

There are 10 steps to complete this task:

1. Open the System Management module.
2. Select Outside Counsel.
3. Press New in the Outside Counsel Maintenance window.
4. Fill in the mandatory fields.
5. Press Modules... in the Maintain Outside Counsel Records window.
6. Check the Modules to include.
7. Press Save in the Modules window.
8. Press Save in the Maintain Outside Counsel Records window.
9. Press Close in the Outside Counsel Maintenance window.
10. Press Close in the System Management window.

Once these steps are complete, the new **Outside Counsel** record should appear as expected. Users may have to exit and restart **CLW** to see the changes.

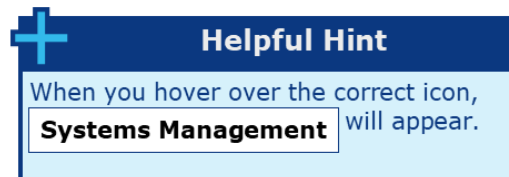
## Standard Guide

### Step 1. Open the System Management module.

There are two ways to open this module.

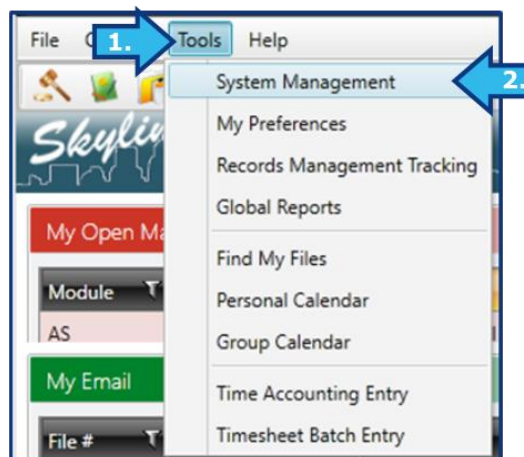
#### 1-Step Option:

Press the **System Management** icon on the **Global Toolbar**.



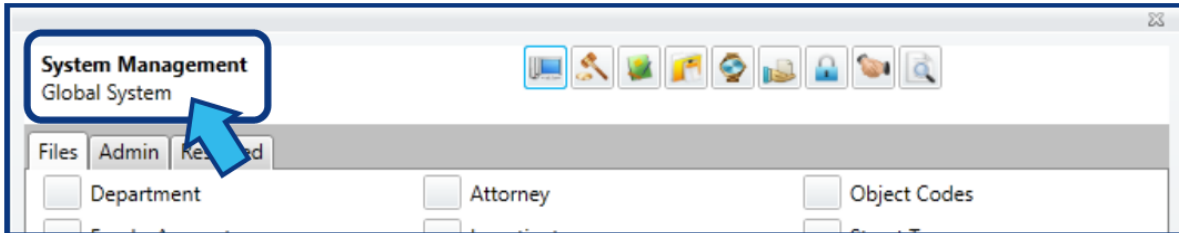
#### 2-Step Option:

