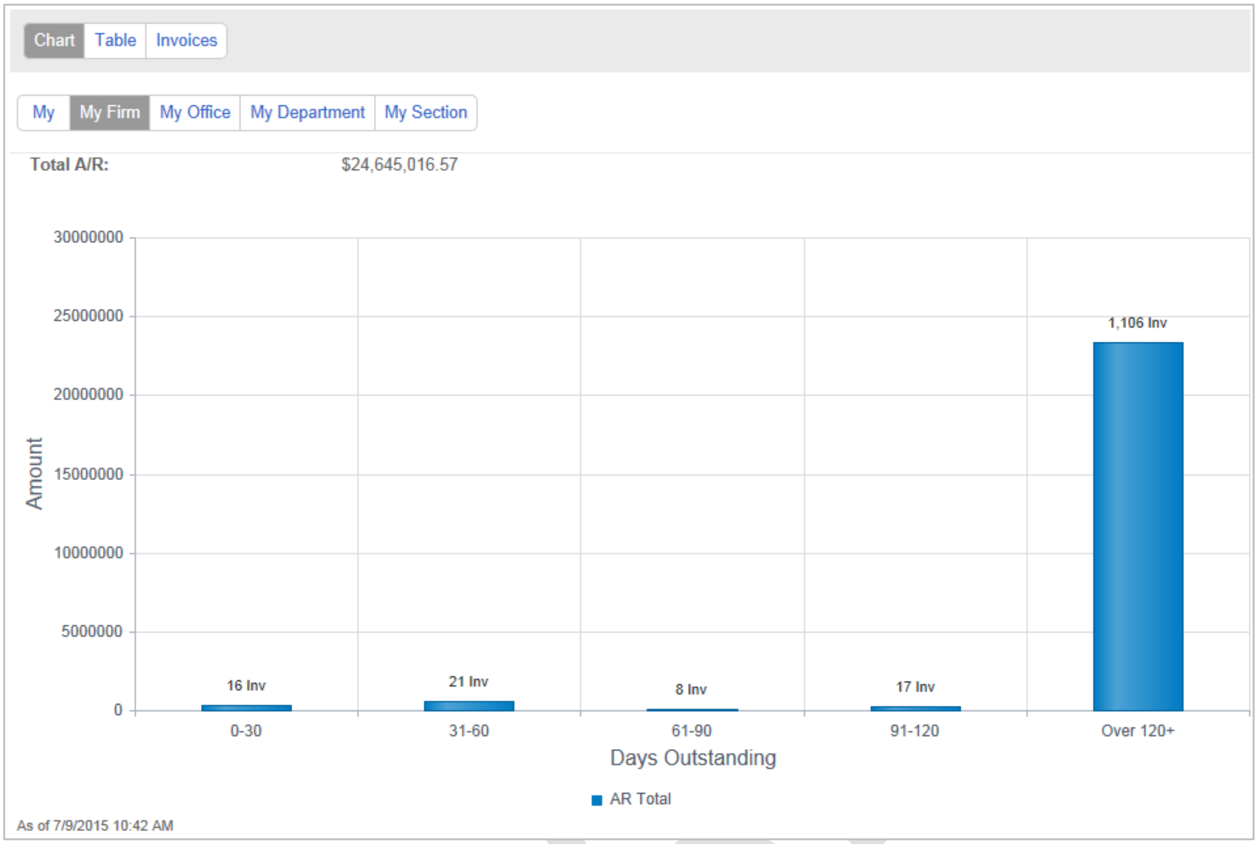
To view additional detail, users can click any data point in the chart or anywhere in the table to drill into the data.

Upon selection, the 3E Working Timekeeper Inquiry dashboard will be displayed for the current user for the **My** filter. For all other filters, the 3E Management Inquiry dashboard will be displayed.

Use the **Start Date** and **End Date** fields to filter the data displayed in the chart to a specified period. The default date range is the current month. The chart and table data will recalculate automatically when the dates change.

A/R SUMMARY TAB

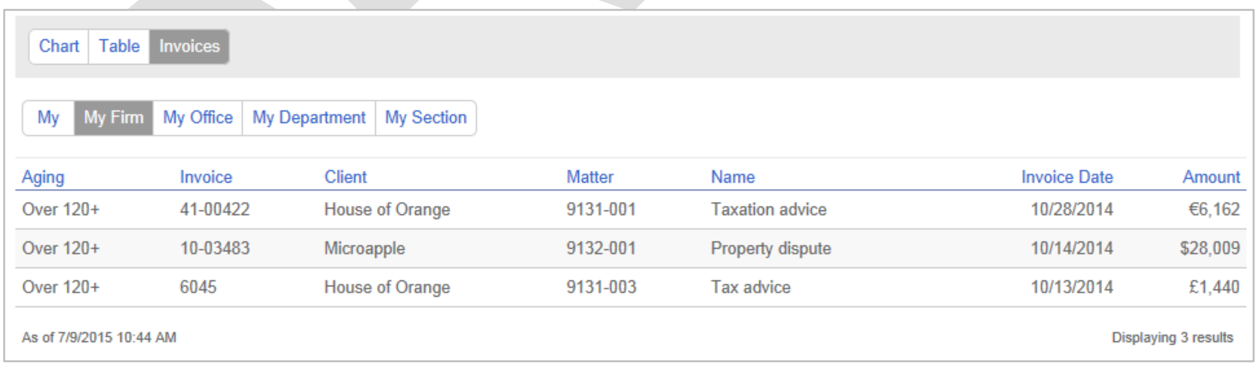
The A/R Summary chart displays current Accounts Receivable (A/R) information. The aging buckets displayed are reflected by those currently set within 3E for the firm. The default view is a bar chart. To view in a table view, select the Table button.



To view additional detail, users can click on a bar in the chart or anywhere in the table to drill into the data.

Upon selection, the 3E Aged AR – Billing Timekeeper Detail metric will be displayed for the current user for the **My** filter. For all other filters, the 3E Management Inquiry dashboard will be displayed.

Users can also view the invoices reflected in the chart/table by selecting the Invoices button. Only those invoices generated and attached to the invoice record in 3E will be displayed in the list.

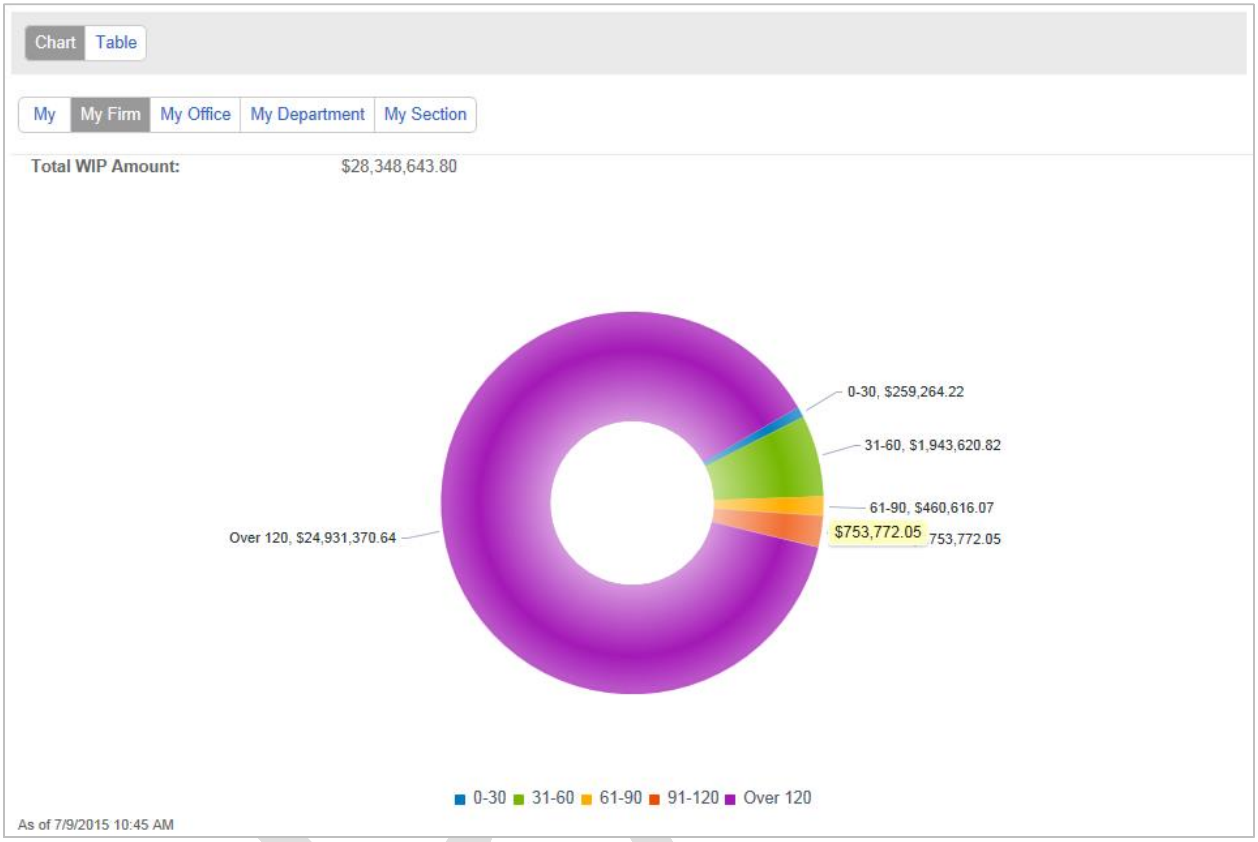


Aging	Invoice	Client	Matter	Name	Invoice Date	Amount
Over 120+	41-00422	House of Orange	9131-001	Taxation advice	10/28/2014	€6,162
Over 120+	10-03483	Microapple	9132-001	Property dispute	10/14/2014	$28,009
Over 120+	6045	House of Orange	9131-003	Tax advice	10/13/2014	£1,440

To view a PDF of the actual invoice, click on the desired row or select View Invoice from the hover menu.

