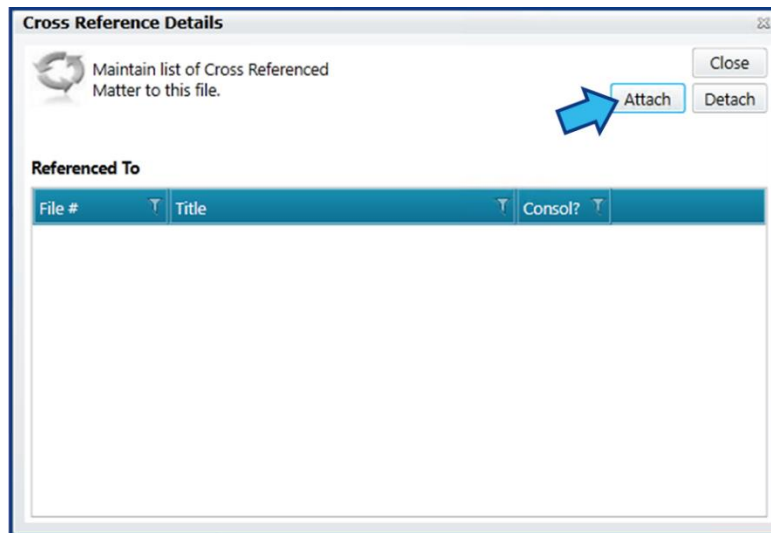


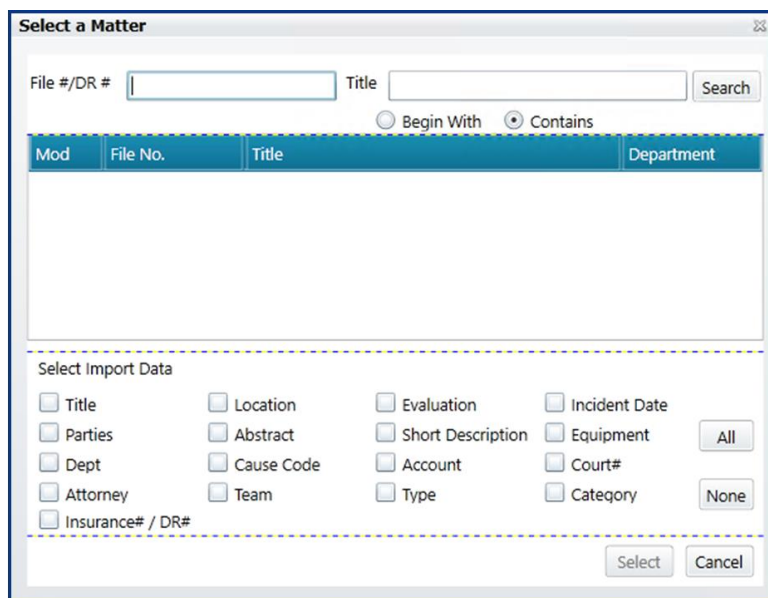
In some modules, such as **Litigation** and **Assignments**, the **Basic** tab of a matter allows the user to manage cross references. Press the ellipsis button to the right of the **Cross Ref** field.



