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DEADLINE ASSISTANT QUICK REFERENCE GUIDE

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Deadline Assistant Quick Reference Guide

Deadline Assistant makes calculating and managing court deadlines more efficient and accurate and helps to ensure no deadlines are missed. The entire matter team has access to every matter’s legal deadlines so everyone knows when important dates are approaching. Deadlines are calculated using the applicable court rules for the jurisdiction of your matter, and all users are informed of changes to court rules for the matters they work on. Matter deadlines can be customized by changing dates, renaming events, adding notes, and removing events from the calendar.

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Overview

Deadline Assistant makes calculating and managing court deadlines more efficient and accurate and helps to ensure no deadlines are missed. The entire matter team has access to every matter's legal deadlines so everyone knows when important dates are approaching.

Deadlines are calculated using the applicable court rules for the jurisdiction of your matter, and all users are informed of changes to court rules for the matters they work on. Matter deadlines can be customized by changing dates, renaming events, adding notes, and removing events from the calendar.

Permissions

OVERVIEW

Permissions are applied at the matter level and control how legal deadlines can be created, edited, and deleted.

The permissions available in Deadline Assistant include:

- Administrator
- Owner
- Editor
- Read-Only
- Denied Access

Administrator

An Administrator has full access to all matters, clients, and deadlines in Deadline Assistant. It is possible and encouraged to have more than one Administrator.

Owner

An Owner can create, edit, review, and delete matters and events.

Read-Only

Read-Only access allows a user to view matter information and events, but a Read-Only user cannot edit or delete any information.

Denied Access

Denied Access prohibits a user from any access to a matter and its information and events. No information about the matter will display in any search results for this user.

Global Banner

The Global Banner includes:

- Global tabs (Home, Matters, Rule Updates).
- Global icons to add new Matters, Clients, or Events.
- User name options to set preferences, switch to Administrator (if applicable), and sign out.
- Links to Copyright information, Privacy Policy, Help, Improve Deadline Assistant, and Contact Us.

GLOBAL TABS

The Home, Matters, and Rules Updates tabs are used to access your information.

Home Tab

The Home tab is the default page that displays when you first log in to Deadline Assistant. This is the Global Calendar that displays matter events.

Matters Tab

The Matters tab is where you can view matters you are assigned to as part of the matter team or view all matters.

Rules Updates Tab

The Rules Updates tab displays a report of recent updates to court rules used in your matters.

GLOBAL ICONS

Available from the Deadline Assistant banner are icons to **Add Matters**, **Add Clients**, and **Add Events**. These icons provide a quick way to create information. Matters, clients, and events are discussed in further detail in their applicable sections.

USER NAME OPTIONS

The options available from the user name drop-down include Preferences, Admin, and Sign Out. The Admin option is only available if you have Administrator permissions. Refer to the Administrator section for more information.

Preferences

Preferences allow you to set your daily calendar preferences and update your profile. Preferences are user-specific.

The **Calendar** link located on the Calendar page is unique to the user. You can copy and paste the link into a third-party calendaring system to view events and deadlines created in Deadline Assistant.

Setting Calendar Preferences

- Select the start time.
- To have the current time automatically scroll when viewing your calendar by the day, select the check box.
- Save your changes.

Setting My Profile Preferences

- Type your name as you want it displayed in Deadline Assistant.
- Save your changes.

Signing Out of Deadline Assistant

To sign out of Deadline Assistant, click the arrow next to your name in the banner and select **Sign Out**.

LINKS TO INFORMATION

Located in the footer section of Deadline Assistant are links to view copyright information, the privacy statement, online help, submit suggestions to improve Deadline Assistant, and contact information.

Home

The Home tab includes:

- Global Calendar Agenda
- Global Calendar Filters
- Global Calendar

The Global Calendar displays on the home page for all users. The default view is the current month, showing the events for the your matters.

AGENDA

The Agenda displays a list of all events for the next 60 days. If the Agenda is empty, there are no future events.

FILTERS

Filter selections control which events display on the calendar. You can filter by users or by clients.

Filtering the Global Calendar by Users

The Global Calendar defaults to filtering events for the current user. The check box next to the user's name is selected by default each time you return to the Global Calendar.

- To view all matter events for all users, deselect the check box by your name or click **Clear Filters**.
- To view matter events by specific users, click **Select Users**.
 - a. In the Users window, search or scroll to the user's name.
 - b. Select the check mark to select.
 - c. To remove a name from the filter list, under Selected Client, click the name or the "x".
 - d. Click **Filters** to close the Users list and return to the calendar.
- To clear all filters, click **Clear Filters**

Filtering the Global Calendar by Client

- To view matter events for specific clients, click **Select Client**.
 - a. On the Client Filter window, for *Available Clients*, type a space to view a full client list or begin typing the client's name to display a list of client names matching the criteria.
 - b. To filter by a specific client name, from the returned list, select the name or check mark. The name displays under Selected Clients.
 - c. To remove a name from the filter list, under Selected Client, click the name or the "x".
 - d. Click **Filters** and the calendar will filter and display matters for the selected client.

CALENDAR

The Global Calendar displays all events for all matters. You will not see events for matters that you are denied access to.