WIP SUMMARY TAB

The WIP Summary chart displays current Work in Progress (WIP) information. The aging buckets displayed are reflected by those currently set within 3E for the firm. The default view is a donut chart. To view in a table view, select the Table button.

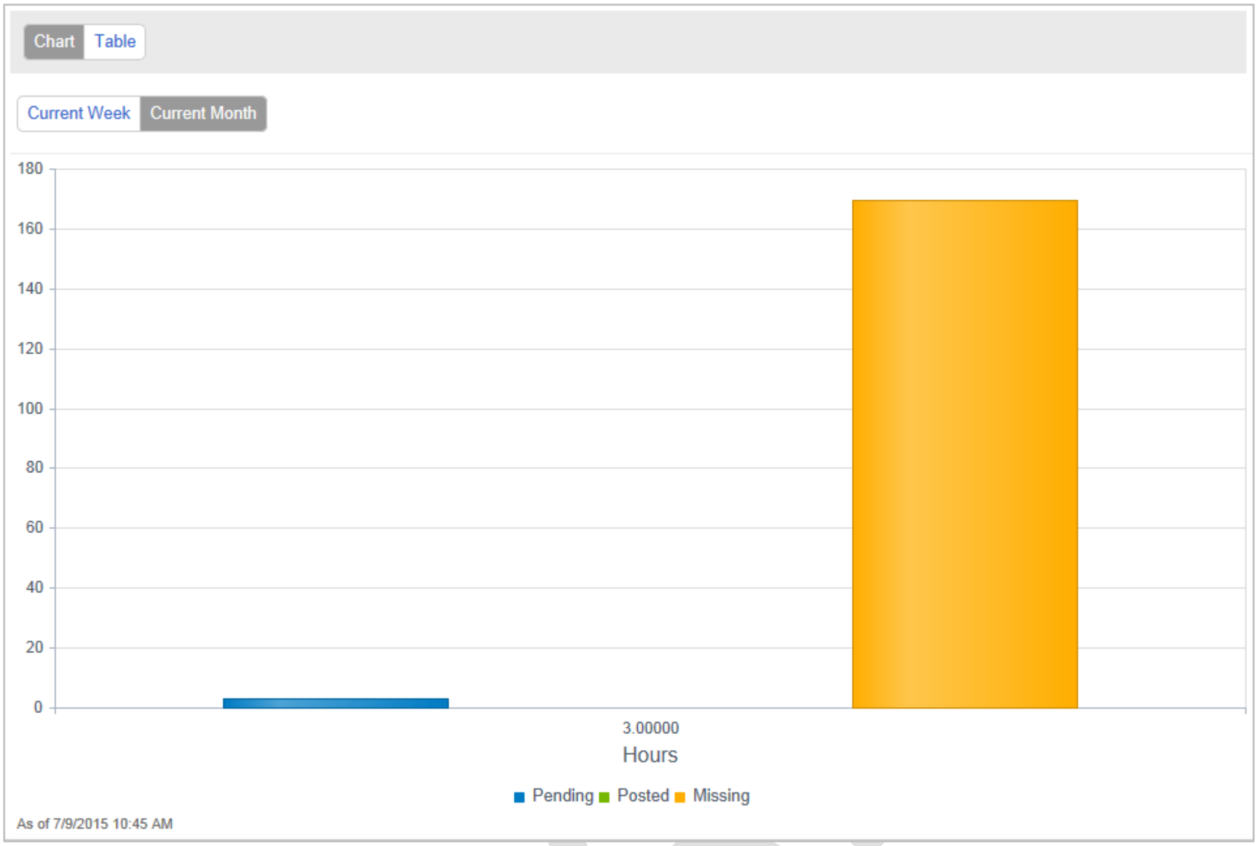


To view additional detail, users can click on a chart segment in the chart or anywhere in the table to drill into the data.

Upon selection, the 3E Aged WIP – Billing Timekeeper Detail metric will be displayed for the current user for the **My** filter. For all other filters, the 3E Management Inquiry dashboard will be displayed.

TIME ENTRY SUMMARY TAB

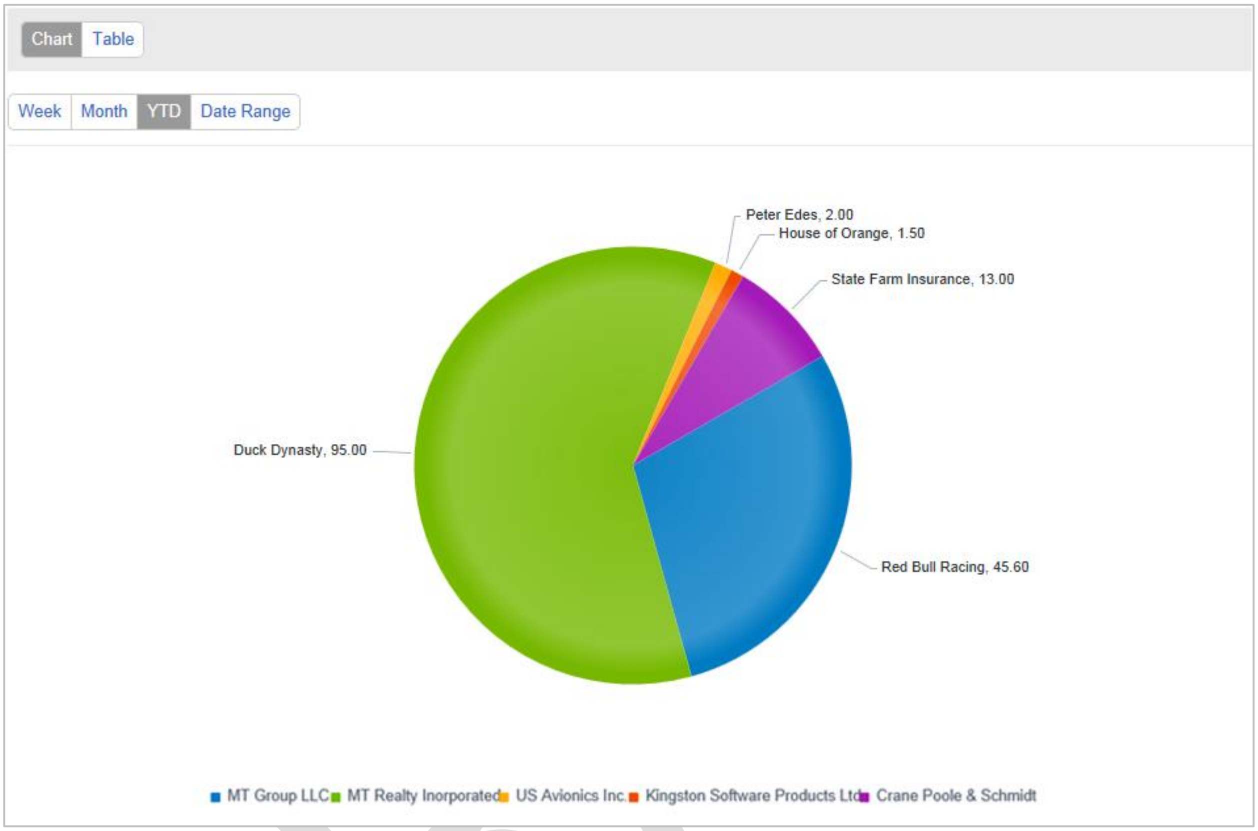
The Time Entry Summary chart displays pending, posted and missing time for the current week and current month. The Current Week filter is defaulted. To see the month view, select the Current Month button. The default view is a bar chart. To view in a table view, select the Table button.



To view additional detail, users can click on a chart segment in the chart or anywhere in the table to drill into the data. Upon selection, the 3E Missing Time – Scheduled metric will be displayed

TIME DISTRIBUTION TAB

The Time Distribution chart displays the clients for whom the current user has entered time for the current week, current month and year to date (YTD) timeframes. The current Week filter is defaulted. To see the month or YTD view, select the Month or YTD button. The default view is a pie chart. To view in a table view, select the Table button



To view additional detail, users can click on a chart segment in the chart or anywhere in the table to drill into the data. Upon selection, the 3E Timekeeper Time Worked Detail metric will be displayed for the current user.

Use the **Start Date** and **End Date** fields to filter the data displayed in the chart to a specified period. The default date range is the current month. The chart and table data will recalculate automatically when the dates change.

