

Quick Reference Guide

Using Find People - there are 5 steps to complete this task:

1. **[Press Find People.](#)**
2. **[Enter search criteria.](#)**
3. **[Press Search.](#)**
4. **[Select contact from search results.](#)**
5. **[Press Edit or Files to view additional information.](#)**

Using System Management - there are 5 steps to complete this task:

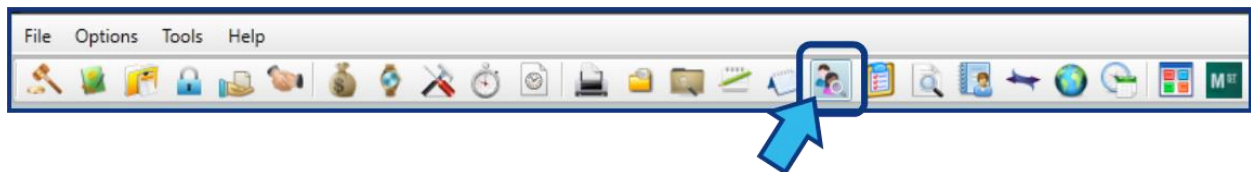
1. **[Open System Management.](#)**
2. **[Select People.](#)**
3. **[Enter search criteria.](#)**
4. **[Select contact from search results.](#)**
5. **[Press Edit or Files to view additional information.](#)**

Standard Guide

Using Find People

Step 1. Press Find People.


On the **Global Toolbar**, press the **Find People** icon. A **People Search Criteria** window appears.



Step 2. Enter search criteria.

Enter information used to identify the person or firm. Partial information may be used.