Viewing and Navigating the Global Calendar

- To change the view of the calendar, click **Day**, **Week**, or **Month**.
- To browse the calendar, click the left or right **arrows** by the date.
 - a. If you are viewing the calendar by month, clicking the **arrows** will go back or forward one month.
 - b. If you are viewing the calendar by week, clicking the **arrows** will go back or forward one week.
 - c. If you are viewing the calendar by day, clicking the **arrows** will go back or forward one day.
- To go directly to today's date, click **Today**.
- To select a specific date, click the **arrow** next to **Today**. Select the month, year, and then click on the day.
- To deliver information, click **Email/Print/Download**.

Add Calendar to Third-Party Calendaring Systems

FEATURE OVERVIEW

Calendar Integration allows you to view your Deadline Assistant calendar in third-party calendaring systems. Matter events and deadlines created using Deadline Assistant will display in third-party calendaring systems outside of Deadline Assistant.

Deadline Assistant matter events cannot be edited from your third-party calendar; they can only be edited within Deadline Assistant calendars. However, edits made in Deadline Assistant will display in your third-party calendar.

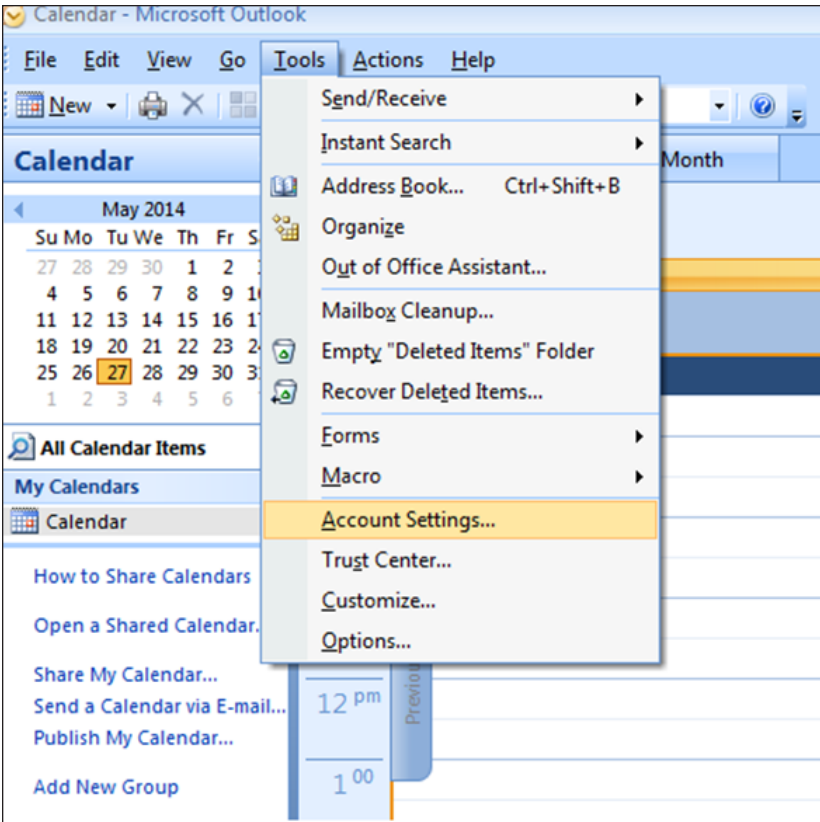
Deadline Assistant Calendars may be integrated with the following third-party calendaring systems:

1. Microsoft Outlook
2. Google
3. Yahoo
4. Outlook.com (Hotmail)
5. iPhone and Android mobile phone calendars

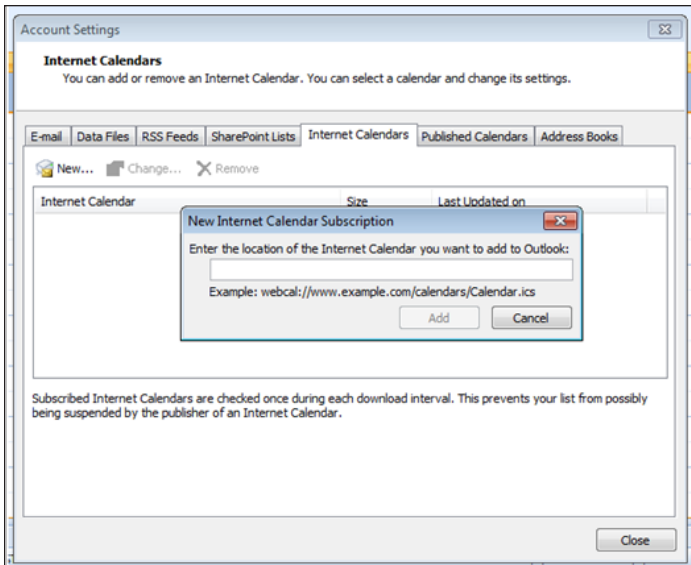
MICROSOFT OUTLOOK CALENDAR INTEGRATION

To integrate your Microsoft Outlook Calendar with Deadline Assistant, log in to Deadline Assistant and access your Preferences by clicking on your name in the upper right corner of Deadline Assistant.

Click the **Calendar** link. Copy the unique URL to add this calendar view to your Microsoft Outlook calendar. The link will appear highlighted so you can easily copy the entire URL. Access your Microsoft Outlook Calendar, click the **Tools** drop-down menu and select **Account Settings**.



The Microsoft Outlook Account Settings window opens and provides various tabs by which you can manage your Accounts Settings. Click the Internet Calendars tab and the **New** button to open a New Internet Calendar Subscription window into which you will paste the URL.