CALENDAR FIELD DEFINITIONS

The Calendar Navigation bar function is intended to view your Microsoft Outlook Web Access (OWA) calendar within Workspace. Depending on how OWA is configured, you may have to login to view the calendar.

OWA Link

The default URL for the function is http://www.elite.com. During the installation or during the implementation process, this URL should be changed to your firm's Outlook Web Access URL. To allow direct access to the OWA calendar view, be sure to add the calendar parameter [**calendar#**] the URL (e.g., https://webmail.abcpaint.com/owa/?cmd=contents&module=**calendar#**).

Seamless Login

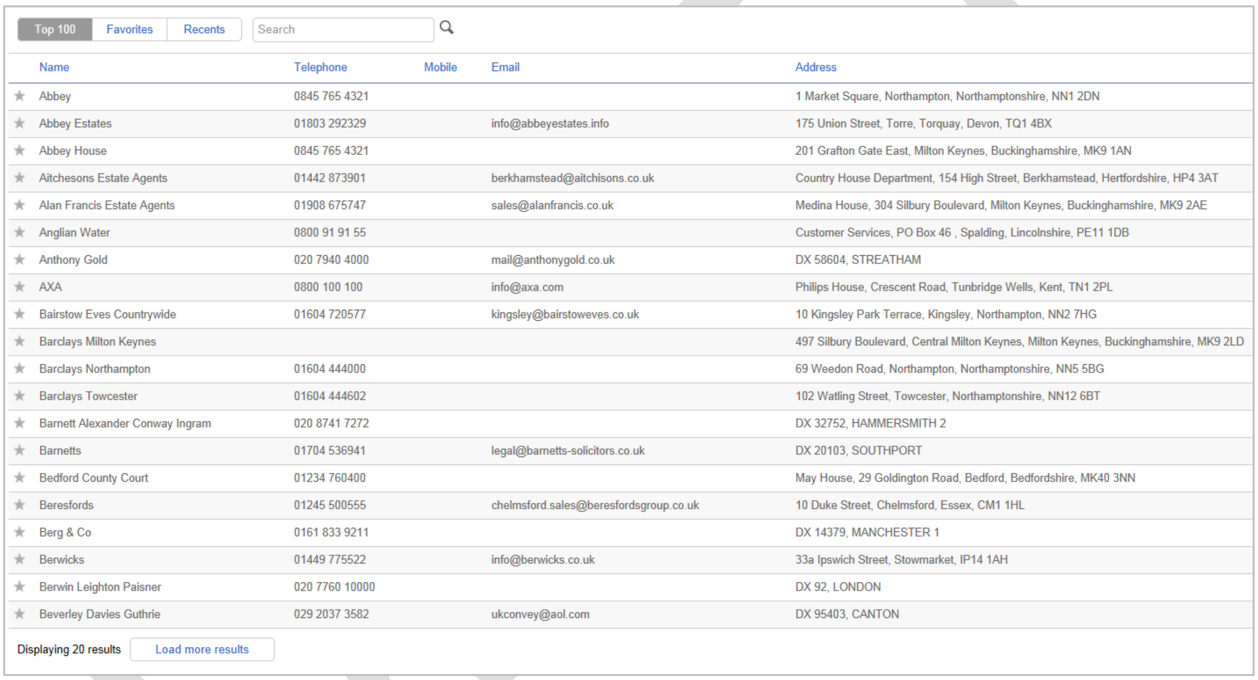
Seamless login is dependent upon the configuration of the firm's Exchange server and is not controlled by Workspace. Please consult your firm's Exchange administrator to pursue seamless login. The details provided here are only for reference and may be different for your firm's server.

Seamless login must be setup on Exchange Security to digest NT. Exchange 2013 by default does not support iFrames. The Exchange Server needs to be configured to support this modifying the HTTP Header Request "X-Frame-Options" value to "allow." For pre-2013 versions of Exchange, see this Microsoft TechNet article on How to Use Outlook Web Access Web Parts.

CONTACTS FIELD DEFINITIONS

(MATTERSPHERE-ONLY SETUP)

Workspace provides a Contacts option on the Navigation bar in the MatterSphere-Only configurations to allow for quick access to and searching for MatterSphere associate names.

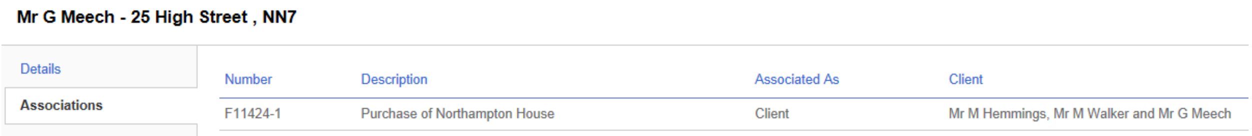

Top 100 Favorites Recents Search

Name	Telephone	Mobile	Email	Address
Abbey	0845 765 4321			1 Market Square, Northampton, Northamptonshire, NN1 2DN
Abbey Estates	01803 292329		info@abbeyestates.info	175 Union Street, Torre, Torquay, Devon, TQ1 4BX
Abbey House	0845 765 4321			201 Grafton Gate East, Milton Keynes, Buckinghamshire, MK9 1AN
Aitchesons Estate Agents	01442 873901		berkhamstead@aitchisons.co.uk	Country House Department, 154 High Street, Berkhamstead, Hertfordshire, HP4 3AT
Alan Francis Estate Agents	01908 675747		sales@alanfrancis.co.uk	Medina House, 304 Silbury Boulevard, Milton Keynes, Buckinghamshire, MK9 2AE
Anglian Water	0800 91 91 55			Customer Services, PO Box 46 , Spalding, Lincolnshire, PE11 1DB
Anthony Gold	020 7940 4000		mail@anthonygold.co.uk	DX 58604, STREATHAM
AXA	0800 100 100		info@axa.com	Philips House, Crescent Road, Tunbridge Wells, Kent, TN1 2PL
Bairstow Eves Countrywide	01604 720577		kingsley@bairstoweves.co.uk	10 Kingsley Park Terrace, Kingsley, Northampton, NN2 7HG
Barclays Milton Keynes				497 Silbury Boulevard, Central Milton Keynes, Milton Keynes, Buckinghamshire, MK9 2LD
Barclays Northampton	01604 444000			69 Weedon Road, Northampton, Northamptonshire, NN5 5BG
Barclays Towcester	01604 444602			102 Watling Street, Towcester, Northamptonshire, NN12 6BT
Barnett Alexander Conway Ingram	020 8741 7272			DX 32752, HAMMERSMITH 2
Barnetts	01704 536941		legal@barnetts-solicitors.co.uk	DX 20103, SOUTHPORT
Bedford County Court	01234 760400			May House, 29 Goldington Road, Bedford, Bedfordshire, MK40 3NN
Beresfords	01245 500555		chelmsford.sales@beresfordsgroup.co.uk	10 Duke Street, Chelmsford, Essex, CM1 1HL
Berg & Co	0161 833 9211			DX 14379, MANCHESTER 1
Berwicks	01449 775522		info@berwicks.co.uk	33a Ipswich Street, Stowmarket, IP14 1AH
Berwin Leighton Paisner	020 7760 10000			DX 92, LONDON
Beverley Davies Guthrie	029 2037 3582		ukconvey@aol.com	DX 95403, CANTON

Displaying 20 results Load more results

Upon selection of the Contacts icon, a list of MatterSphere associates will be displayed. The initial display lists the Top 100 associates from MatterSphere.

The user may select a contact to view more details including company or personal details and its associations to clients and/or matters.



The user may additionally select an association to drill directly to the client or matter record for the association.

FILTERS

The filter buttons are provided to allow the user to quickly locate the desired contact, select it and view the contact detail screens. The Search option is provided should the selected filter list be too large or the desired client not display.

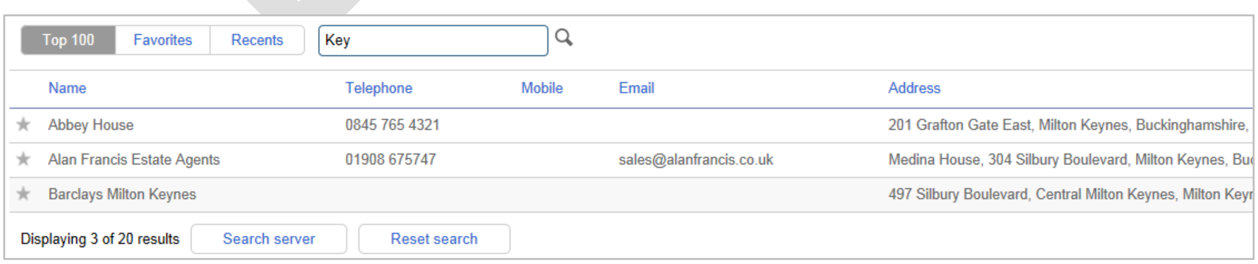
The filters provide the following functionality:

- Top 100 – filters the list of contacts to the top 100 from the MatterSphere database.
- Favorites – filters the list of contacts to those contacts previously marked as a favorite by the user. Favorites are marked by clicking the star icon on the list view or within a detail screen.
- Recent – filters the list of contacts to those the user has recently viewed.