1. On the **Menu Bar**, press **Tools**.
2. Press **System Management**.

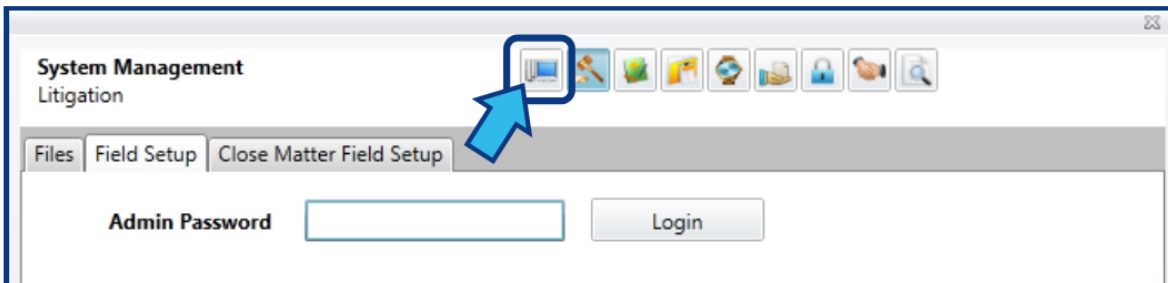


## Step 2. Select Outside Counsel.

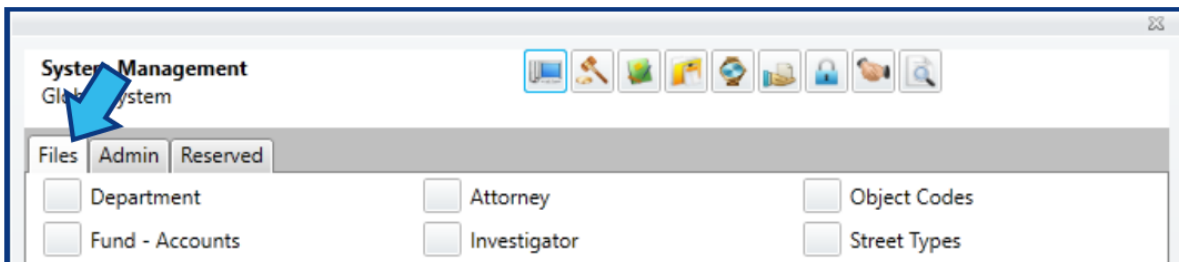
On first opening **System Management, Global System** should be the default module selected and should be listed under the **System Management** heading.



If not, press the **Global System** icon.



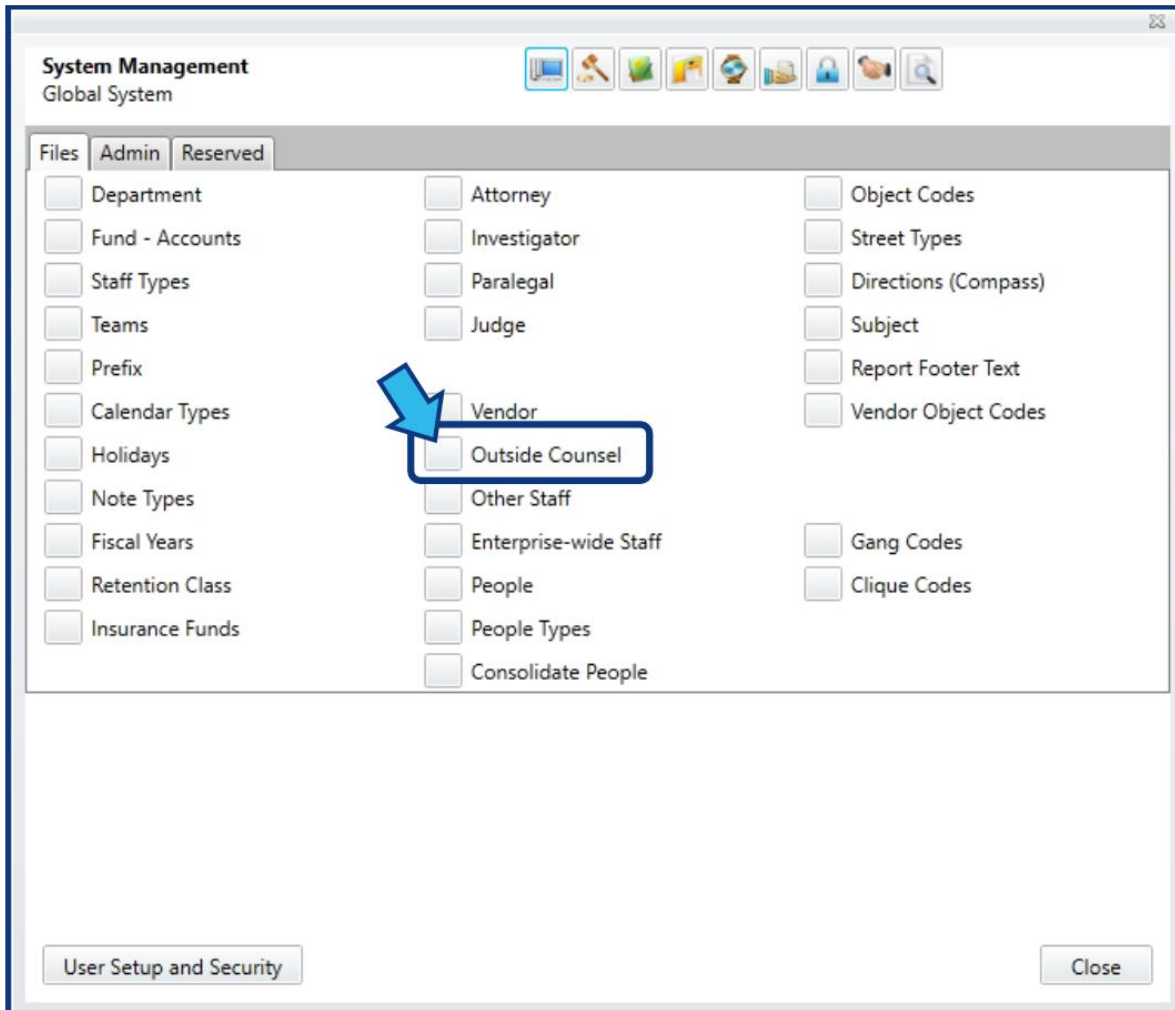
The **Files** tab should be selected by default.



