# WELCOME !



### Thanks for taking a few minutes for a quick tour.

CMPv3.8 is the latest leading-edge release by Lucid IQ - the third generation server-based, browser operated, SQL-Server platform since the 2001 original.

Designed to manage the complexity and volume of the largest mass-tort actions in the US, CaseManagerPro's solid data platform proved ideal for supporting the flexibility needed to adapt to virtually any practice.

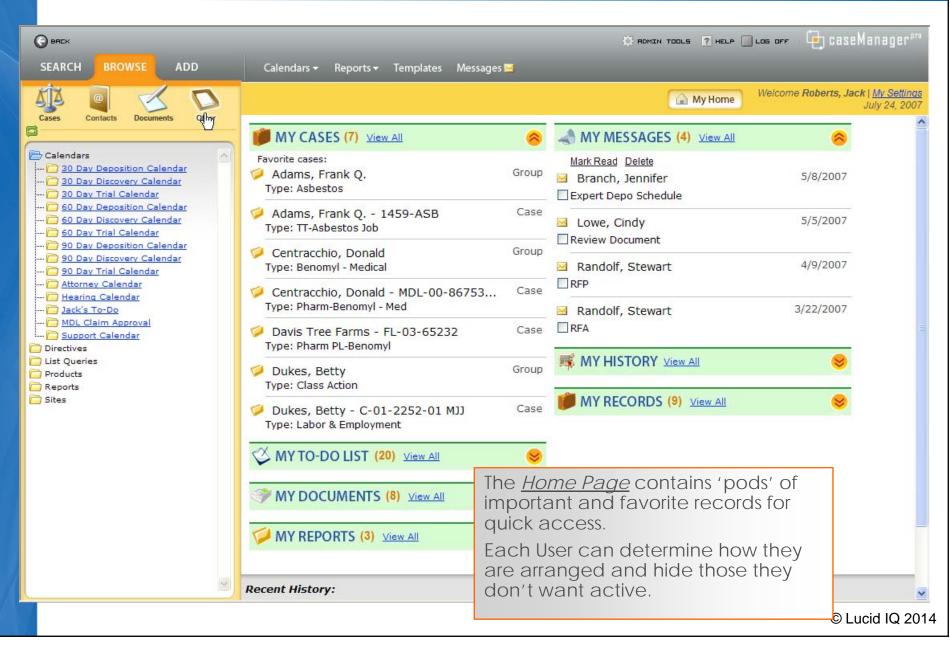
Whether simple or complex, choose from a variety of tools and options to create the practice environment to meet your objectives, your way.

This series of annotated screen shots highlights the organization, ease of use, and key features that translate to better, more effective legal practices.

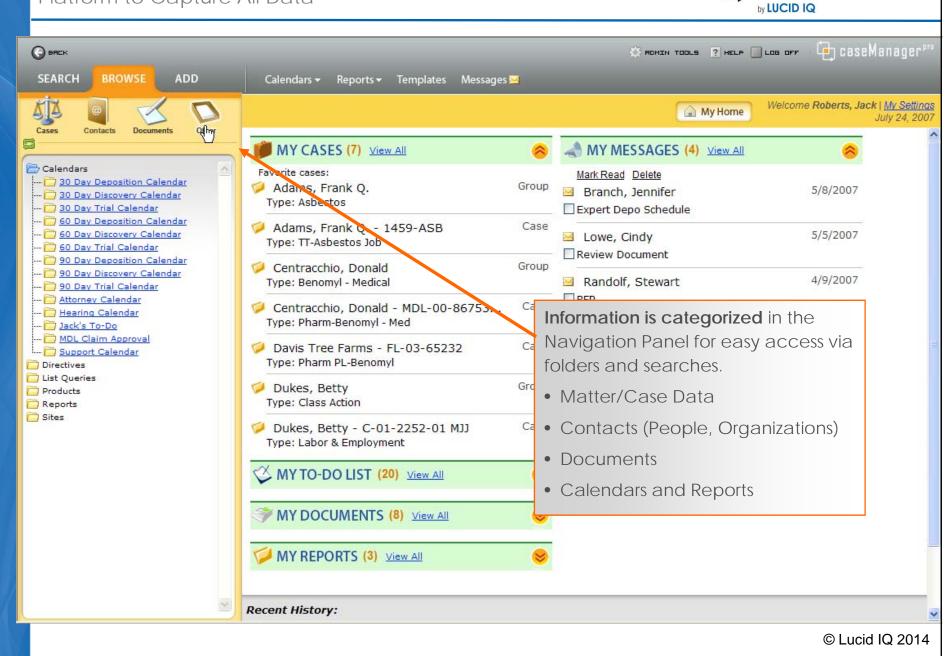
Thank you!