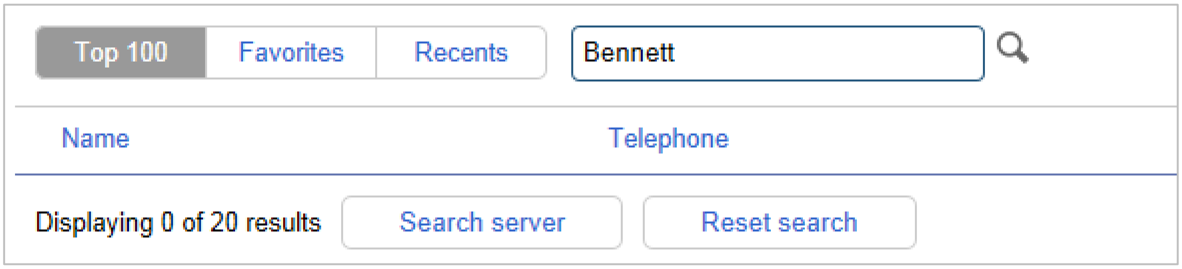
SEARCH CONTACTS

The Search function has dual functionality – it provides a search within the currently displayed list and, if not found, allows for a full search of all associates in MatterSphere.

To search within the current list, the user can simply enter part or all of the name or any value within the columns in the list (e.g., address, telephone, mobile, email, etc.) and results will be filtered automatically.



If the result is not found, the list will be empty and a “Search server” button will be displayed. The user can click the button to have the search executed and any results will then be displayed.



PAGING

All lists and search results are paged to limit negative system performance. Paging defaults to displaying 20 results at a time. To view more results, click the “Load more results” button. The next 20 results will be added to the list. To view 20 more, click the button again and so on.

The default paging amount of 20 can be changed in the Designer configuration program.

BDP-RELATED CONFIGURATIONS

A Contacts option displays on the Workspace Navigation bar for BDP-related configurations. For further details on this option, see the *Business Development Premier: Workspace with 3E User Guide.*

COMPANIES FIELD DEFINITIONS (BDP-RELATED CONFIGURATIONS)

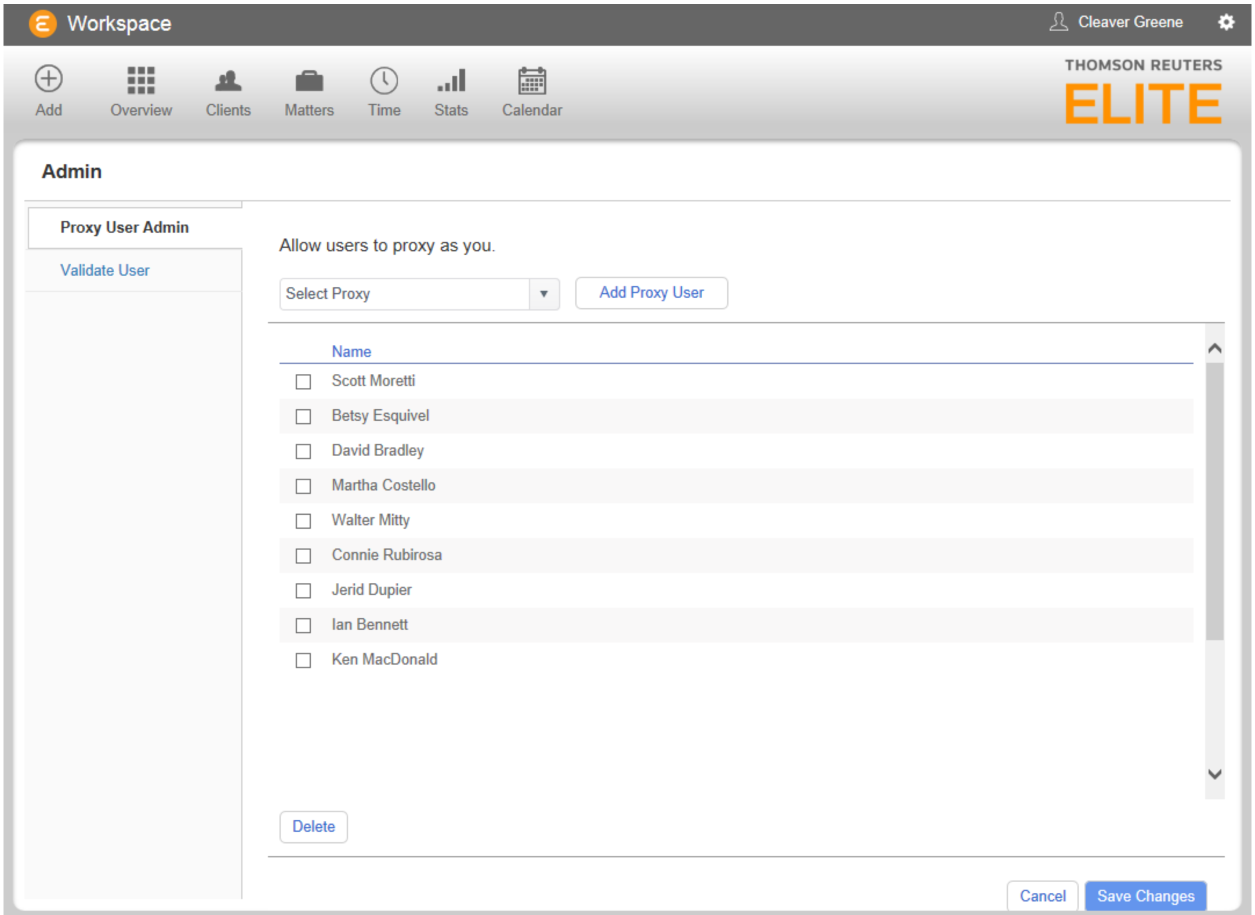
This page displays a list of you firms contacts (i.e., People you or your firm know who work at other companies). This features is only accessible for BDP related configurations. For further detail on the Companies detail view, see the *Business Development Premier: Workspace with 3E User Guide.*

LIST FIELD DEFINITIONS (BDP-RELATED CONFIGURATIONS)

This page displays the marketing lists created by your firm that you can invite contacts to join. This features is only accessible for BDP related configurations. For further detail on the Companies detail view, see the *Business Development Premier: Workspace with 3E User Guide*.

PROXY USER ADMIN FIELD DEFINITIONS

Use the options on the Proxy User Admin tab to add or remove proxy users. To access this form, select **Settings > Admin**.



Select Proxy

Select a user from this drop-down list to add to your proxy list.

Add Proxy User

Click this button to add the selected user to the proxy list.

Proxy User List

This list displays users you can currently select as a proxy user.

Delete

Click this button to delete any user for which the adjacent checkbox has been selected.

APPENDIX A: CONFIGURATIONS & AVAILABLE OPTIONS

The following tables list the tabs and panels available for each configuration within the client and matter detail views and the source product for the specified detail tab. A blank item means it is not available for the specified configuration.

3E & MS: CLIENT DETAIL VIEW TABS & PANELS

	3E + MS (Web)	3E-Only (Web)	MS-Only (Web)	3E + MS (Mobile)	3E-Only (Mobile)	MS-Only (Mobile)
TABS						
Details	3E	3E	MS	3E	3E	MS
Team	3E	3E		3E	3E	
Related Parties	3E	3E		3E	3E	
Contacts	MS		MS	MS		MS
Matters	3E/MS	3E	MS	3E/MS	3E	MS
Documents	MS or Autonomy iManage	Autonomy iManage or n/a	MS or Autonomy iManage	MS or Autonomy iManage	Autonomy iManage or n/a	MS or Autonomy iManage
Financials	3E	3E		3E	3E	
Billing Realization	3E	3E		3E	3E	
A/R Aging	3E	3E		3E	3E	
WIP Aging	3E	3E		3E	3E	
PANELS						
Tasks	3E	3E				
Legal Research	Westlaw Next	Westlaw Next	Westlaw Next			