If you use Microsoft Outlook 2007, the URL generated by Deadline Assistant begins with "https://". The "https://" needs to be changed to "webcal://" in order to be accepted by Microsoft Outlook 2007 for integration. Once the URL is copied into the New Internet Calendar Subscription window and the beginning is modified (if necessary), click **Add**.

After you add the URL, a Subscription Options window opens, where you can set certain options related to the calendar you are adding. The Folder Name will default to "calendars," which can be modified as you prefer, e.g., Deadline Assistant Calendar. You may also enter a description for the added calendar, among other options.

After setting your Subscription Options, click **OK**. You have now integrated a view of your Deadline Assistant calendar with your Microsoft Outlook calendar.

The added calendar will be listed under "Other Calendars" in the left column of your Microsoft Outlook Calendar.

To display the added calendar, select the check box next to it and it will display alongside your standard Outlook calendar.

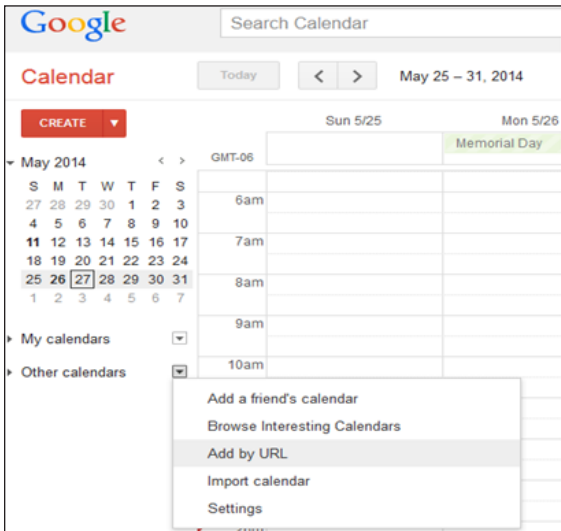
Note: The calendars may be displayed in a side-by-side or overlay view. Access View to change the mode in which the calendars are displayed.

After you have integrated your Deadline Assistant calendar, Outlook may take up to 24 hours to refresh its calendar, providing you with a view of recently added or edited Deadline Assistant events. The events can be viewed but not edited in Microsoft Outlook.

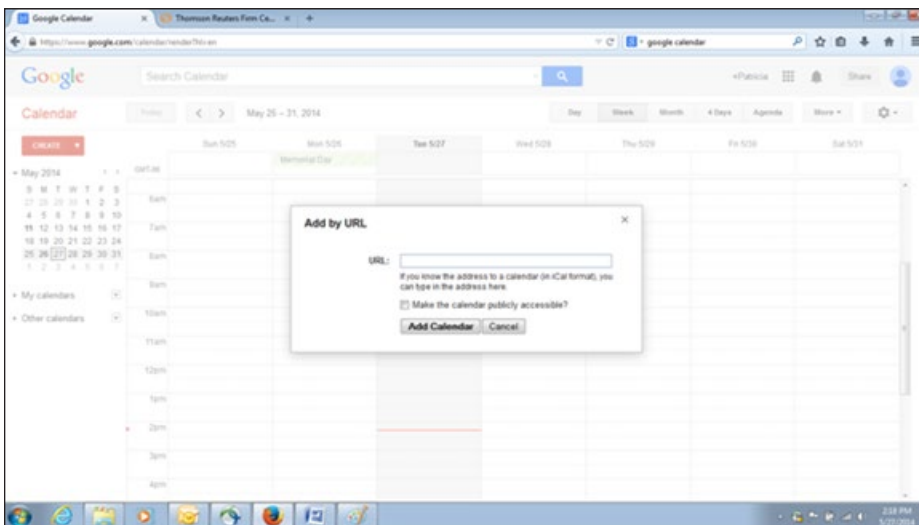
GOOGLE CALENDAR INTEGRATION

To integrate your Google calendar with Deadline Assistant, log in to Deadline Assistant and access your Preferences by clicking on your name in the upper right corner of Deadline Assistant.

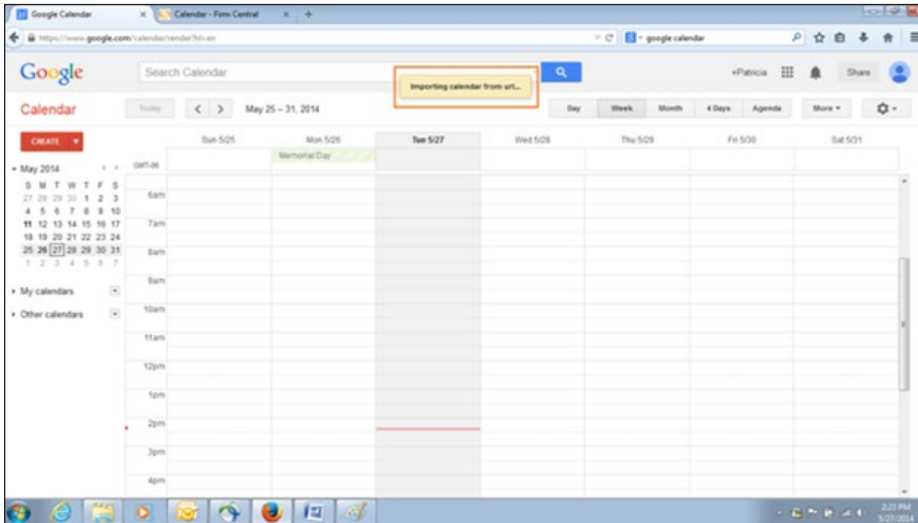
Click the **Calendar** link. Copy the unique URL to add this calendar view to your Google calendar. The link will appear highlighted so you can easily copy the entire URL. Access your Google calendar, click the *Other calendars* drop-down menu, and select **Add by URL**.