People Search Criteria

 **Enter people search criteria** Search Type Begins With Contains

Name Prefix First (or Company Name) Middle Last Suffix

Position Title

Company Type

DOB From To

Height From To

Weight From To

Sex Race Hair Eyes License

Tax ID / SSN

Address Phone

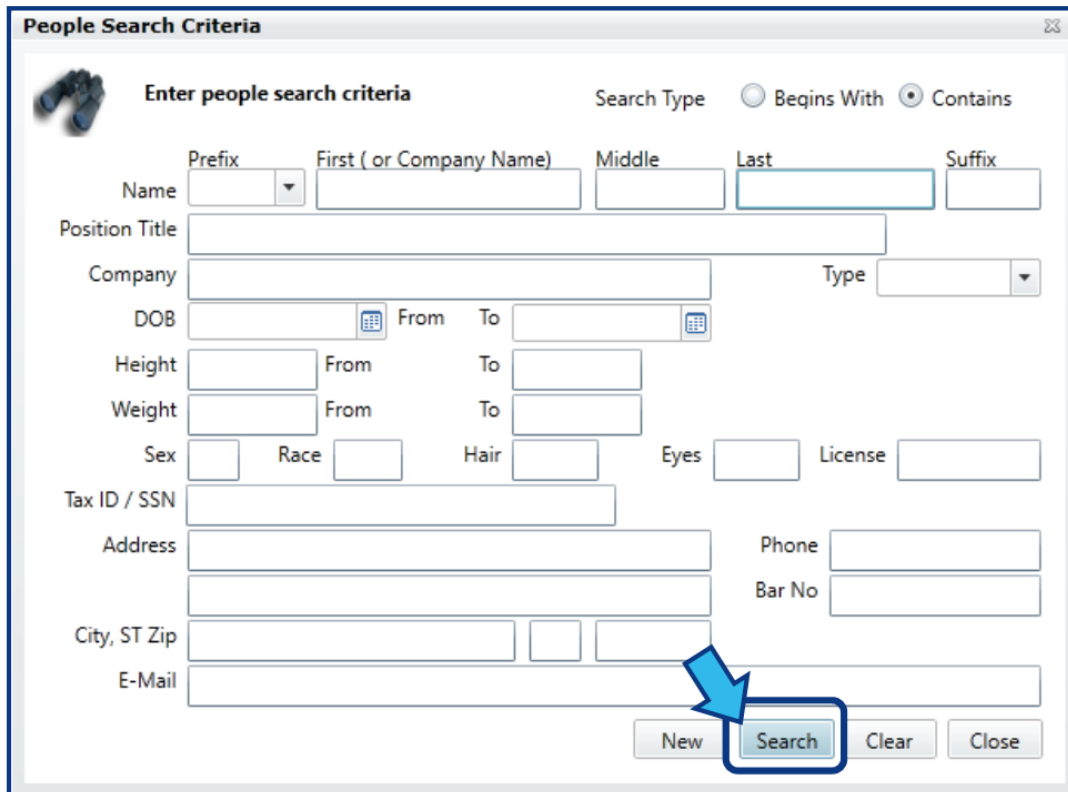
Bar No

City, ST Zip

E-Mail

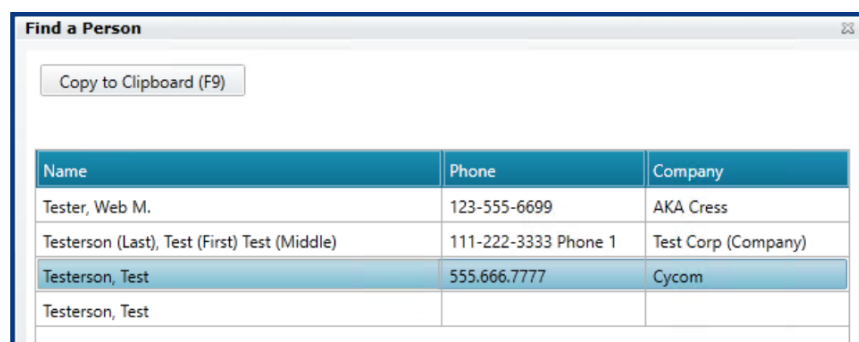
Step 3. Press Search.

The **Search** button is located at the bottom-right of the **People Search Criteria** window.



Step 4. Select contact from search results.

Locate and select the person or firm desired in the **Find a Person** window that appears. A selected contact will be highlighted in blue.



Name	Phone	Company
Tester, Web M.	123-555-6699	AKA Cress
Testerson (Last), Test (First) Test (Middle)	111-222-3333 Phone 1	Test Corp (Company)
Testerson, Test	555.666.7777	Cycom
Testerson, Test		

Step 5. Press Edit or Files to view additional information.

To see additional information for confirmation or identification, press **Edit** or **Files**. **Edit** will cause an **Edit Party** window to appear. From this window, the contact may be viewed or edited.



Files will cause a **Matters** window to appear displaying all the matters on which this person was associated.

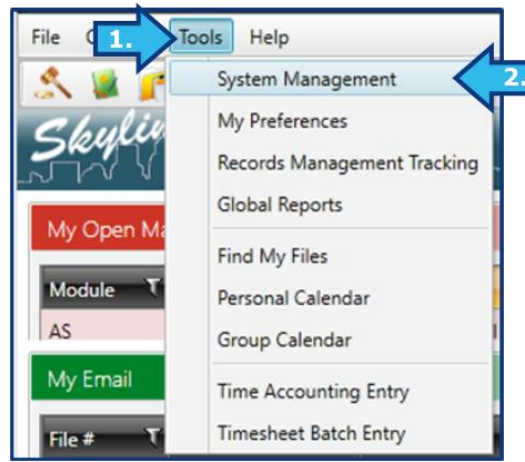


Using System Management**Step 1. Open System Management.**

On the **Global Toolbar**, press the **System Management** icon.



Alternatively, on the **Menu Bar**, select **Tools** and then **System Management**.



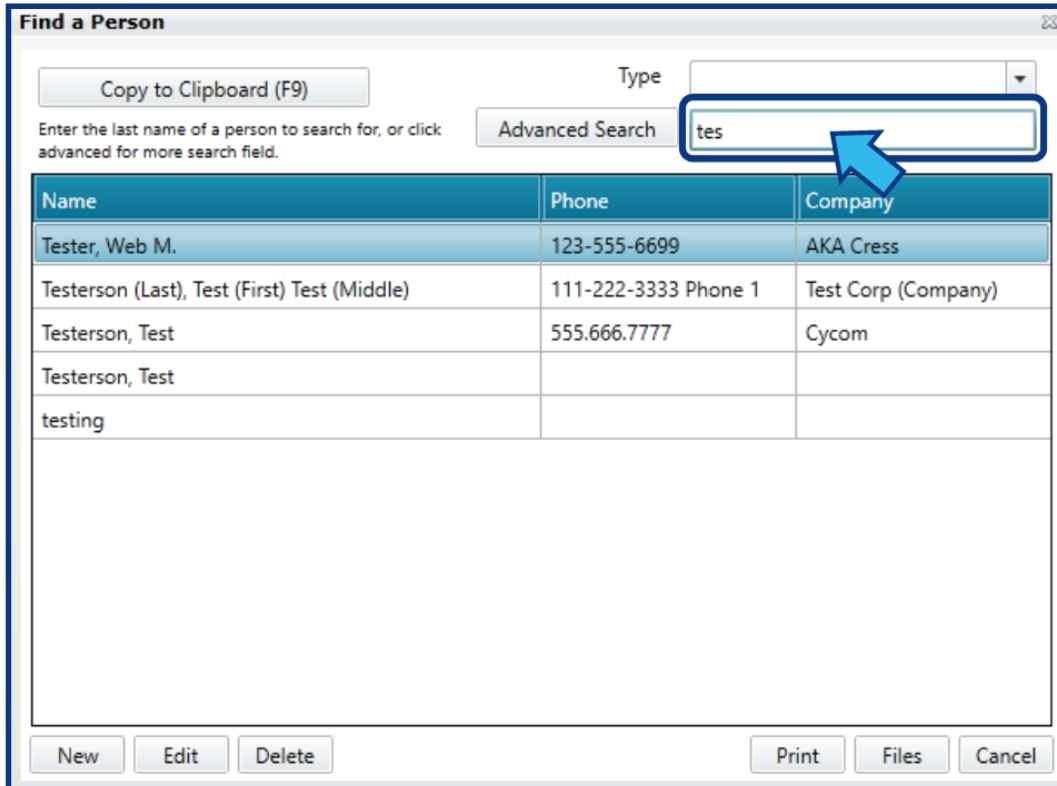
Step 2. Select People.