#### **Home Page** Folder navigation and key records





### Home Page Platform to Capture All Data



7 caseManager<sup>pro</sup>

#### **Primary Data Areas** Custom Case Types

BRCK SEARCH

Cases

Cases

Contacts

Recent Cases

Class Action

- 🦳 Mesothelioma

Real Estate

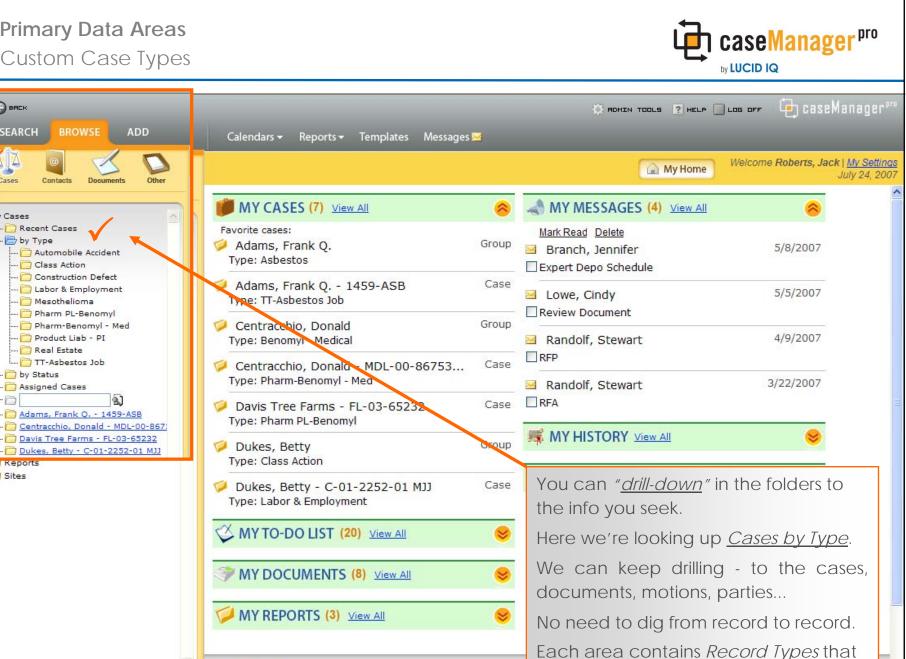
Assigned Cases

**Recent History:** 

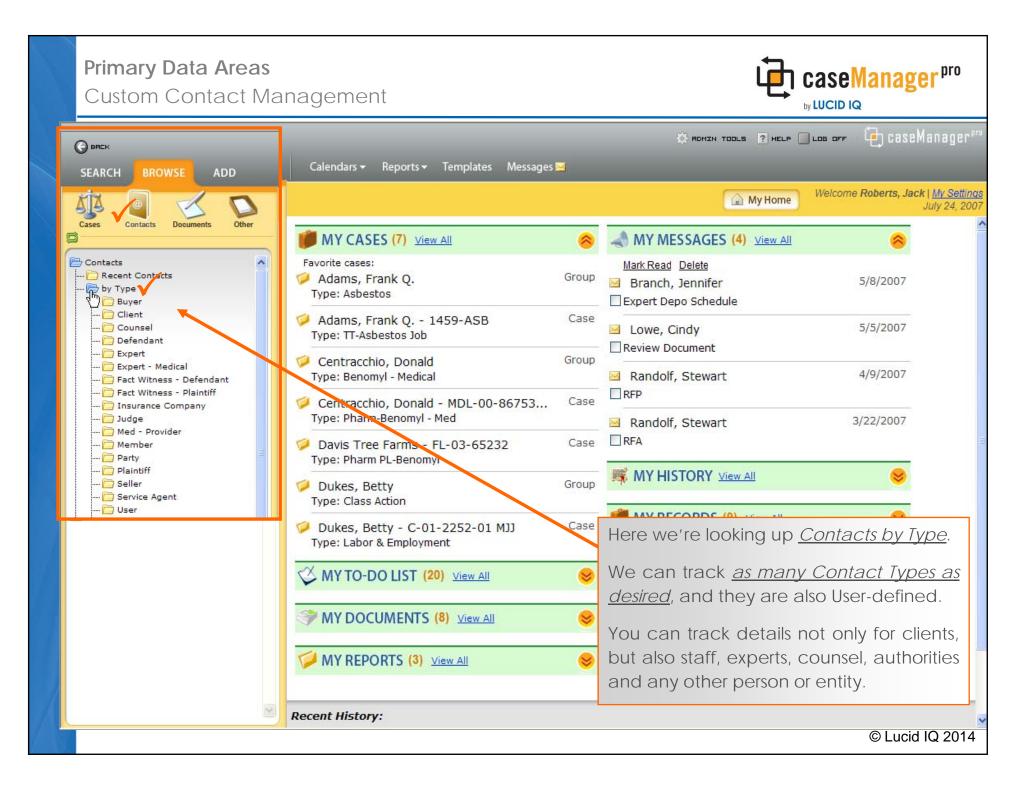
by Status

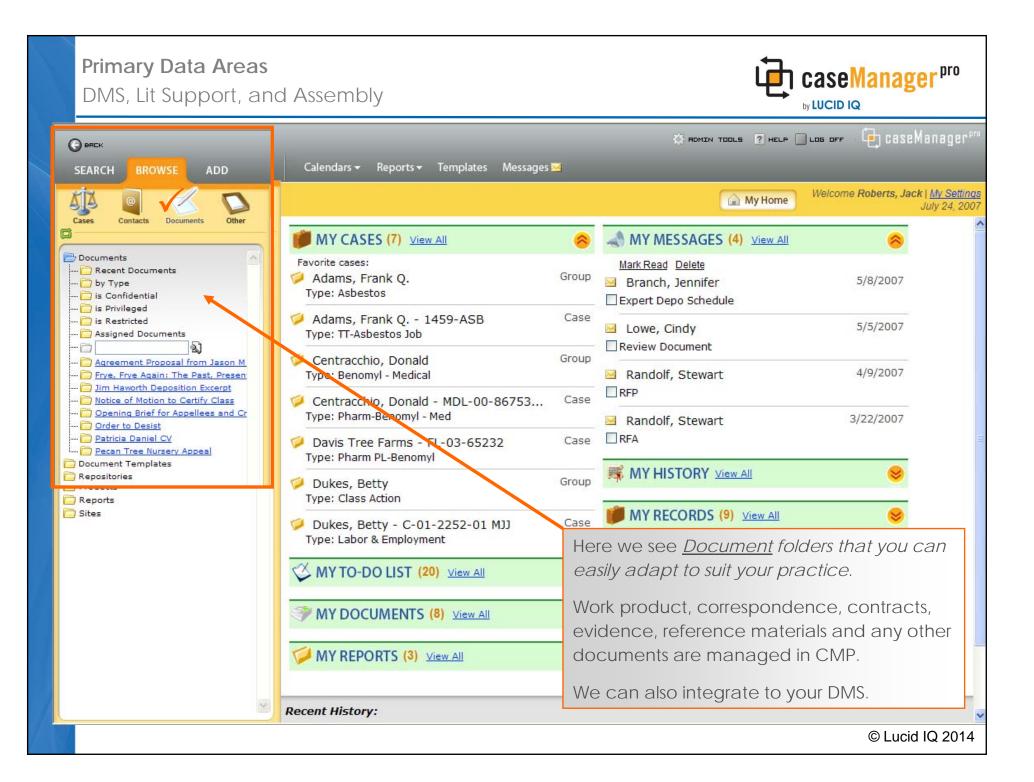
Keports C Sites

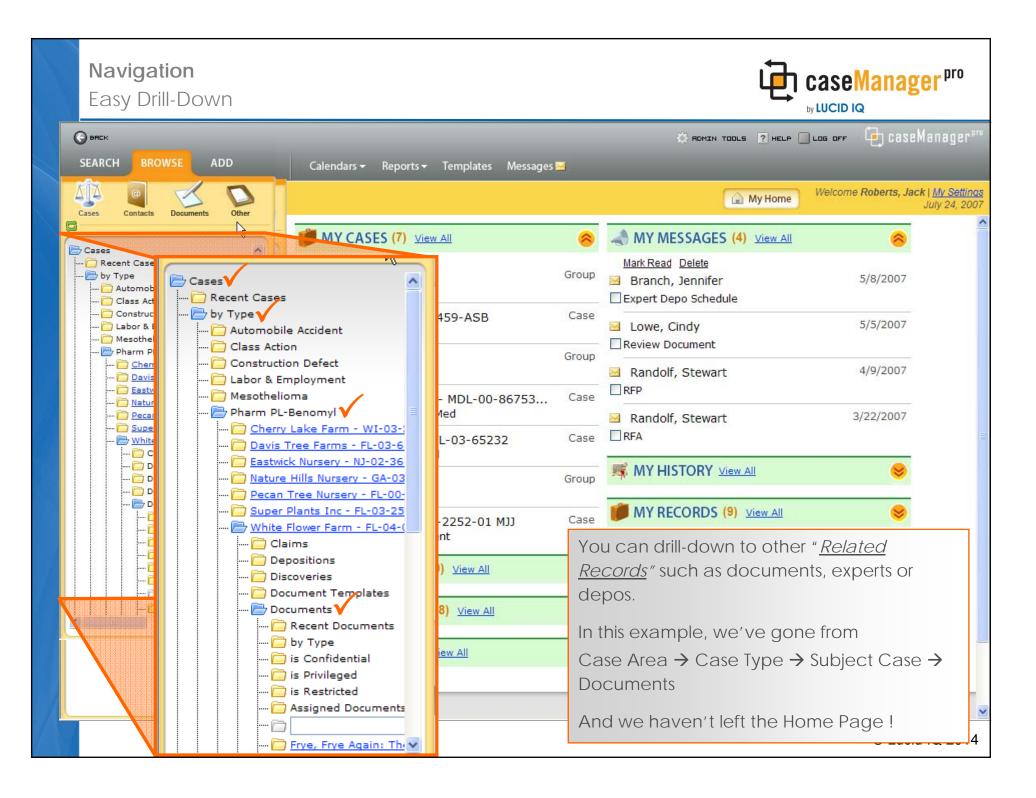
by Type



you define.







#### **Navigation** caseManager<sup>pro</sup> Related Records from Primary Record hy LUCID IQ 🔅 ROMIN TOOLS 😨 HELP 🔄 LOS OFF 🛛 📮 CASEMANAGER''' G BRCK SEARCH ADD Calendars - Reports - Templates Messages 🖂 Welcome Roberts, Jack | My Settings Centracchio, Donald - MDL-00-8675309-01 A My Home Cases Contacts Other 💌 🖶 NEW 🧭 EDIT 💥 CLOSE Case Actions: Centracchio, Donald - MDL-00-8675309-01 Cases Recent Cases Primary Background Party Litigation Workflow Custom by Type - 🗁 Automobile Accident Class Action Centracchio, Donald - MDL-00-8675309-01 Title: CASE NUMBERS Construction Defect Case Type: Pharm-Benomyl - Med 🗁 Labor & Employment Type Number Mesothelioma Status: Active Cause Number 1234 Pharm PL-Benomyl Pharm-Benomyl - Med 🕻 Georgia Northern District Court - 11th Circuit Jurisdiction: Plaintiff Number MDL-00-8675309-01 --- 🗁 Centracchio, Doglald - MDL-1 Date Opened: October 07, 2000 --- 🗁 Foster, Theresa MDL-00-8 COMMENTS - 🛅 Guthrie, Mike - MDL-00-867 Date Closed: Kozior, France - MDL-00-86 Please alert Cindy Lowe of any communications between this firm and Global • McIrvin, Mary - MDL-00-867 CASE PARTIES Chemical. Record in contact log and send Cindy a direct message - Cindy - MDL-00-8675 --- Patterson, Frank - MDL-00-Role Party Open Client Primary Sigmund, Gene - MDL-00-8 - 🛅 Wilson, Jane - MDL-00-867 📮 Farm Industries Inc 🕧 Defendant Yes Yes No -Product Liab - PI 🔁 Real Estate Defendant Glob No TT-Asbestos Job Claims D by Status Center Contact Logs Plaintiff Yes Assigned Cases Depositions 2 Direct Messages Adams, Frank Q. - 1459-ASB **KEY DATES** Directives Centracchio, Donald - MDL-00-867 By clicking on a Home page link, we've Key Da Discoveries McIrvin, Mary - MDL-00-867 Document Templates 1 Discov 007 moved to a Case Record. • Mohr, Cindy - MDL-00-8675 Documents - 🗁 Patterson, Frank - MDL-00-1 1 008 Trial Da - 🗁 Sigmund, Gene - MDL-00-8 Groups Wilson, Jane - MDL-00-867 1 Compl Liens 005 At the bottom of every Record - not just 🚞 Product Liab - PI List Queries 🚞 Real Estate - 🧰 TT-Asbestos Job Motions Cases - is a *Related Records* menu. 📄 by Status Notes SECURITY CLAS Assigned Cases Other Cases 2] Internal

Reports

Services

RELATED RECOR

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Repositories

¥

🚞 <u>Adams, Frank Q. - 1459-ASE</u>

Centracchio, Donald - MDL-00-867.

🛅 <u>Davis Tree Farms - FL-03-65232</u>

Dukes, Betty - C-01-2252-01 MJJ

From here, simply select what Record type you're seeking from a list...

