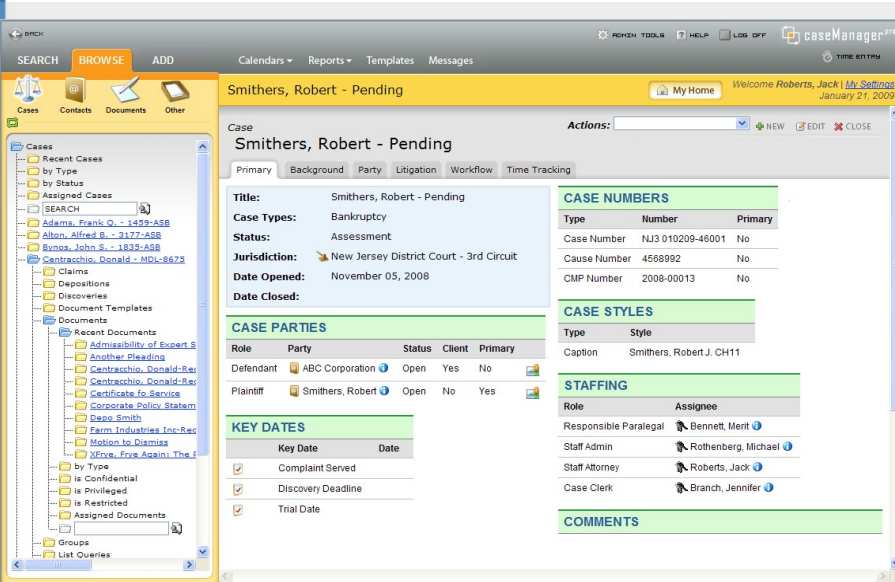## CaseManagerPro Overview

CaseManagerPro is the #1 web-based legal case management system ("CMS") providing *browser-based CMS with Microsoft SQL* since 2000. CaseManagerPro is used in law firms and corporations – from the very largest to local practices – for *millions* of cases and claims.

CaseManagerPro's underlying power and technical sophistication was harnessed with the release of CMPv3. Now at CMPv3.8, its endlessly adaptable and elegantly usable interface, make it practical for any legal practice.

Technology Overview

CaseManagerPro is multi-tier web-based design for Microsoft Internet Explorer 11 web browser (IE).

Multi-tier Open Architecture is very adaptable with maintainable performance and scalability.

User Interface code is Object Oriented Java-Script, DHTML, and AJAX. The "Toolkit" for documents uses .NET controls as well.

Microsoft IIS Web Server manages high-performance configurations of hardware and software for speed, scalability, and redundancy.

Microsoft SQL Server reliability reduces down-time, increases scalability and performance, and provides tight security controls. It's highly manageable and expertise is readily accessible. System users benefit from Microsoft Office interoperability and ease of integration.

Object-Oriented Design provides a consistent, more usable interface while reducing cost and facilitating customization and enhancement.

CaseManagerPro Capabilities

CMP was designed for some of the toughest legal actions ever - asbestos, MDL, product liability, toxic tort. Case and data complexity far exceeded abilities of any system in 1999 but was the ideal proving ground for a new performance standard.

Web-based CMS gives you…
o *24/7 Access* local or remote
o *Inter-Office* access for staff, co-counsel, clients, etc.
o *Lower cost* to install and maintain
o *Ease of Use* in familiar format
o *Outsource Hosting* as desired

Better Organization and Access to Information lets you save time, respond quickly, avoid risk, and manage staff, cases and clients more effectively.
o *Get Key Information* into one place
o *Receive Alerts* for pending items
o *Drill-down Quickly* to any record
o *Link Home Page* to key locations
o *Get Reports* with content you need
o *Set Reports* for regular delivery
o *Customize layouts* for optimal use

Best Practice management lowers risk and saves time by automating standard processes. CMP workflow is state-of-the-art. It will alert staff, update calendars and report to managers.

Cut support staff time & cost using *custom content and format* that they can match to their forms and preferences. They'll have a *clear-cut "To-Do" list* on their desktop, and *custom calendars* to better coordinate among the group.