An Add by URL window will open, where you will paste the unique URL.



After pasting the Deadline Assistant URL into the Add by URL window, click **Add Calendar**. A message will appear indicating that the calendar is being imported via the URL.



After the Deadline Assistant calendar has been added to your Google calendar, all Deadline Assistant events will display on your integrated calendar. The events can be viewed but not edited in Google. Events created and edited in Deadline Assistant will appear in the Google calendar view following a standard Google refresh of the information.

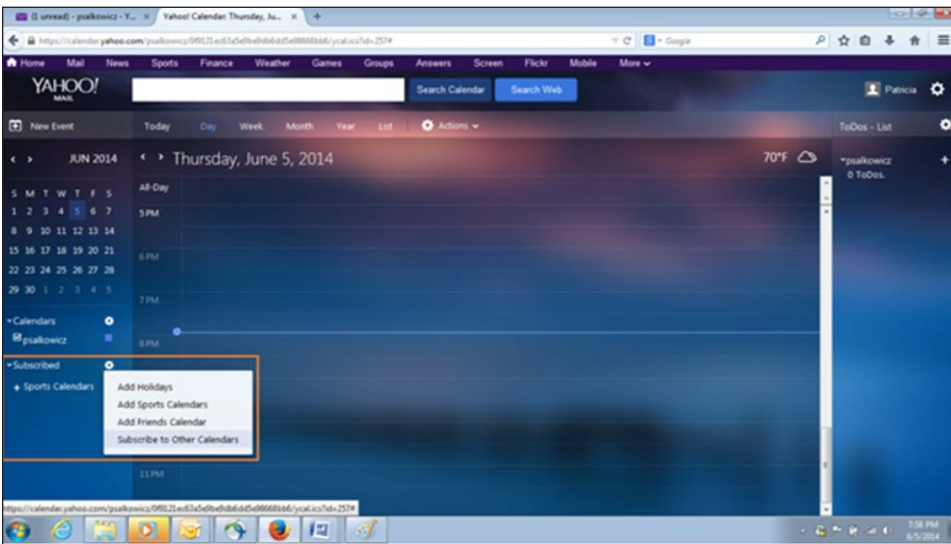
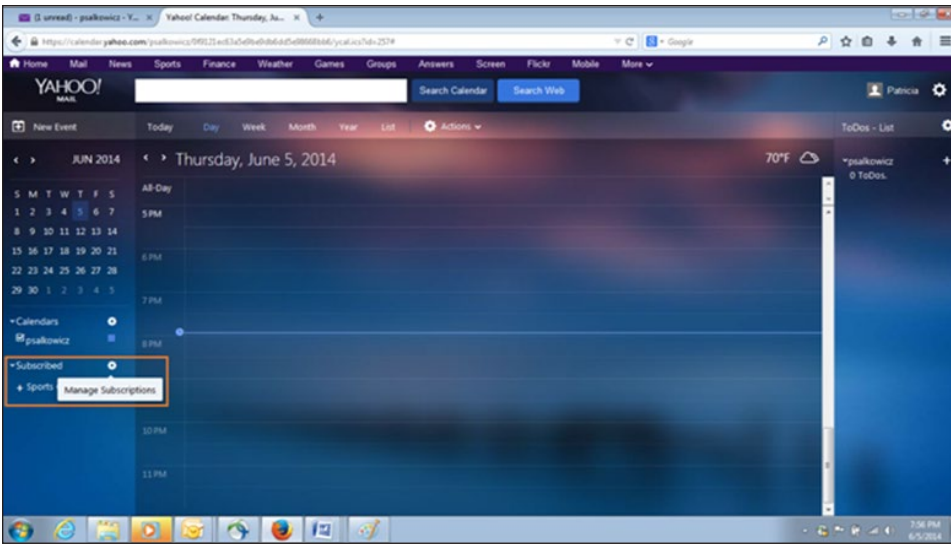
Note: To view the details of a Deadline Assistant event in your Google calendar, click the case name link, which will direct you to the event details.

YAHOO CALENDAR INTEGRATION

To integrate your Yahoo calendar with Deadline Assistant, log in to Deadline Assistant and access your Preferences by clicking on your name in the upper right corner of Deadline Assistant.