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August 17, 200

Primary

No

Yes

### Navigation

### Related Records from Primary Record



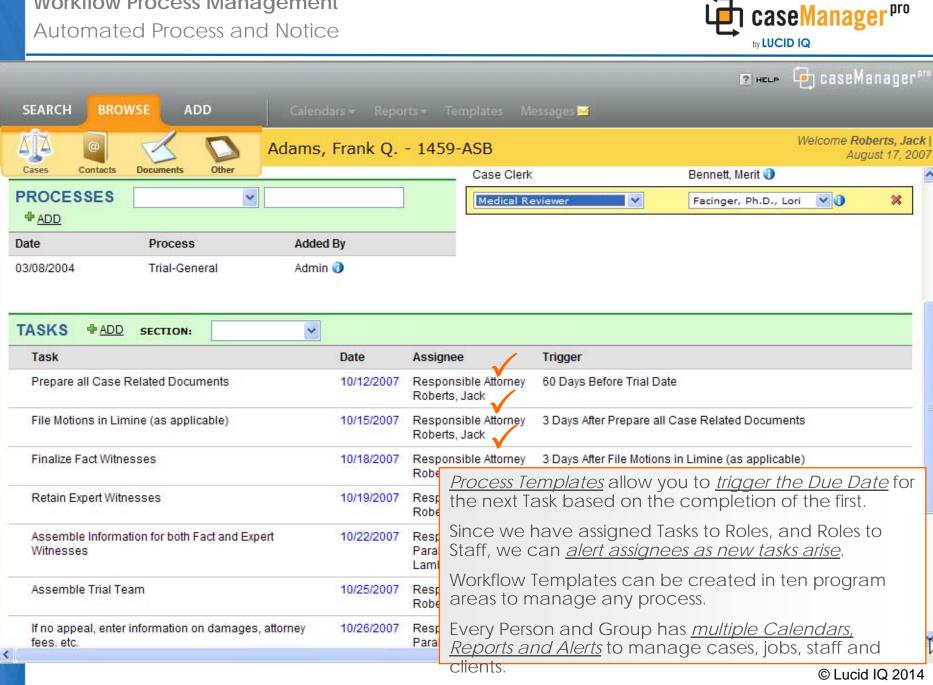
| REL      | ATED RECOR  | DS Document                   | ts         | Filter (1-20 of 20+)  |   |            |                   |             | ₽               |
|----------|---|-------------------------------|------------|---|---|------------|-------------------|-------------|-----------------|
|          | Title   | Туре                          | Date       | Description   |   | Contact    | Confidential      | Privileged  | Restricted      |
| 7        | New Doc   |                               | 07/26/2007 |   |   |            | No                | No          | No              |
| ₽        | <u>Centracchio,</u><br><u>Donald-1st Set of</u><br>Interrogatories  | 1st Set of<br>Interrogatories | 03/07/2005 |   |   |            | Yes               | No          | Yes             |
| Z        | <u>Global Chemical.</u><br>Inc. 2nd Quarter<br>2005 10Q   | Corporate<br>Record           | 12/21/2006 | Quarterly report which provides a continu<br>company's financial position   | ing view of a                                 |            | Yes               | No          | Yes             |
|          | Global Chemical<br>Inc. 2004 10K  | Corporate<br>Record           | 07/21/2006 | Annual Report which provides a compret<br>the company for the past year   | nensive overview of                           |            | Yes               | Yes         | No              |
| W        | <u>Global Chemical</u><br><u>Company, Inc</u><br><u>Profile</u>   | Corporate<br>Record           | 09/07/2001 |   |   |            | Yes               | No          | Yes             |
| R        | Opinion<br>Regarding<br>Defendant's<br>Motions to<br>Exclude Plaintiffs'<br>Expert Witnesses<br>and for Summary | Court Opinion                 | 12/24/2006 | For the foregoing reasons, the Court enter<br>relative to Drs. Patton, Howard and McInte<br>2005. It was based upon the May 9 order<br>defendant's motion for summary judgme<br>that same date. There was no need as a<br>to a trial on the merits. |   | Yes        | No                | Yes         |                 |
|          | Judgment  |                               |            | to a that on the ments.   | You can ge                                    | t a list c | Records s         | such as     |                 |
| <b>P</b> | <u>Opinion RE:</u><br><u>Privilege</u><br>Documents   | Court Opinion                 | 11/24/2001 | Appeal by nonparties from district court o<br>nonparties produce documents. REVER:  | documents,<br>page of the                     |            | or contac         | t logs, fro | m every         |
|          | Motion for  |                               |            |   | For docume                                    | ents, yo   | u can <u>prev</u> | view the c  | content,        |
|          |   |                               |            |   | <u>click the link</u><br><u>the icon</u> to c | - ·        |                   |             | or <u>click</u> |
|          |   |                               |            |   |   |            |                   |             |                 |