Practices that Benefit

Above are just a few of the big capabilities that adapt and apply to any practice.

Current Clients Include…
o *Corporations* managing IP, outside counsel and protective or defensive litigation
o *Mega-firms* often for major client relationships or coordinating large-scale multi-firm litigation
o *Mid-sized firms* to incorporate standards, centralize organization and improve oversight
o *Plaintiff Firms* that handle diverse case loads or specialize in various types of mass tort.
o *Small Firms* that want to spend more time doing what they signed-up for – which isn't IT

Feature Highlights

Lucid IQ was founded by lead engineers from Raytheon Systems a decade ago and the technology reflects that sophistication.

Optimized Productivity

Technology is the means to achieve the result. Most systems deliver _their vision_ of productivity; some flexibility but within a fixed context.

With CaseManagerPro, _define your vision_ then apply our highly adaptable array of tools and capabilities to achieve it.

User Interface

Users are immediately comfortable with the web interface, simple layout and ease of navigation.

Screen Design is consistent among the records so users are quickly oriented. Navigation, color, font, and functional features provide UI structure but allow flexibility within, such as the custom areas and creating the record categories.

"My Home" is a dashboard of user-selected links and data. It can include current cases and documents, to-do updates, reports, messages and other priority information.

The Navigation Panel allows the user to add, search or browse all of the active records.

- _Search_ any type of record by multiple criteria including description, content – even "global".
- _Browse_ automates folder management based on user-defined record types and links.

The "Actions" Menu is at the top of each screen to add notes or call entries, attach documents, send messages, enter expenses, etc.

Related Records Menu at the bottom of each screen the user can view lists of links to all notes, documents, call records, expenses and other info tied to the record.

Primary Records

Four Primary Record categories provide basic structure with infinite flexibility to manage data. Each can be linked to any number of other records to provide complete relational tracking.

Cases (or Matters) are highly adaptable to any type of engagement – not only transactions or litigation, but admin processes, investigations, projects and initiatives, and other activities.

Contacts include clients, parties, staff, counsel, experts – any entity tied to any record or action.

Documents of any kind: electronic or hard, work product, evidentiary, in process, requested, etc.

Calendar Entries for tasks, meetings or events; workflow, admin or practice processes; court dockets or scheduling orders.

Security

CaseManagerPro has User Profiles managed with login names and passwords. The profiles define the _Record Class_ to which the User has access, allowing _segregation of practice areas_ and more sensitive records. _User Roles_ control Deny, Read-Only and Edit capabilities in depth.

Adaptability and Customization

Every record can be customized by non-tech staff to manage its content based on its use.

Custom Fields and Sections let you define content, format to match preferences or specific forms, and in what instances they appear.

Record Data are completely editable to match your practice, e.g.: Document, Case or Contact types, status fields and scores of others.

Workflow defines recurring processes, dates, staff assignments, and provides daily updates and auto-alerts for attorneys and staff.

Document Management

Documents are tracked in customizable profiles to which they are uploaded or linked. They are searchable by text and other criteria and can be attached to any number of other records. Each has workflow capability for routing and tracking.

Document Assembly allows data to be inserted into Word templates from one or more source records to create standard letters and forms.

Calendars

Custom calendars are very powerful, allowing users to create use-specific views for any group or project. They select: i) the people to include; ii) any number of ten record areas; iii) one, more or all tasks and dates from those areas.

Reporting

CaseManagerPro has a powerful report-building capability for non-tech users. Any field in the program can be selected the report. Criteria and operators based on the field determine the records that are included. Reports can be setup to monitor case activity, staff productivity, critical dates, pending issues, client status, and virtually anything else imaginable. They can even be scheduled for regular delivery.

Integration

CaseManagerPro integrates with Outlook, Exchange, Microsoft Office programs and various accounting, docketing, DMS, records retrieval, e-filing and other applications. Its open-architecture and other design features allow tremendous flexibility with other programs.