If not, select the **Files** tab.

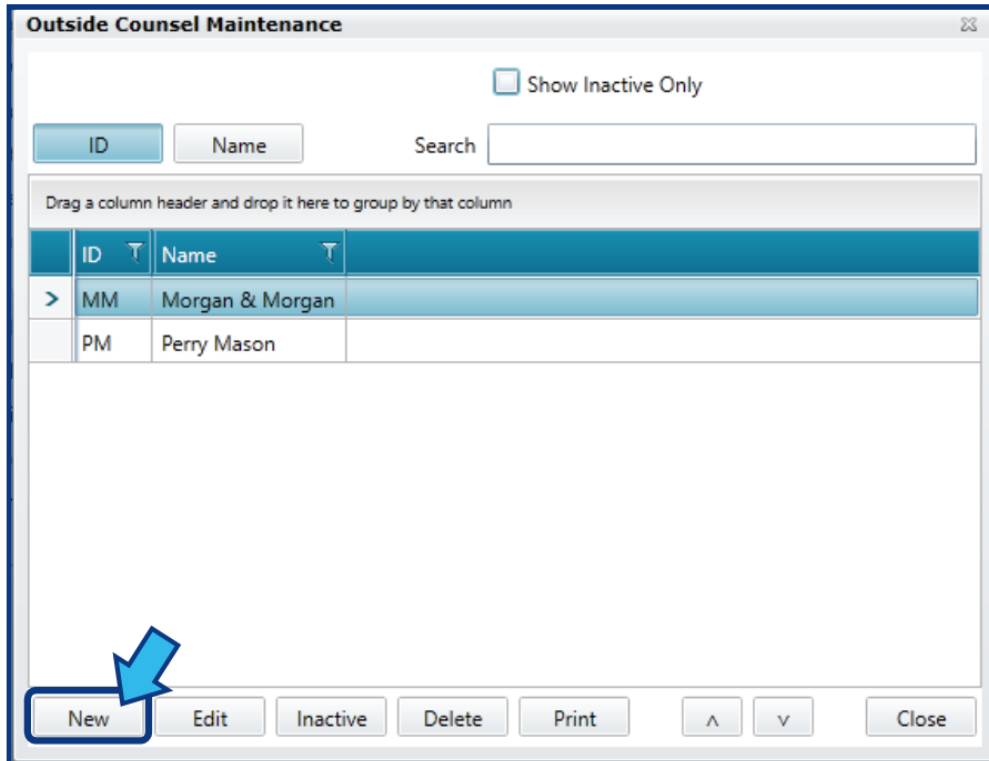


Press the selection box beside **Outside Counsel**, which is located near the middle of the window.