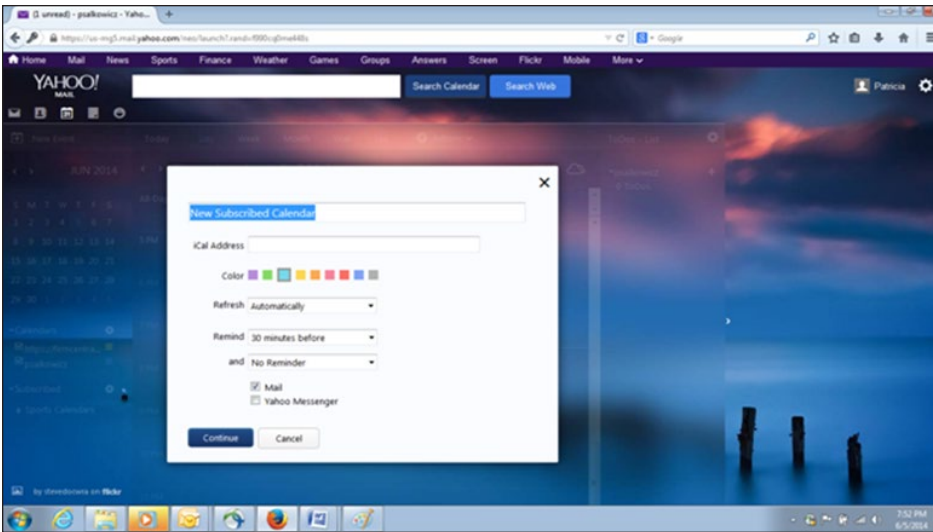
Click the **Calendar** link. Copy the unique URL to add this calendar view to your Yahoo calendar. The link will appear highlighted so you can easily copy the entire URL.

Access your Yahoo calendar, click the **Manage Subscriptions** (gear) icon and click **Subscribe to Other Calendars**.



A New Subscribed Calendar window will open into which you will paste the unique URL. You can type over the New Subscribed Calendar text to name the calendar, e.g., Deadline Assistant Calendar, and set other options, including Color and Refresh (automatic or manual), among others.

Note: It is best to select a different color for your integrated calendar than the Yahoo Calendar color; Deadline Assistant integrated events are easily distinguishable in a different color.



After pasting the Deadline Assistant URL into the New Subscribed Calendar window, click **Continue**. Yahoo is now subscribed to your Deadline Assistant Calendar.

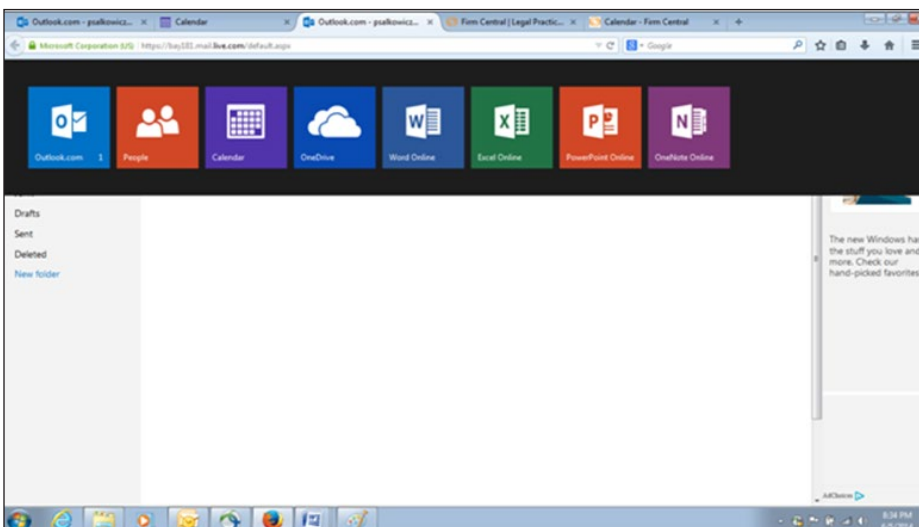
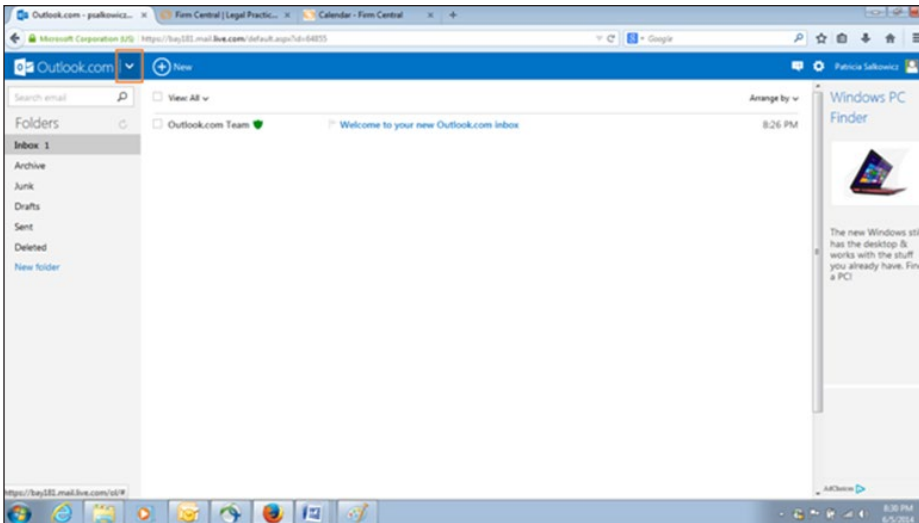
After the Deadline Assistant calendar has been added to your Yahoo calendar, all Deadline Assistant events will display on your integrated calendar. The events can be viewed but not edited in Yahoo. Events created and edited in Deadline Assistant will appear in the Yahoo calendar view following a standard Yahoo refresh of the information.