3E & MS: MATTER DETAIL VIEW TABS & PANELS

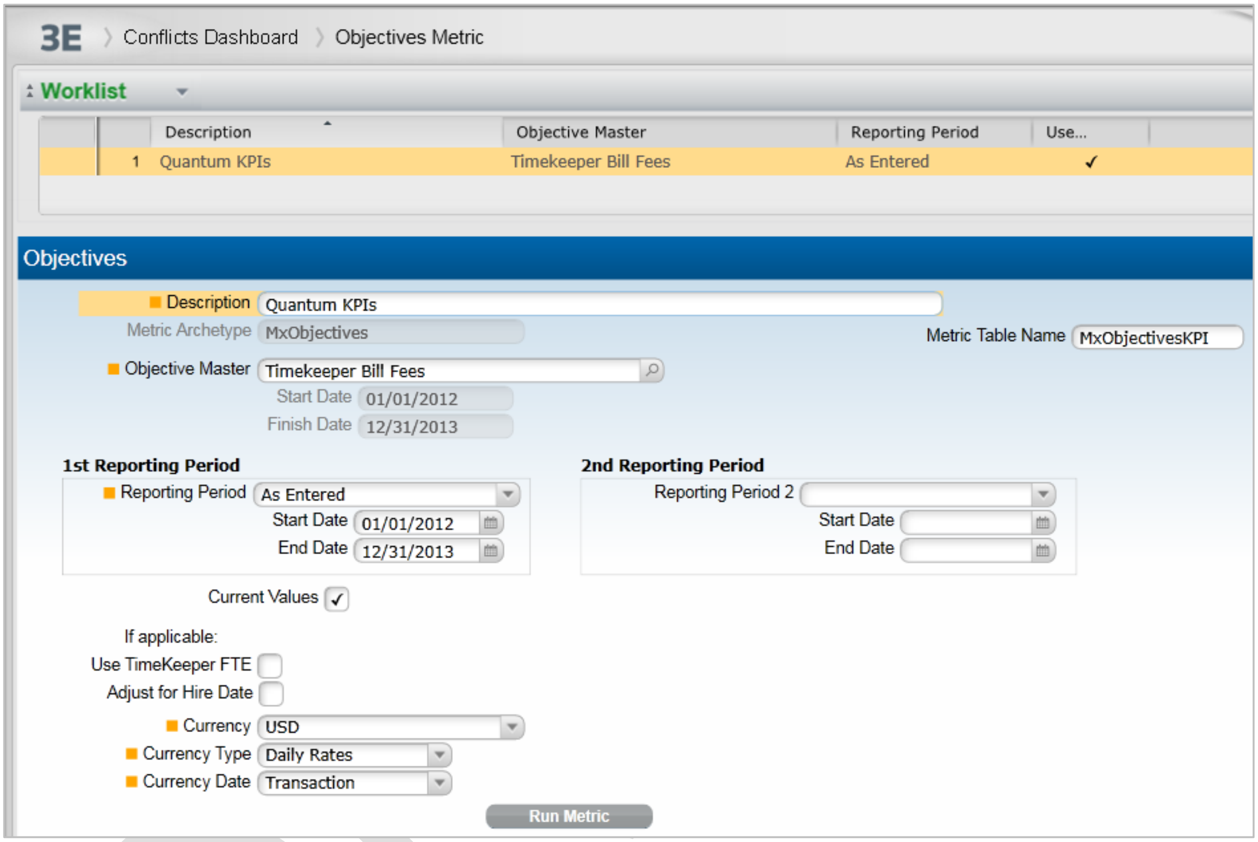
	3E + MS (Web)	3E-Only (Web)	MS-Only (Web)	3E + MS (Mobile)	3E-Only (Mobile)	MS-Only (Mobile)
TABS						
Details	3E	3E	MS	3E	3E	MS
Related Parties	3E	3E		3E	3E	
Contacts	MS		MS	MS		MS
Documents	MS or Autonomy iManage	Autonomy iManage or n/a	MS or Autonomy iManage	MS or Autonomy iManage	Autonomy iManage or n/a	MS or Autonomy iManage
Financials	3E	3E		3E	3E	
Budget Details	3E	3E		3E	3E	
Billing Realization	3E	3E		3E	3E	
A/R Aging	3E	3E		3E	3E	
WIP Aging	3E	3E		3E	3E	
PANELS						
Tasks	3E, MS	3E	MS			
Legal Research	WestlawNext	WestlawNext	WestlawNext			

APPENDIX B: 3E METRIC PARAMETER EXAMPLES

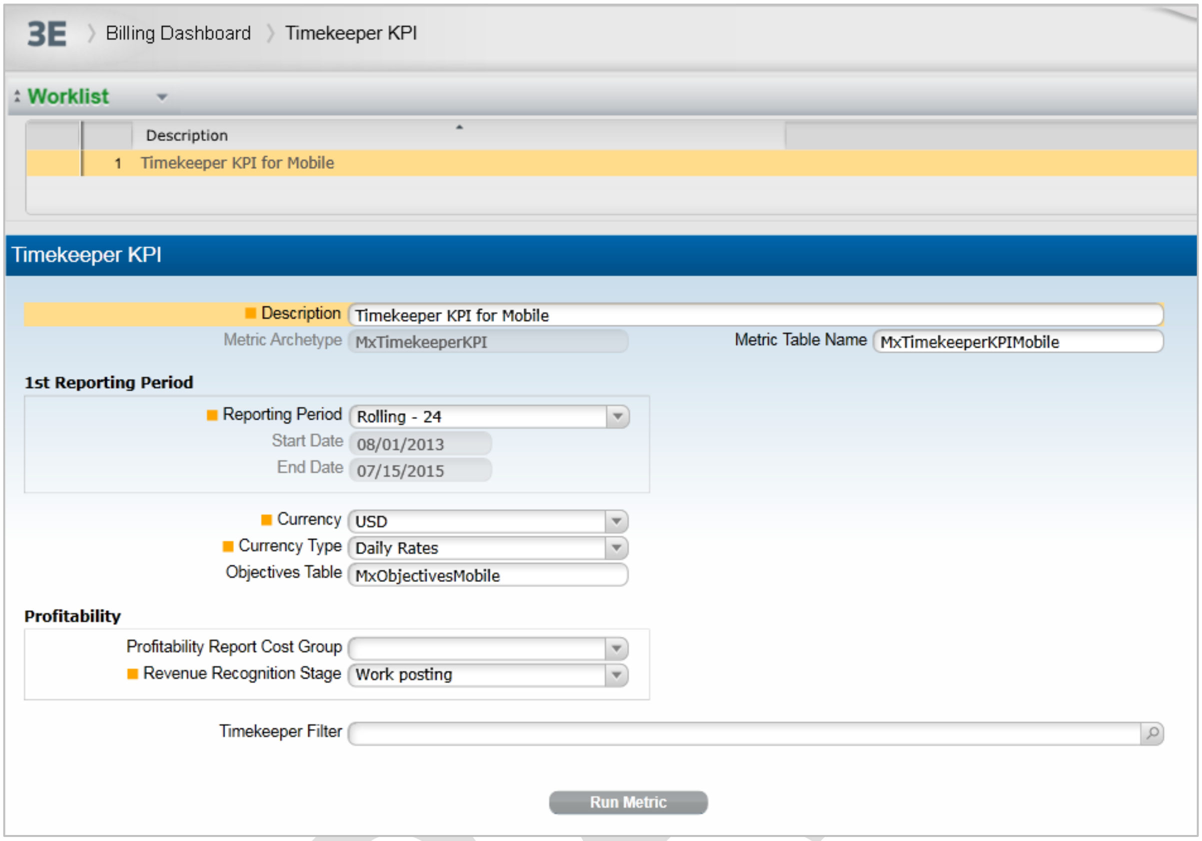
The following are examples of 3E metrics used with Workspace and their parameters.

Note*: The exact parameters may differ at your firm depending on your firm's preferences.*