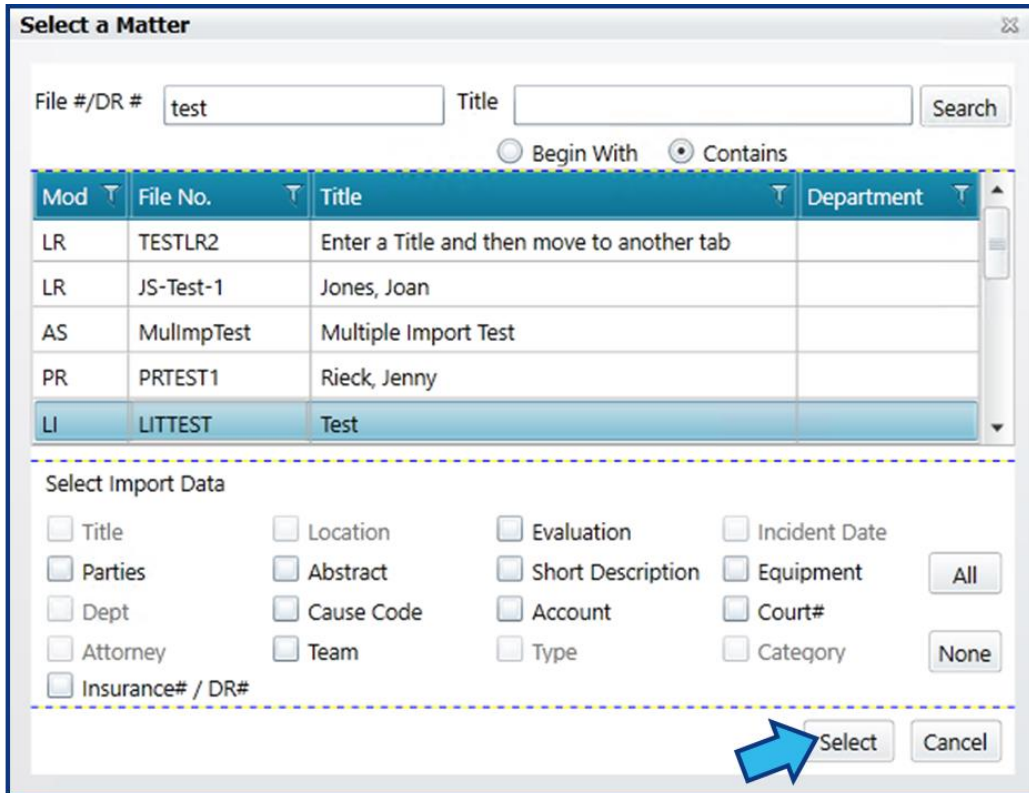
The **Cross Reference Details** window will open, displaying a list of the cross-referenced matters, if any.



Press the **Attach** button to add a matter to the list.



Search for the matter by **File Number**, **DR#**, or **Title** using the **Search** fields at the top. Once you locate the matter, select it in the list. It will appear highlighted in blue. At this point you may also select data to import from the cross-referenced matter to the current matter. This is especially useful when consolidating matters. Once you have made your selections, press the **Select** button in the lower right corner.



Select a Matter

File #/DR # Title Search

Begin With Contains

Mod	File No.	Title	Department
LR	TESTLR2	Enter a Title and then move to another tab	
LR	JS-Test-1	Jones, Joan	
AS	MullmpTest	Multiple Import Test	
PR	PRTEST1	Rieck, Jenny	
LI	LITTEST	Test	

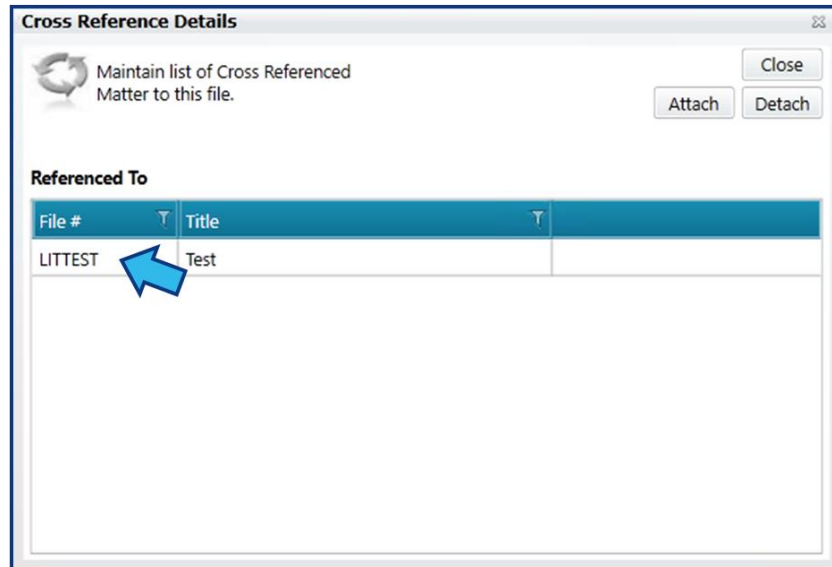
Select Import Data

Title Location Evaluation Incident Date
 Parties Abstract Short Description Equipment All
 Dept Cause Code Account Court# None
 Attorney Team Type Category
 Insurance# / DR#