| Case Record<br>Multiple Parti  | <b>ls</b><br>ies and Quick C               | ontact               |            |   |  | Manager <sup>pro</sup>   |  |  |  |  |  |
|--|--|----------------------|------------|---|--|--|--|--|--|--|--|
| ase  |  | racchio, D           | onald - MD | ⇔ nplates Messages<br>L-00-8675309-01<br>Actions:   | My Home Welcome Ro   | berts, Jack   <u>My Settin</u><br>August 17, 20<br>W @EDIT X CLOSE |  |  |  |  |  |
| Primary       Background       Party       Litigation       Workflow       Custom         Title:       Centracchio, Donald - MDL-00-8675309-01       CASE NUMBERS         Case Type:       Pharm-Benomyl - Med       Type       Number       Primary |  |                      |            |   |  |  |  |  |  |  |  |
| Status: Activ  |  |                      |            | Type<br>Cause Number  | Number<br>1234   | Primary<br>No  |  |  |  |  |  |
| Jurisdiction: 💊 Geo  | rgia Northern District Cou                 | urt - 11th Circ      | uit        | Plaintiff Number  | MDL-00-8675309-01  | Yes  |  |  |  |  |  |
| Date Opened: Octo<br>Date Closed:  | ober 07, 2000                              |                      | Ī          | COMMENTS  |  |  |  |  |  |  |  |
| CASE PARTIES Please alert Cindy Lowe of any communications between this firm and Global Chemical. Record in contact log and send Cindy a direct message  |  |                      |            |   |  |  |  |  |  |  |  |
| CASE PARTIES   |  |                      |            | onemical: record in con   | acting and send cindy a direct messi   | age  |  |  |  |  |  |
| Role Party   | Open<br>dustries Inc 🕐 Yes                 | Client Pri<br>Yes No | imary      | Each case ca  | n manage <u>any number</u><br>heir Party Contacts.   |  |  |  |  |  |  |
| Role Party<br>Defendant Sarm Inc   |  |                      |            | Each case cat<br>" <u>Parties</u> " and t   | n manage <u>any number</u>   | <u>of</u>  |  |  |  |  |  |
| Role Party<br>Defendant Sarm Ind<br>Defendant Global C   | dustries Inc 🜒 Yes                         | Yes No               |            | Each case can<br>" <u>Parties</u> " and t<br>The <u>role of the</u><br>based on the<br>Real Estate tra                                    | n manage <u>any number</u><br>heir Party Contacts.<br><u>Party</u> is determined by to<br>practice – for instance,<br>nsactions need <u>Buyers a</u> | <u>of</u><br>the User  |  |  |  |  |  |
| Role Party<br>Defendant Sarm Ind<br>Defendant Global C   | dustries Inc 🜒 Yes<br>Chemical, Inc. 🌒 Yes | Yes No<br>Yes No     |            | Each case can<br>" <u>Parties</u> " and t<br>The <u>role of the</u><br>based on the<br>Real Estate tra                                    | n manage <u>any number</u><br>heir Party Contacts.<br><u>Party</u> is determined by to<br>practice – for instance,                                   | <u>of</u><br>the User  |  |  |  |  |  |
| Role Party<br>Defendant Q Farm Ind<br>Defendant Q Global C<br>Plaintiff Q Centract   | dustries Inc 🜒 Yes<br>Chemical, Inc. 🌒 Yes | Yes No<br>Yes No     |            | Each case can<br>" <u>Parties</u> " and t<br>The <u>role of the</u><br>based on the<br>Real Estate tra<br><u>Sellers</u> , not <u>Pla</u> | n manage <u>any number</u><br>heir Party Contacts.<br><u>Party</u> is determined by to<br>practice – for instance,<br>nsactions need <u>Buyers a</u> | <u>of</u><br>the User  |  |  |  |  |  |

#### **Case Records** caseManager<sup>pro</sup> Content-Driven Data Fields by LUCID IQ 🔄 caseManager 🕞 өнск ROMIN TOOLS ? HELP LOG OFF SEARCH BROWSE ADD Calendars - Reports - Templates Messages 🖂 Welcome Roberts, Jack | My Setting $\Delta$ Adams, Frank Q. - 1459-ASB A My Home August 17, 200 Cases Contacts Other Actions: V NEW CLOSE Case Adams, Frank Q. - 1459-ASB Custom Data Sections can be added based on the record type and content. Primary Background Party Litigation Workflow Custom Custom Sections are user-defined using a Adams, Frank Q. ¥ 0 Select a Party: large array of field types. Select an Area: Medical v When you go to any record - cases, documents, contacts - the form and data fields that you need are there. PARTY INFORMATION: MEDICAL B-Read Information B-Read Interpreted By Peters, Edward S. Date of Reading April 20, 2005 **B-Read Interpreted For** Date Received May 19, 2005 Plaintiff Date of X-Ray October 11, 2000 Dust Type Mixed Dust **Film Quality** 2 Large Opacities A Lung Zones Bilateral Profusion 0/1 Abnormality Zones Other Pleural Abnormalities Calcification Other Abnormality Zones cv Comments Left lung mass (lingula) © Lucid IQ 2014