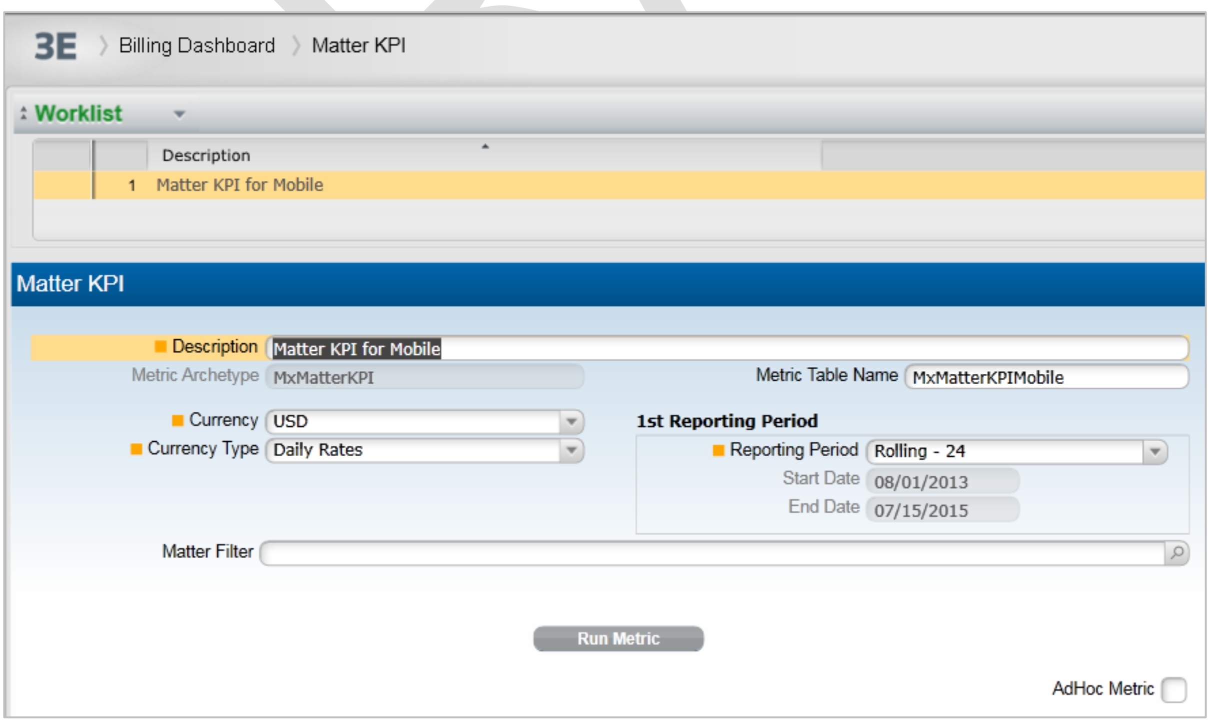
OBJECTIVES METRIC



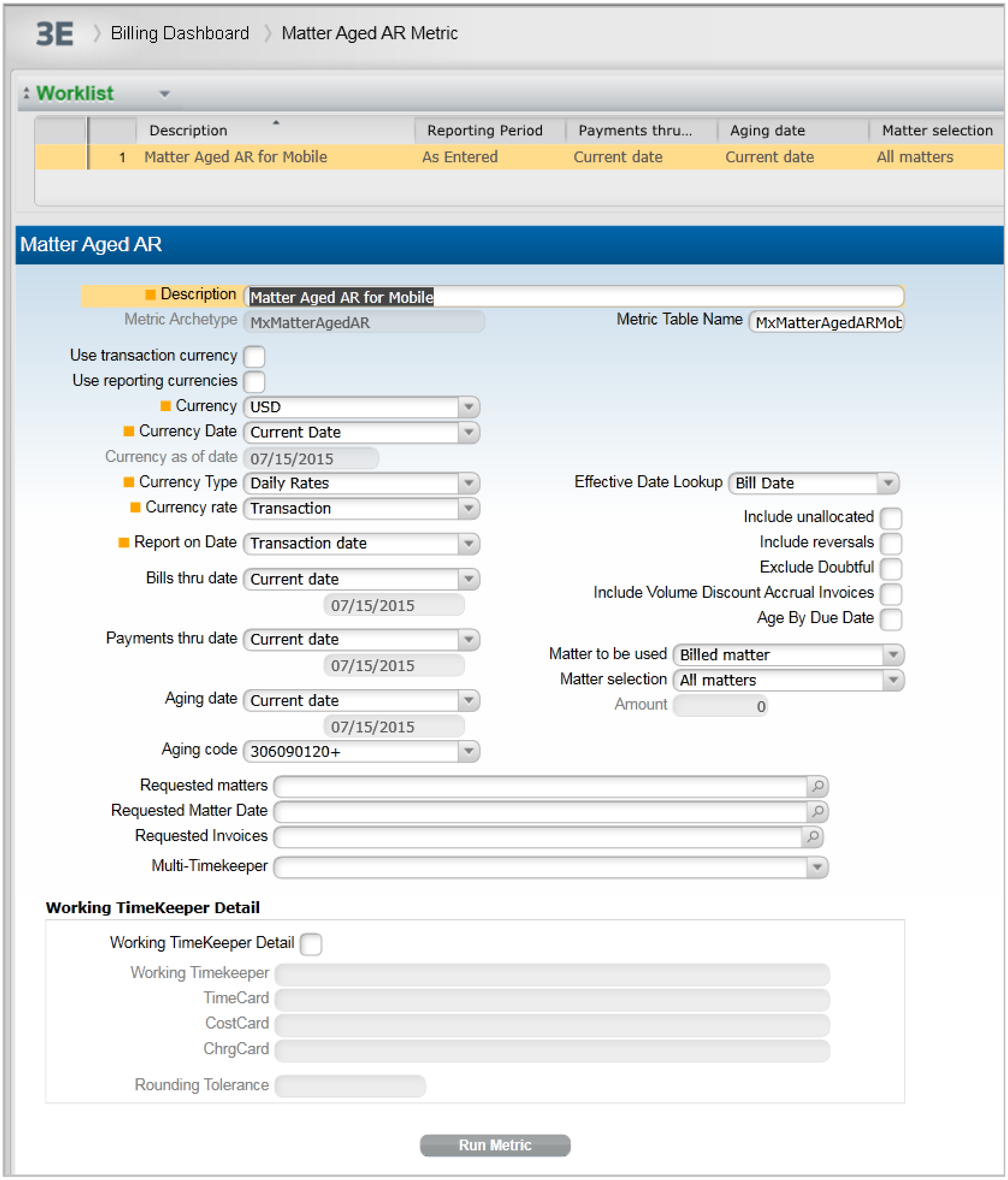
TIMEKEEPER KPI METRIC



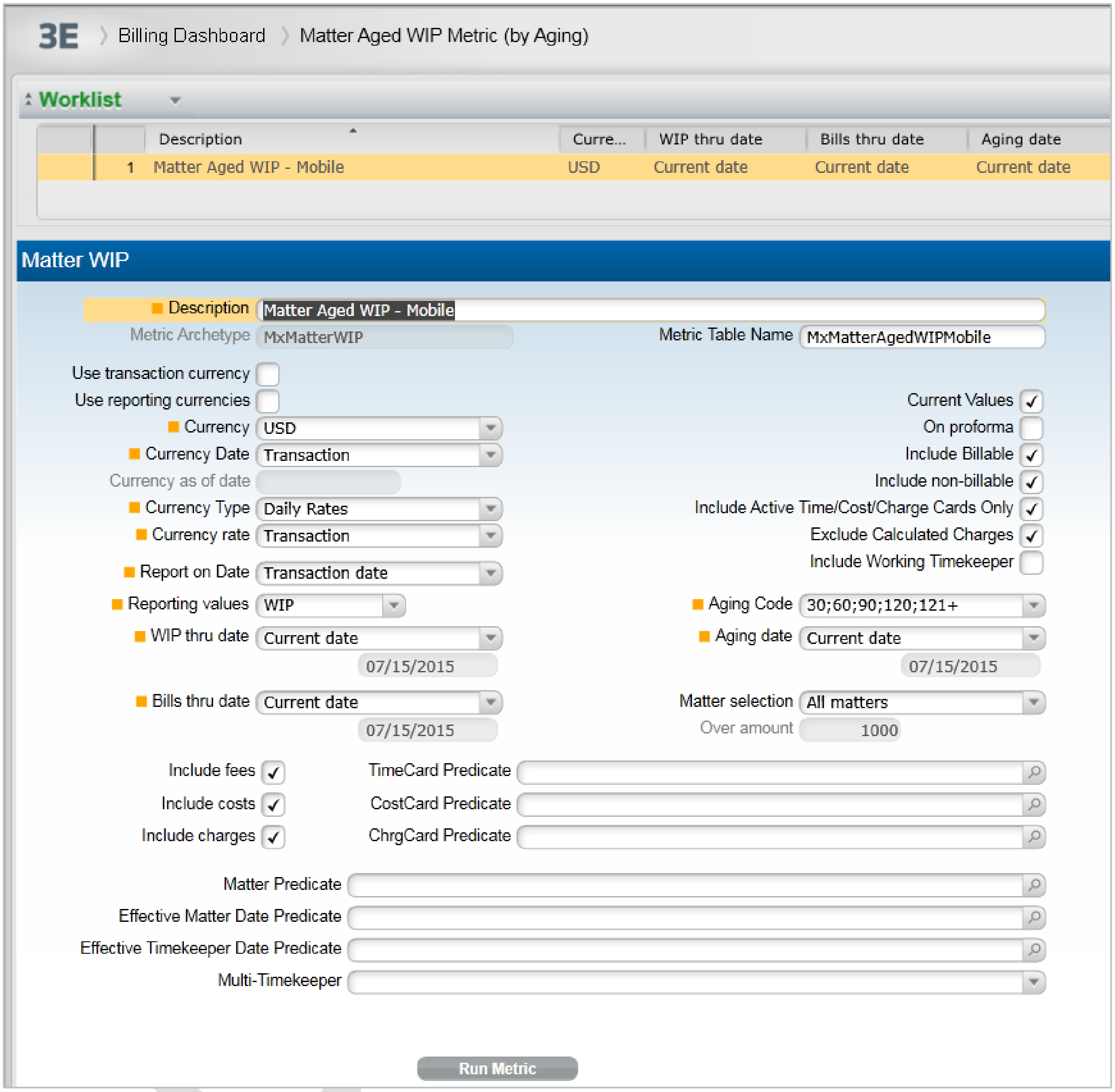
MATTER KPI



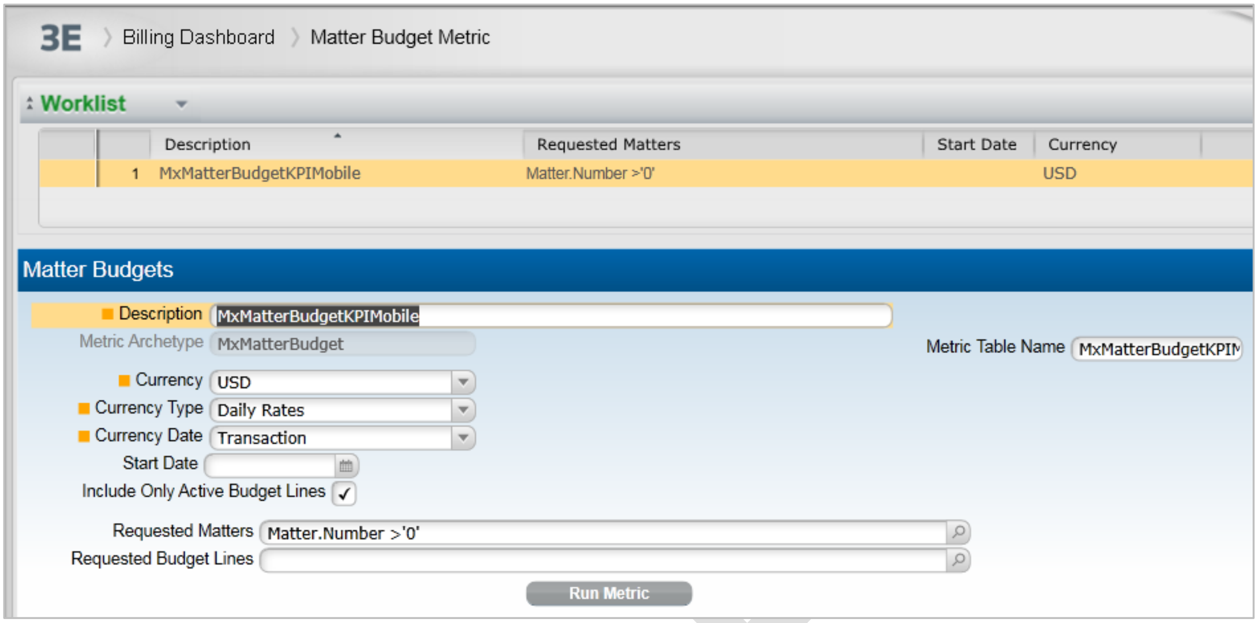
MATTER AGED AR METRIC



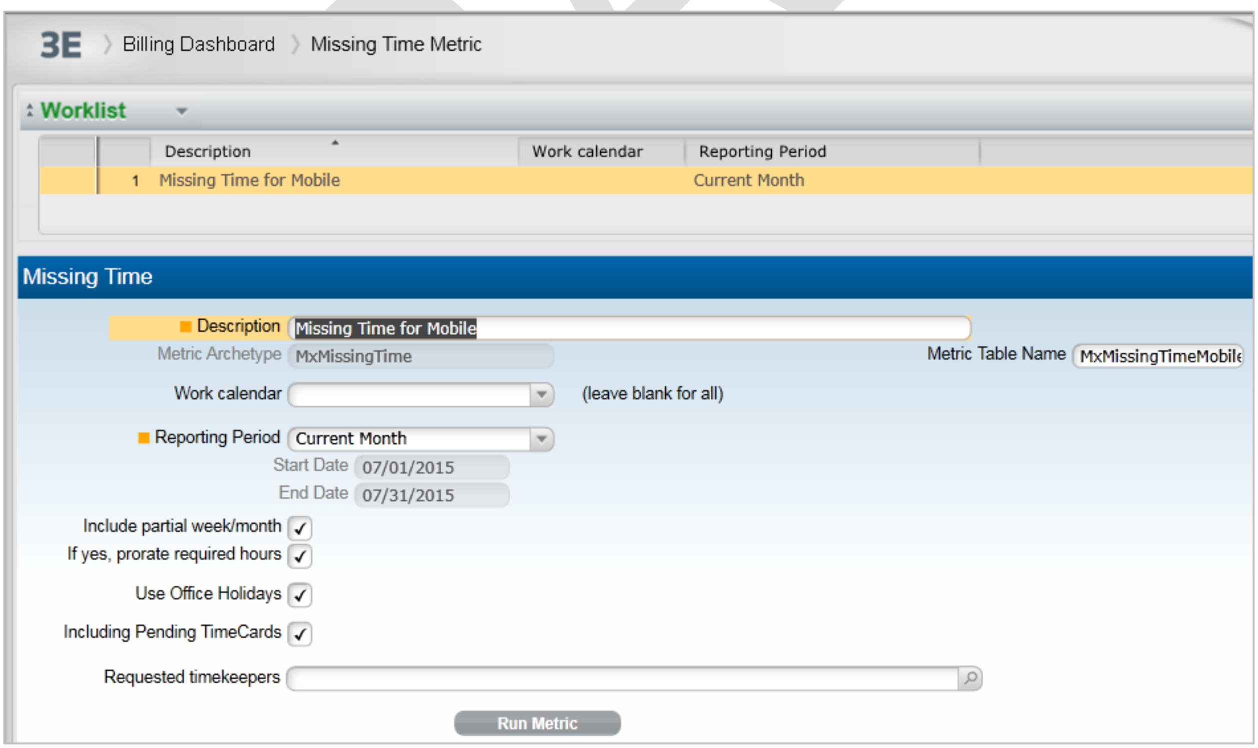
MATTER AGED WIP METRIC (BY AGING)



MATTER BUDGET METRIC

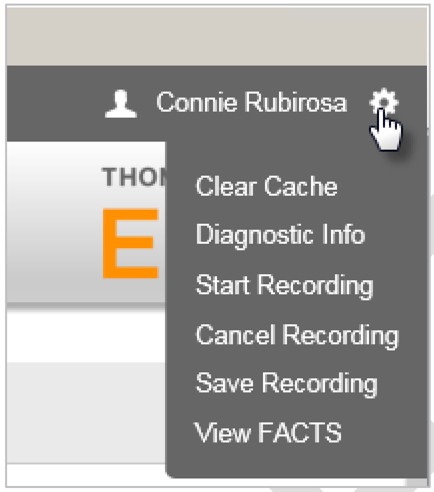


MISSING TIME METRIC



APPENDIX C: TROUBLESHOOTING WORKSPACE

The utility menu accessed via the gear icon adjacent to the user name at the top-right of the screen provides access to functions for FACTS, cache clearing and diagnostic info for Elite Support and Technology personnel.



CLEAR CACHE

The Clear Cache option is used primarily after making Workspace screen configuration changes within the Designer program. As some configurations are cached, a change will not necessarily be seen in the Workspace user interface without clearing the cache. After the configuration change is made and saved in the Designer it will be immediately available in Workspace. If refreshing the browser does not display the change, select the Clear Cache option and then refresh the browser to see the change.

Note*: Not available for Elite Mobile.*

FACTS

Workspace and EIF provide a built-in recording mechanism for testing and troubleshooting issues to assist firm and Elite Support and Technology personnel pinpoint issue sources. These built-in functions make up FACTS – the Framework and Configuration Testing System.