**Step 3. In the Outside Counsel Maintenance window, press New.**

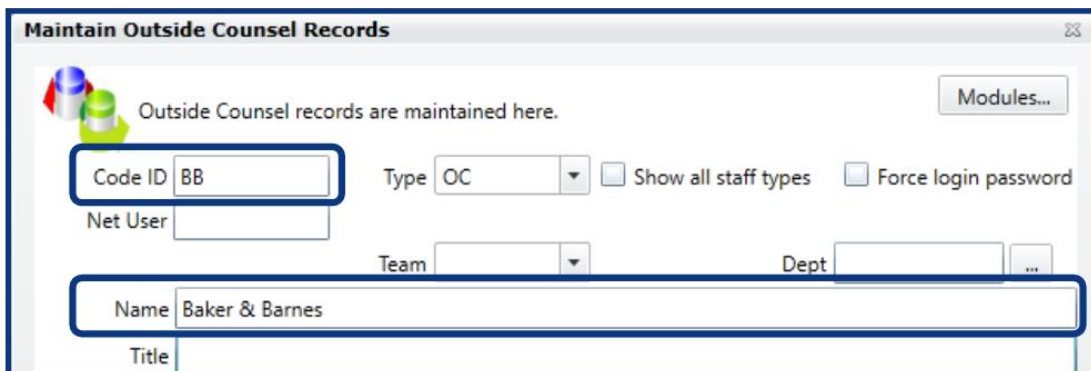
After completing **Step 2**, an **Outside Counsel Maintenance** window appears. Press **New** in the bottom-left corner of the window.



| ID   | Name            |
|------|-----------------|
| > MM | Morgan & Morgan |
| PM   | Perry Mason     |

**Step 4. Fill in the mandatory fields.**

In order to save a new **Outside Counsel** record, a **Code ID** and **Name** must be entered.