OUTLOOK.COM (HOTMAIL) CALENDAR INTEGRATION

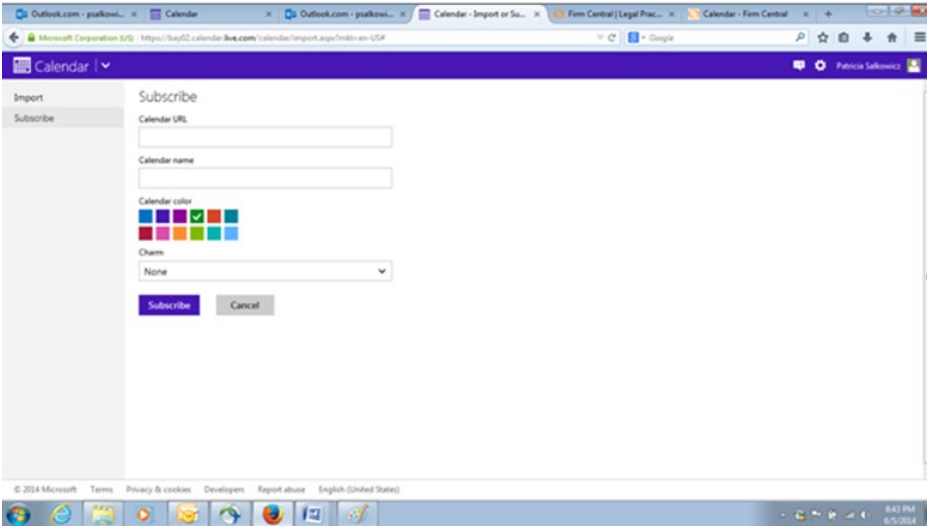
To integrate your Outlook.com (Hotmail) calendar with Deadline Assistant, log in to Deadline Assistant and access your Preferences by clicking on your name in the upper right corner of Deadline Assistant.

Click the **Calendar** link. Copy the unique URL to add this calendar view to your Microsoft Outlook calendar. The link will appear highlighted so you can easily copy the entire URL.

Access your Outlook.com (Hotmail) Calendar and click the **Outlook.com down arrow** to access your Outlook.com (Hotmail) calendar options.

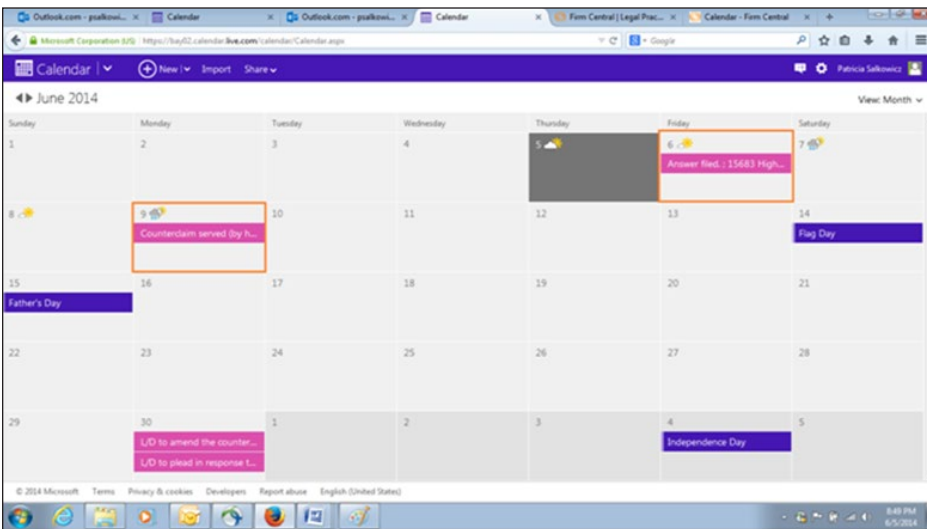


Navigate to your Outlook.com (Hotmail) Calendar by clicking on the **Calendar** button. After you access your Outlook.com (Hotmail) Calendar, click **Import** and click **Subscribe**.



Paste the Deadline Assistant URL into *Subscribe - Calendar URL* box, name the calendar, e.g., Deadline Assistant Calendar, select the Calendar Color and Charm (optional), and click **Subscribe**.

Note: It is best to select a different color for your integrated calendar than the Outlook.com (Hotmail) Calendar color; Deadline Assistant integrated events are easily distinguishable in a different color.



Your Deadline Assistant Calendar events are now integrated with and displayed on your Outlook.com (Hotmail) Calendar. The events can be viewed but not edited in your Outlook.com (Hotmail) Calendar. Events created and edited in Deadline Assistant will appear in the Outlook.com (Hotmail) Calendar view, following a standard refresh of the information.

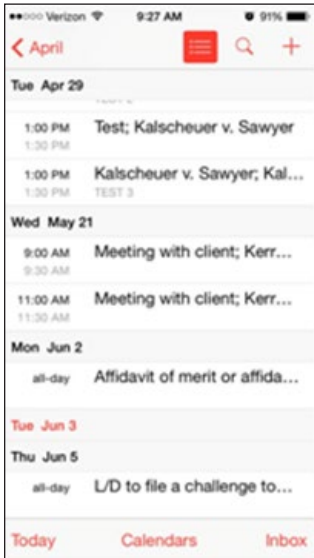
IPHONE CALENDAR INTEGRATION

To integrate your iPhone calendar with Deadline Assistant, log in to Deadline Assistant and access your Preferences by clicking on your name in the upper right corner of Deadline Assistant.