#### Workflow Process Management caseManager<sup>pro</sup> Key Dates and Staffing by LUCID IQ 🔄 🔄 caseManager 🕬 ? HELP BROWSE SEARCH ADD Calendars - Reports - Templates Messages 🖂 Welcome Roberts, Jack Adams, Frank Q. - 1459-ASB August 17, 2007 Other Cases Contacts Documents Workflow Background Party Litigation Custom Primary You are currently editing this page. **KEY DATES** ADD 🖶 STAFFING # ADD V ADD BY GROUP: Key Date Date Role Assignee **Discovery Deadline** 09/13/2007 Responsible Attorney Roberts, Jack 🕖 Trial Date 12/13/2007 Lambert, Sheila 🕕 Responsible Paralegal Complaint Served 07/27/2005 Case Clerk Bennett, Merit 🕧 PROCESSES × v O \* Medical Reviewer V Facinger, Ph.D., Lori ADD Workflow Processes are easily setup by your Date Process Added By staff as templates to standardize Best 03/08/2004 Trial-General Admin 🕕 Practices, docketing, rule compliance, etc. You can assign roles to staff the case to TASKS ADD v SECTION: automate Calendars and Alerts. Task Date Assignee Defined Processes tie Key Dates, Tasks and Prepare all Case Related Documents 10/12/2007 Responsible Attorney Assignments together to manage deadlines, Roberts, Jack workload, status, productivity. File Motions in Limine (as applicable) 10/15/2007 Responsible Attorney Roberts, Jack

#### Workflow Process Management Automated Process and Notice



|       |           |           |           |        | <b>e Calendars</b><br>endars |                      |           |            | Ĺ         | by LUCID IQ   |
|-------|-----------|-----------|-----------|--------|------------------------------|----------------------|-----------|------------|-----------|---|
| 5     | EARCH     | BROV      | VSE A     | DD     | Calendars <del>v</del>       | Reports <del>+</del> | Templates | Messages 🖂 |           |   |
|       | A<br>ases | Contacts  | Documents | Other  |                              |                      |           | ļ          | 🛕 My Home | Welcome <b>Roberts, Jack   <u>My Settings</u><br/>August 17, 2007</b> |
| Sea   | arch an   | nd Filter | Calenda   | rs By: |                              |                      |           | Actions:   |           | NEW 🗱 CLOSE   |
| Title | 2         |           | Type      | *      | Created By                   |                      |           |            |           |   |

#### CALENDAR SEARCH RESULTS (1-14 of 14)

| Title                      | Туре       | Created By       | Date Created  | Description                                    |  |  |  |  |  |  |
|----------------------------|------------|------------------|---|--|--|--|--|--|--|--|
| 30 Day Deposition Calendar | Deposition | Admin            | 06/01/2004  | All Depositions for Today + 30                 |  |  |  |  |  |  |
| 30 Day Discovery Calendar  | Discovery  | Admin            | 06/01/2004  | All Discovery for Today + 30                   |  |  |  |  |  |  |
| 30 Day Trial Calendar      | Trial      | Admin            | 06/01/2004  | All Trial Dates in the Database for Today + 30 |  |  |  |  |  |  |
| 60 Day Deposition Calendar | Deposition | Admin            | 06/01/2004  | All Depositions for Today + 60                 |  |  |  |  |  |  |
| 60 Day Discovery Calendar  | Discovery  | Admin            | 06/01/2004  | All Discovery for Today + 60                   |  |  |  |  |  |  |
| 60 Day Trial Calendar      | Trial      | Admin            | 06/01/2004  | All Trial Dates in the Database for Today + 60 |  |  |  |  |  |  |
| 90 Day Deposition Calendar | Deposition | Admin            | 06/01/2004  | All Depositions for Today + 90                 |  |  |  |  |  |  |
| 90 Day Discovery Calendar  | Discovery  | Admin            | 06/01/2004  | All Discovery for Today + 90                   |  |  |  |  |  |  |
| 90 Day Trial Calendar      | Trial      | Admin            | 06/01/2004  | All Trial Dates in the Database for Today + 90 |  |  |  |  |  |  |
| Attorney Calendar          | Staffing   | Admin The        | Processes assig   | n Tasks that are used for highly refined       |  |  |  |  |  |  |
| Hearing Calendar Hearing   |            | Admin <u>Gro</u> | oup and Project   | pject Calendars that can export to Outlook     |  |  |  |  |  |  |
| Jack's To-Do               |            | Roberts, and     | d reports.  |  |  |  |  |  |  |  |
| MDL Claim Approval         | Claim      | Roberts, The     | These <u>Calendars can be easily configured</u> for any group |  |  |  |  |  |  |  |
| Support Calendar           | Staffing   | Admin Of p       |   |  |  |  |  |  |  |  |