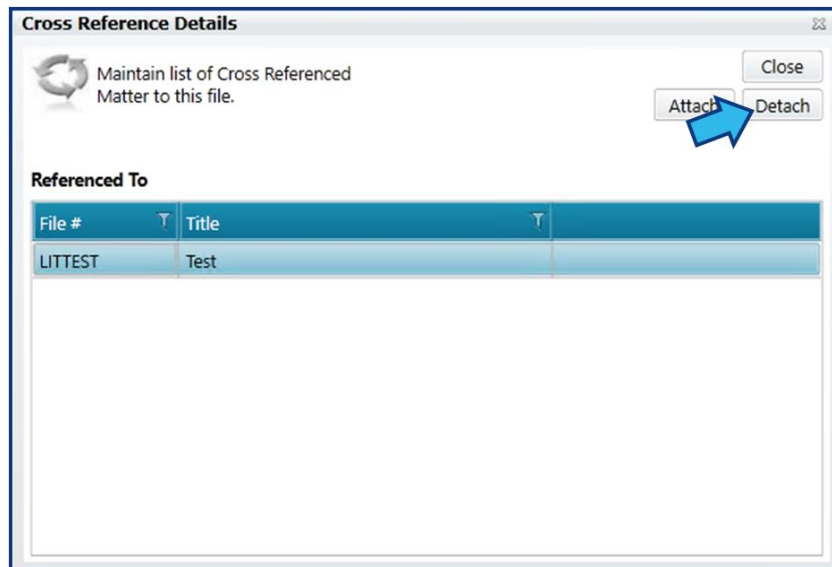
Select **Cancel**

NOTE: The fields which are available for import are module-specific. Some modules, such as **Claims** and **Litigation**, do allow you to import data from other modules, but this is very limited.

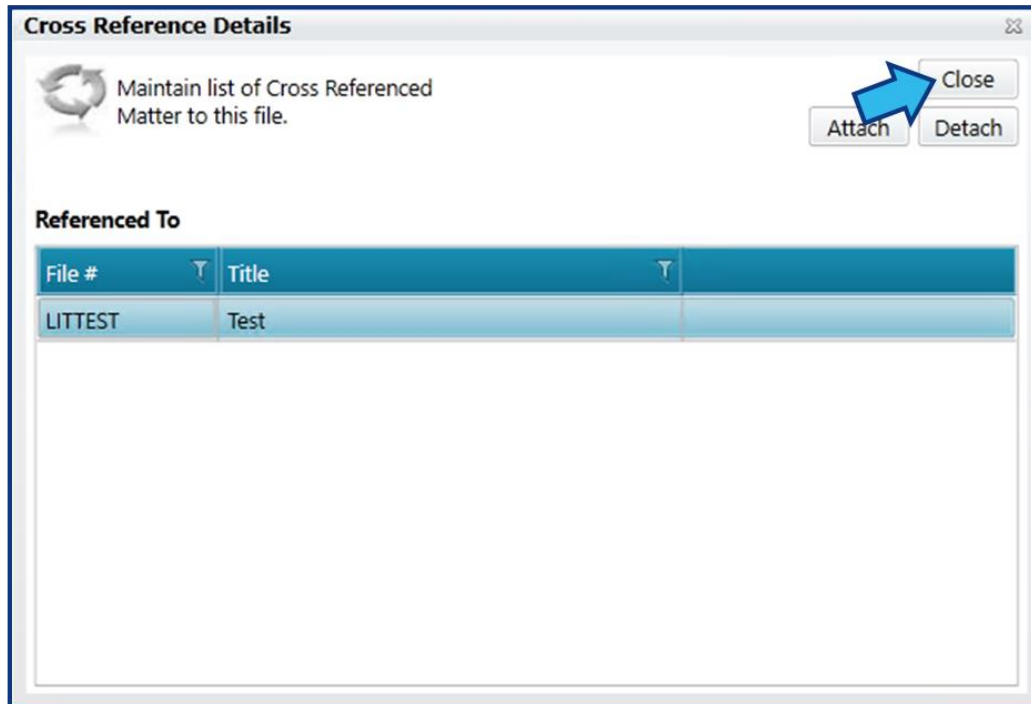
The matter you have just selected is now added to the list in the **Cross Reference Details** window.



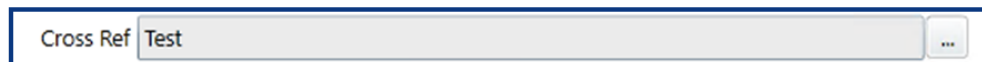
If you wish to remove a cross-referenced matter, select it in this list so that it appears highlighted in blue and then select the **Detach** button in the top right corner.



Once you are finished attaching and/or detaching matters, select **Close** in the top right corner.



In the **Basic** tab, in the **Cross Ref** field, any cross-referenced matter will be noted by its **Title**. NOTE: When more than one matter is cross-referenced on a matter, the **Cross Ref** field will display "**Multiple Matters**" in the field.



In all cases, to review any cross-referenced matters, select the ellipsis button for the **Cross Ref** field and then double-click the cross-referenced matter in the **Cross Reference Details** window to open that matter.