Select the box next to **People**, located in the middle near the bottom. A **Find a Person** window will appear.

<input type="checkbox"/> Calendar Types	<input type="checkbox"/> Vendor	<input type="checkbox"/> Vendor Object Codes
<input type="checkbox"/> Holidays	<input type="checkbox"/> Outside Counsel	
<input type="checkbox"/> Note Types	<input type="checkbox"/> Other Staff	
	<input type="checkbox"/> Enterprise-wide Staff	<input type="checkbox"/> Gang Codes
<input type="checkbox"/> Retention Class	<input checked="" type="checkbox"/> People	<input type="checkbox"/> Clique Codes
<input type="checkbox"/> Insurance Funds	<input type="checkbox"/> People Types	<input type="checkbox"/> Council Dist
	<input type="checkbox"/> Consolidate People	<input type="checkbox"/> Payment Type

Step 3. Enter search criteria.

Begin typing a last name or firm name, if known.

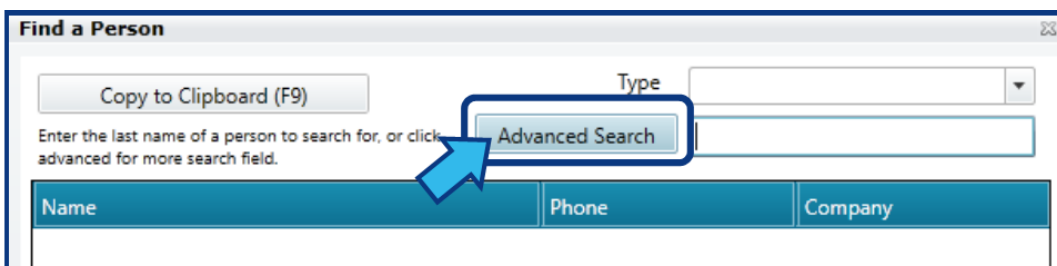


The screenshot shows the 'Find a Person' window with a search box containing 'tes'. A blue arrow points to the search box. Below the search box is a table with three columns: Name, Phone, and Company.

Name	Phone	Company
Tester, Web M.	123-555-6699	AKA Cress
Testerson (Last), Test (First) Test (Middle)	111-222-3333 Phone 1	Test Corp (Company)
Testerson, Test	555.666.7777	Cycom
Testerson, Test		
testing		

Buttons at the bottom include: Copy to Clipboard (F9), Advanced Search, Type (dropdown), New, Edit, Delete, Print, Files, and Cancel.

Alternatively, press **Advanced Search** to open a **People Search Criteria** window.



The screenshot shows the 'Find a Person' window with the 'Advanced Search' button highlighted by a blue box and a blue arrow pointing to it. The search box is empty. Below the search box is a table with three columns: Name, Phone, and Company.

Name	Phone	Company
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Buttons at the bottom include: Copy to Clipboard (F9), Advanced Search, Type (dropdown), New, Edit, Delete, Print, Files, and Cancel.

Step 5. Press Edit or Files to view additional information.

To see additional information for confirmation or identification, press **Edit** or **Files**. **Edit** will cause an **Edit Party** window to appear. From this window, the contact may be viewed or edited.



Files will cause a **Matters** window to appear displaying all the matters on which this person was associated.