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SEARCH

CLEAR

## Calendar Task List

#### Easy to view and manage



| _   | by LUCID IQ   |                        |       |      |         |       |        |                          |      |        |        |                         |            |           |                                     |                  |                                    |
|---|---|------------------------|-------|------|---------|-------|--------|--------------------------|------|--------|--------|-------------------------|------------|-----------|-------------------------------------|------------------|------------------------------------|
| My Calendar<br>Daily Monthly Criteria Search                        |   |                        |       |      |         |       |        |                          |      |        |        |                         |            |           |                                     |                  |                                    |
| DAILY CALENDAR  |   |                        |       |      |         |       |        |                          |      |        |        |                         |            |           |                                     |                  |                                    |
| Start Date         08/17/2007 <b>« August 2007</b> September 2007 » |   |                        |       |      |         |       |        |                          |      |        |        |                         |            |           |                                     |                  |                                    |
| Days Forward 30   |   |                        |       |      |         | We    |        |                          |      |        |        |                         |            |           |                                     |                  |                                    |
|   |   |                        |       |      | 31<br>7 | 1     | 2<br>9 | 3<br>10                  | 4    | 2      | 3      | 4                       | 5          | 6         | 7                                   | 1                |                                    |
| S   | Show Closed   |                        |       |      | 14      | 15    | 16     | 17                       | 18   | s      | 10     | 11                      | 12         | 13        | 14                                  | 15               |                                    |
|   |   |                        |       |      |         | 22    | 23     | 24                       | 25   | 16     |        | 18                      |            | 20        | 21                                  | 22               |                                    |
|   |   |                        | 26    | 27   | 28      | 29    | 30     | 31                       |      | 23     | _      | 25                      | 26<br>3    | <b>27</b> | 28<br>5                             | <b>29</b><br>6   |                                    |
|   | <u>t All</u> <u>Deselect All</u> ··· <u>O</u><br>ENDAR ITEMS (<br>Due Date Type   |                        |       |      | on Ta   | ancii |        |                          | A    | ssign  | ee     |                         | Statu      | 15        | Area                                | ı I              | Record                             |
|   | <u>08/17/2007</u>   | Hearing for MIL        |       |      |         |       |        |                          | R    | oberts | Jack   |                         | Open       |           | Grou                                | p g              | Centracchio, Donald                |
|   | 08/20/2007  | Third Party Demands    |       |      |         |       |        | Roberts, Jack            |      |        |        |                         | Open Group |           | p [                                 | Davis Tree Farms |                                    |
|   | 08/21/2007  | Prepare all Case Relat | ed Do | cum  | ents    |       |        | Roberts, Jack Closed     |      |        |        | d                       | Case       | 1         | Foster, Theresa - MDL-00-8675309-02 |                  |                                    |
|   | <u>08/21/2007</u>   | Prepare all Case Relat | ed Do | ocum | ents    |       |        | Roberts, Jack Closed Cas |      |        |        |                         | Close      | d         | Case                                |                  | Guthrie, Mike - MDL-00-8675309-03  |
|   | 08/21/2007  | Prepare all Case Relat | ed Do | ocum | ents    |       |        |                          | R    | oberts | , Jack |                         | Close      | d         | Case                                |                  | Kozior, France - MDL-00-8675309-04 |
|   | 08/21/2007  | Prepare all Case Relat | ed Do | ocum | ents    |       | Ε      | acł                      | n Ci | ustoi  | пC     | ale                     | enda       | ar re     | efleo                               | cts              | the information you've             |
|   | 08/21/2007  | Prepare all Case Relat | ed Do | ocum | ents    |       |        |                          |      |        |        |                         |            |           |                                     |                  | you to quickly view                |
|   | 08/21/2007  | Prepare all Case Relat | ed Do | ocum | ents    |       | 8      | Ind                      | ma   | inag   | ie th  | ner                     | n in       | COI       | ntex                                | rt a             | <u>nd as groups</u> . <u>7</u>     |
|   | Click a link to open a Calendar Entry or go to the Ca<br>or other Subject Record. |                        |       |      |         |       |        |                          |      |        |        | Entry or go to the Case |            |           |                                     |                  |                                    |



<u>Thank You</u> for taking this initial look at CaseManagerPro.

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