If you find a reproducible issue within the EIF and Workspace, you can start a recording, go through the steps to reproduce the issue, then stop the recording. The FACTS recordings can be submitted to Elite Support along with information on an issue and in turn greatly speed up issue resolution.

The Start Recording, Cancel Recording, Save Recording and View FACTS menu items are all part of FACTS.

CREATE RECORDING

Do the following to make a FACTS recording and discovering an issue that you are able to reproduce.

The following steps also apply to Elite Mobile.

1. Select **Settings** > **Start Recording**.
2. Click **OK** on the confirmation message. The title bar will also display a message to alert the user that a recording is in progress.
3. Perform the actions to reproduce the issue.
4. Select **Settings > Save Recording** after completing the steps for recording.
5. Enter a Name and Description and click **Save**.

   Note: *No description is required with Elite Mobile.*
6. Select **Settings > Cancel Recording** item to end the recording.

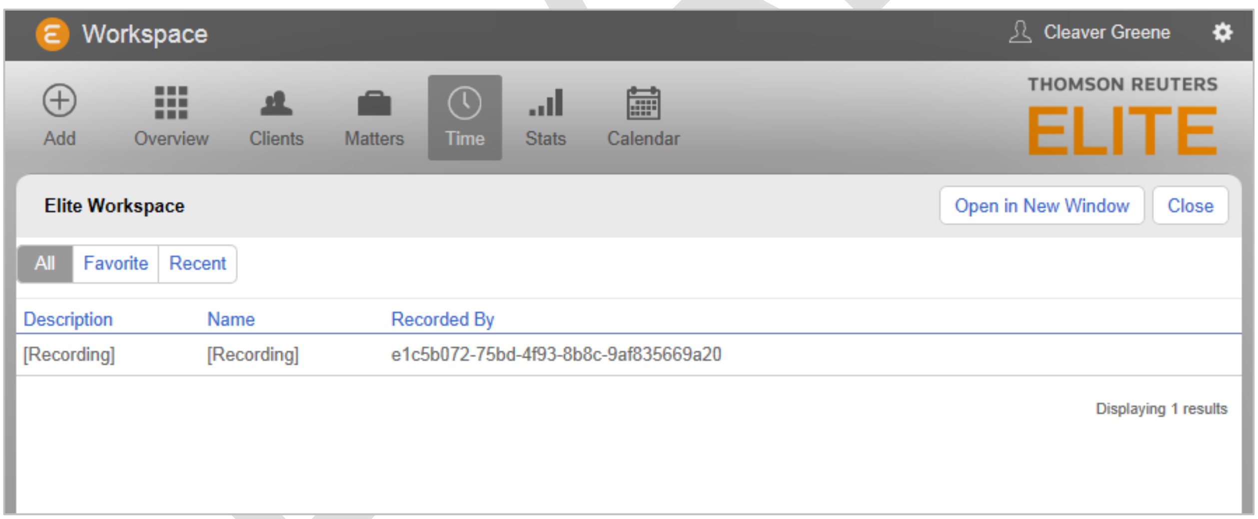
VIEW RECORDING DETAIL

You can view a list recordings, created by yourself or other staff. The recordings display requests and responses between Workspace and the source application server. On the Workspace website, you can view history and details for each exchange.