Click the **Calendar** link. Copy the unique URL, paste it into an email, and send it to an email account you access on your iPhone. With your iPhone, open the email that contains the unique URL generated by Deadline Assistant and click the URL.

Clicking the URL on your iPhone opens a window with a Subscribe option. Click **Subscribe**.

You will be notified that your Deadline Assistant Calendar has been added. Click **View Events** to see your Deadline Assistant Calendar events. Click into a specific event to see the event details.



The events can be viewed but not edited in your iPhone Calendar. Events created and edited in Deadline Assistant will appear in the iPhone Calendar view following a standard refresh of the information.

ANDROID CALENDAR INTEGRATION

To integrate your Android calendar with Deadline Assistant, log in to Deadline Assistant and access your Preferences by clicking on your name in the upper right corner of Deadline Assistant.

Click the **Calendar** link. Copy the unique URL, paste it into an email, and send it to an email account you access on your Android. With your Android, open the email that contains the unique URL generated by Deadline Assistant and click the URL.

Clicking the URL on your Android opens a window with a Subscribe option. Click **Subscribe**.

You will be notified that your Deadline Assistant Calendar has been added. Click **View Events** to see your Deadline Assistant Calendar events. Click into a specific event to see the event details.

DELIVERY METHODS

The Delivery Methods options are available from multiple places (Matters, Events, calendars). To deliver the matter list information, click **Email/Print/Download**.

Clients

Clients are required to create matters in Deadline Assistant. You can add clients individually or you can import multiple clients using a .csv file.

You can add clients from the banner by clicking the **Add Client** icon or from the New Matter page when searching for the client name by clicking **create a new client**.

ADDING A CLIENT

1. To add a new client name, click **Add Client**.
2. Enter the required information.
 - a. Type the client's *first name*.
 - b. Type the client's *last name*.
3. Enter any optional information. You can edit this information later.
 - a. Type the client's *middle name*.
 - b. Type the client's *preferred name*.
 - c. Type the client's *ID*.
 - d. Type the client's *contact number*.
 - e. Type the client's *email address*.
4. Click **Save**.

EDITING A CLIENT

You can edit client information from matters or from the Matter Profile Client section.

- From All Matters or My Matters tabs, click the client name. Edit the information, and click **Save**.
- From the Matter Profile subtab, next to client information, click **Edit**. Edit the information, and click **Save**.

Matters

OVERVIEW

The Matter Calendar and Profile tab help to organize all matter information in one location.

To view matters, select the Matters tab. The All Matters tab allows you to view all matters that you have appropriate permissions for. Selecting the My Matters tab allows you to view the matters you are assigned as a team member.

MATTER LIST

Matters are listed by matter name, name of the client, and status. You can change how the names are sorted by selecting from the list of options available from *Sort by*. You can filter the list by open or closed matters and by matter open date.

Searching the Matter List

- Type search terms in the *Search My Matters* box.
- Click the **magnifying glass**. The matters that match the search display with the search terms highlighted.
- To clear the search, click **Clear Query**.

Filter the Matter List

- To view open or closed matters, select the appropriate check box.
- To view matters by specific team members, select the appropriate check box next to the name. This filter is available on the All Matters tab.
- To view matters by opened date, select the appropriate choice from the drop-down list.
- To clear all filters, click **Clear Filters**.

Sorting the Matter List

- To change how the matter list displays, select the appropriate option from the *Sort By* list.

Delivering the Matter List

- To deliver the matter list information, click **Email/Click/Download**.
 - a. The icon displays the preferred delivery method. To change the method, click the arrow.

ADDING A MATTER

1. To add a new matter, click **Add Matter** in the banner.
2. For the new matter, enter the required information.
 - a. Type the *Matter Name*.
 - b. The *Date Opened* defaults to today's date but can be changed by clicking the calendar icon.
 - c. Type the name of the client. As you type, a list of names displays for you to select. You can also use the space bar to display a list of all clients. If the client name is not available at the bottom of the list, click **create new client**. Refer to the Clients section for more information on creating a new client.
3. Optional information can be entered on creation or at a later time.
 - a. Type the *Matter ID*.
 - b. Type the *Docket Number* assigned by the court, if known. If there is more than one number, click **Add Another Docket**. Use the Docket Link feature to link the docket number directly to the full text docket in Westlaw.
4. Define the matter permissions and team.
 - a. For each applicable name, select the *Matter Permission* you want to assign by clicking the **arrow** next to the name and selecting an option from the list. For more information, refer to the Permissions section.
 - b. If the person is on the team for this matter, select the check box. The person can have owner, editor, or read-only permissions and be on a team for a matter.
5. To save the matter, click **Save**.

VIEWING A MATTER

When you click on a matter from the All Matters or My Matters tab, the landing page for that matter displays. The landing page consists of a Calendar tab with Profile and Agenda subtabs, an Event Directory tab, and a New Event tab.

To return to the list of matters, click **Back to My Matters**. You can close, delete, or reopen a matter by clicking **More Options** (the gear icon).

Matter Calendar

The matter calendar displays the deadline events associated with that matter. The Agenda subtab displays a list of all events for the matter for the next 60 days. The Profile subtab displays client information, matter information, and the matter team members. From the Profile subtab, you can edit client, matter, and team information.

Editing Matter Information

From the Matter Calendar, Profile subtab, click **Edit** for the section you want to edit (Client, Matter, or Matter Team).