Code ID  Type   Show all staff types  Force login password

Net User

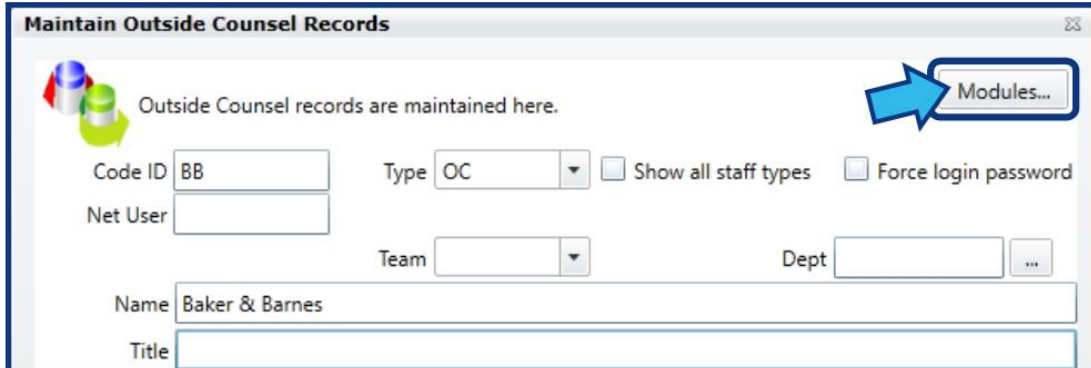
Team  Dept

Name

Title

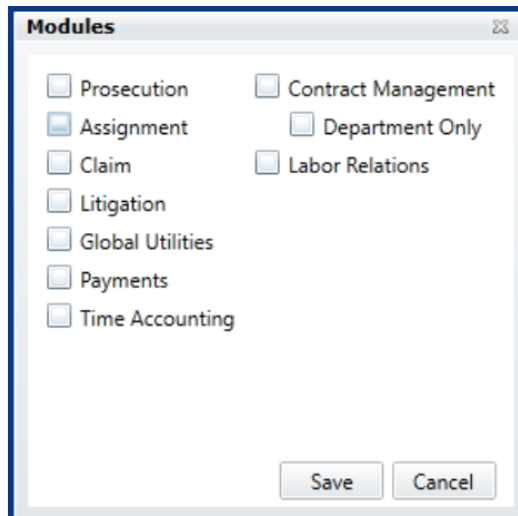
### Step 5. In the Maintain Outside Counsel Records window, press **Modules...**

The **Modules...** button is located in the top-right corner of the **Maintain Outside Counsel Records** window.



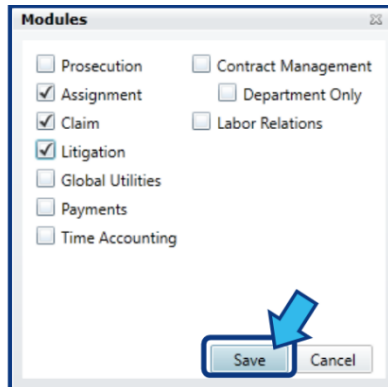
### Step 6. In the Modules window, check the Modules to include.

Put a check beside each module that should have access to this **Outside Counsel** record. By default, none of the modules are selected. If none are selected, this **Outside Counsel** record will not appear in any module.

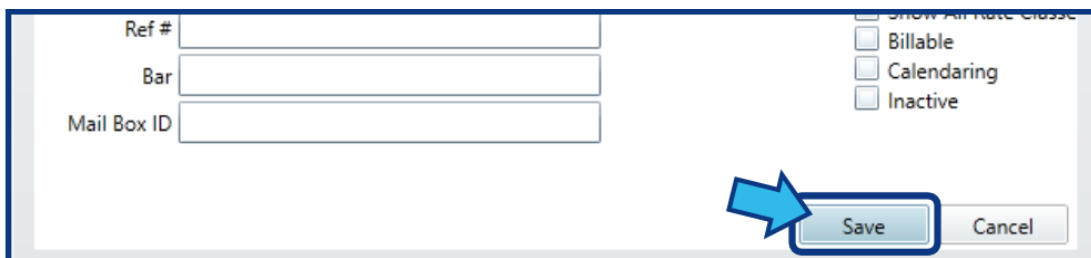


**Step 7. In the Modules window, press Save.**

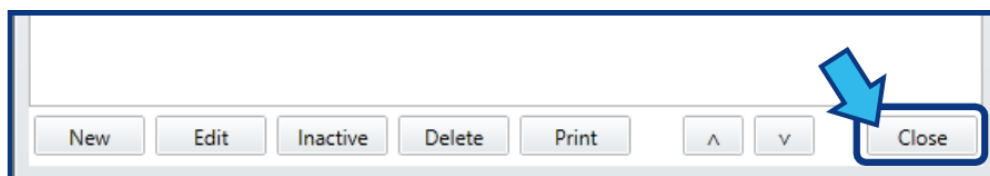
After checking the appropriate modules, press the **Save** button located in the bottom-right of the **Modules** window.

**Step 8. In the Maintain Outside Counsel Records window, press Save.**

Press the **Save** button located in the bottom-right corner of the **Maintain Outside Counsel Records** window.

**Step 9. In the Outside Counsel Maintenance window, press Close.**

The new **Outside Counsel** record will not yet be visible. Press the **Close** button located in the bottom-right corner of the **Outside Counsel Maintenance** window.



**Step 10. In the System Management window, press Close.**

Press the **Close** button located in the bottom-right corner of the **System Management** window.