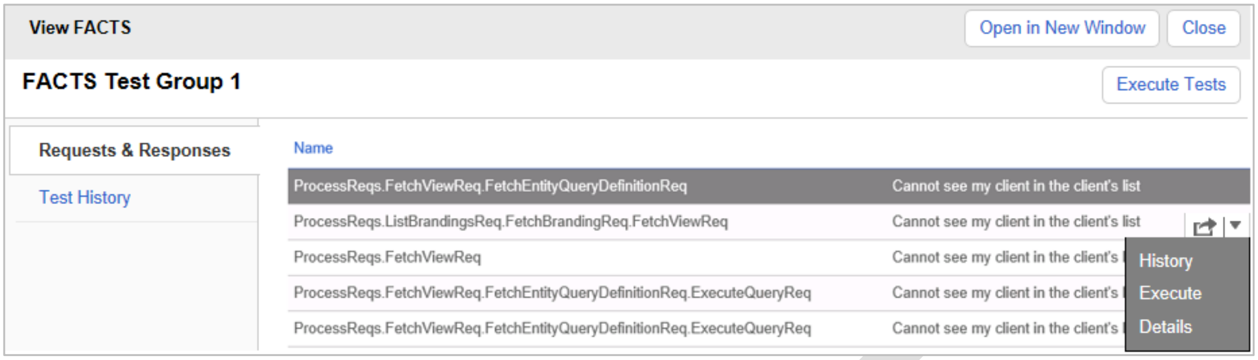
Note: *FACTS also has the ability to play back these recordings, but it is not recommended.*

WEBSITE

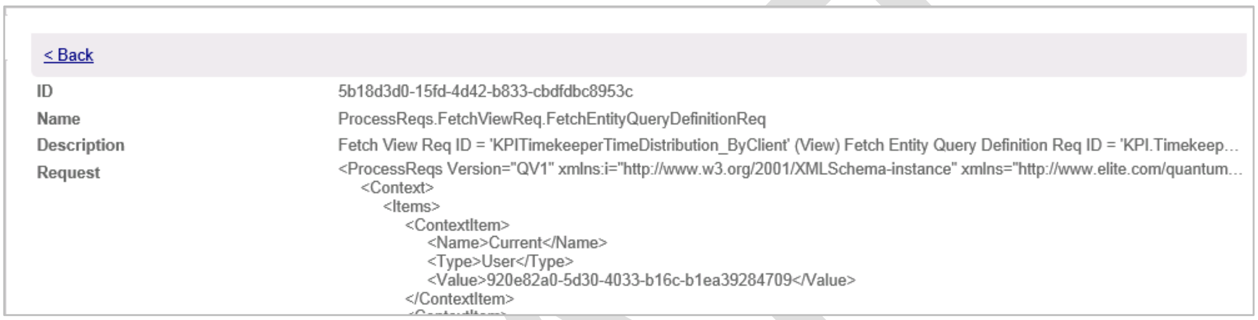
Do the following to see what was recorded:



1. Select **Settings > View FACTS**.
2. Click the recording in the list to display all of the requests and responses related to it.
3. On the Requests & Responses tab, on the far-right side of the row, a hover menu will display as you mouse over that area.



4. Select the **Details** to display the XML the user interface is sending to the server and the server response.



ELITE MOBILE

Do the following to view a list of recording via Elite Mobile:

1. Select **Settings > View FACTS**.
2. Tap the recording in the list to display all of the requests and responses related to it.
3. Select **Request & Responses**.

***Note**: you can view history and details for each exchange on the Workspace website.*

SUBMIT RECORDINGS TO SUPPORT

Do the following to submit the recording with your Support service request:

1. Gather the recording files located in the EIF store from the EIF server by doing one of the following:
   - Navigate to **[instance]\Store\Entities**.
   - View the Services web.config file in the Q section as storage root='[store location]"; if there is no setting, the store is located in the same directory structure at the root in a folder called "Store."
2. Go to the FACTS and FACTSGroup folders and select the files that match the time/date stamp of the recording.
3. Attach the recording files to the Support service request or send to Elite when asked by Elite Support personnel.

EIF LOGGING

Logging in EIF is much more extensive than FACTS recording. Logging stores information from Client to Server – like with FACTS – but internal EIF services information is also logged. The main reasons FACTS is used instead of logging are no configuration settings need to be changed to enable FACTS (whereas logging require such configuration setting changes) and FACTS records only specified actions for a specific user (whereas logging records all actions for all users).

See the **Elite Integration Framework Designer Guide** document's Configuration Editor section for more information on turning on logging options.

***Note**: Errors are always logged regardless of settings.*

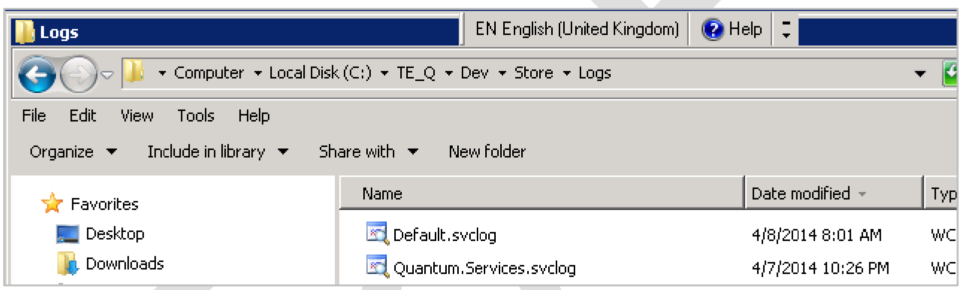
VIEWING EIF LOGS

Do the following to view EIF logs:

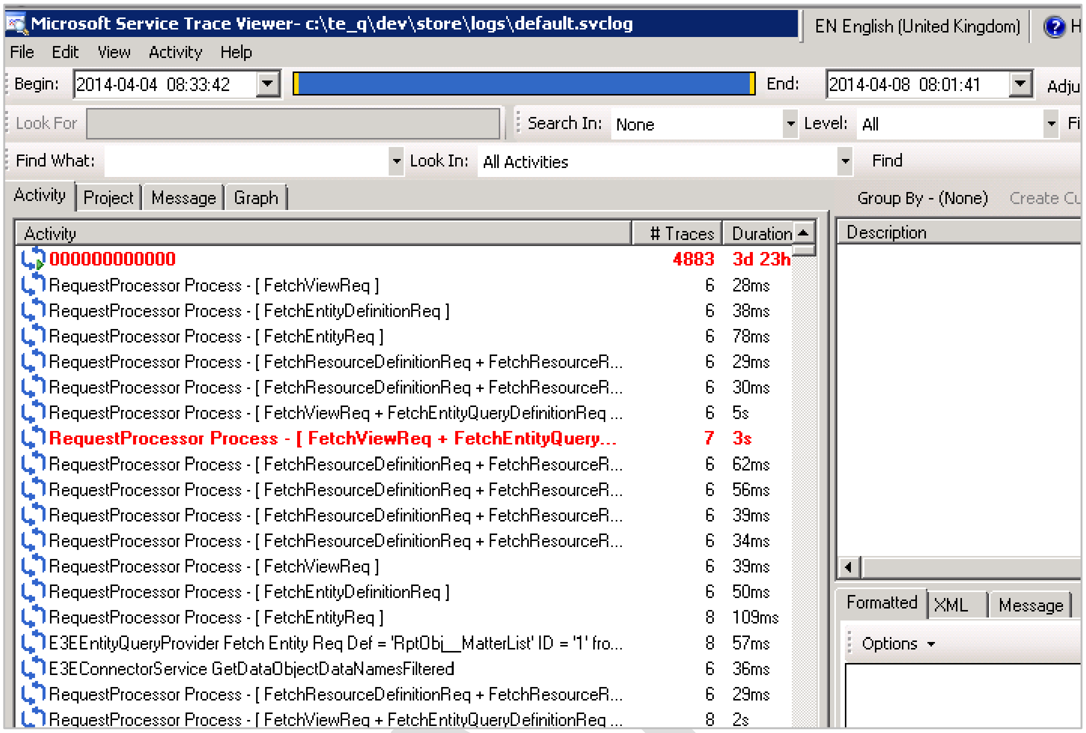
***Note**: Microsoft Service Trace Viewer is required to view EIF logs.*

1. Using the MS Trace View, open the log folder ([Instance]\Store\Logs). Several log files may be listed depending on how your firm's various sites are configured, but the primary log of interest is the Defaul.svclog file.

   EIF Logs are located in the store location detailed in the Submit Recordings to Support steps.



2. Open the log file to display information such as the detail shown in the following example:



Red items indicate errors. All other items are the result of configuration settings described in the **Elite Integration Framework Guide** document.

3. Select an item in the log to display more information in the panels on the right side of the screen. In addition, the graph mode on the left shows nested information which can be useful.
4. Attached The Default.svclog file to support requests to provide more information for troubleshooting.