- a. For client information, you can update the client name, ID, phone number, and email address. Click **Save**.
- b. For matter information, you can update the matter name, ID, and docket number. Click **Save**.
- c. For the matter team, you can update permissions and members of the matter team. Click **Save**.

Closing a Matter

Only an Owner can close a matter. The closed date and any notes will display on the Profile subtab.

1. To close a matter, click **More Options** (gear icon).
2. Click **Close Matter**.
3. The *Close Date* defaults to today's date, but can be changed. The close date must be later than the date the matter was opened.
4. You can type notes to include regarding the matter.
5. Click **Close Matter**.

Reopening a Matter

Only an Owner can reopen a matter. The reopened date and any notes will display on the Profile subtab.

1. To reopen a matter, click **More Options** (gear icon).
2. Click **Reopen Matter**.
3. The *Reopened Date* defaults to today's date, but can be changed. The reopen date must be after the last closed date.
4. You can type notes to include with the matter.
5. Click **Reopen Matter**.

Deleting a Matter

Only an Owner can delete a matter. When a matter is deleted, it is removed from your list of matters and is permanently deleted.

1. To delete a matter, click **More Options** (gear icon).
2. Click **Delete Matter**.
3. To confirm the deletion, click **OK**.

EVENT DIRECTORY

The Event Directory lists all events for the selected matter. The information displayed includes the name of the Parent Event, the date of the event, the date last updated, and a button to delete the event and any related events.

For more details, refer to the Events section.

Import

You can import multiple matters and clients into Deadline Assistant using a .csv file. Client names are required to create matters, so import your clients first. The import option is available by clicking **Matters** from the Deadline Assistant banner.

IMPORT CLIENTS

1. From the Matters page, click **Import**.
2. Click **Import Clients**.
3. After reading the warning message, click **Continue**.
4. Navigate to the location of your .csv file and click **Open**.
5. The Import Management page displays with three columns:
 - **Sample** is example data for mapping.
 - **Column Names** are extracted from your file so you can map to the fields available.
 - **Matched Field** attempts to match the column names from your file to the fields in Deadline Assistant.
 - a. For Matched Fields, review the fields. If the field does not match the column name, select the appropriate field from the list. You cannot match a field to more than one column name.
 - b. Click **Next**. If you have matched a field name to more than one column name, an error message displays. Correct the error by selecting a different field name or choose *select* if you do not want to map the column name to a specific field. This data will not be imported.
6. The clients are listed for you to review. You can modify any of the data in the fields before completing the import process.
 - a. Deselect the check box for any client you do not want to import.
 - b. To expand the information for each client, click **More Fields**. To collapse the information, click **Fewer Fields**.
7. After you have reviewed and entered the client information, you are ready to import.
 - a. To import all of the selected clients, click **Import Selected**.
 - b. To import clients one at a time, next to each client, click **Import**.
8. To complete the import process, click **Done**.

IMPORT MATTERS

1. From the Matters page, click **Import**.
2. Click **Import Matters**.
3. After reading the warning message, click **Continue**.
4. Navigate to the location of your .csv file and click **Open**.
5. The Import Management page displays with three columns:
 - **Sample** is example data for mapping.
 - **Column Names** are extracted from your file so you can map to the fields available.
 - **Matched Field** attempts to match the column names from your file to the fields in Deadline Assistant.
 - a. For Matched Fields, review the fields. If the field does not match the column name, select the appropriate field from the list. You cannot match a field to more than one column name.
 - b. Click **Next**. If you have matched a field name to more than one column name, an error is displayed. Correct the error by selecting a different field name or choose *select* if you do not want to map the column name to a specific field. This data will not be imported.
6. The matters are listed for you to review. You can modify any of the data in the fields before completing the import process.
 - If Deadline Assistant cannot verify a client name, the field is left blank.
 - An “i” icon displays next to the Client heading. Hover your mouse over the icon and the client name for your .csv file displays.
 - Type the name. A list of suggested names displays for you to choose.
 - If you did not add the client before adding its matter, you need to add the client first and add this matter later.
7. After you have reviewed and entered the matter information, you are ready to import.
 - a. Deselect the check box for any matter you do not want to import.
 - b. To import all of the selected matters, click **Import Selected**.
 - c. To import the matters one matter at a time, next to each matter, click **Import**.
8. To complete the import process, click **Done**.

Events

OVERVIEW

Every matter has various legal deadlines that must be noted and adhered to. These events are often determined by the rules of court of the applicable jurisdiction for that matter. New Events can be added from the New Event subtab from the matter's landing page or by clicking **Add Event** in the Deadline Assistant banner. An event can be referred to as a Parent Event, Triggering Event, or Known Event.

You can also add custom events related to your internal office processes, such as conducting research or follow-up meetings regarding the matter. Refer to the Event Customization section for more information about creating custom events and custom rules sets.

ADDING AN EVENT

The below steps are applicable when you create an event from the Matter landing page and the New Event tab. If you click **Add Event** from the global banner, select the client and matter name from the window and then continue with the listed steps.

1. Select the rules set applicable to this event by clicking the arrow and selecting an option from the list.
 - a. First, select the appropriate jurisdiction by clicking the arrow and selecting an option from the list.
 - b. Next, select the appropriate second and additional levels by clicking the arrow and selecting an option from the list.
 - c. To avoid stopping at step one each time you calculate a deadline for this matter, select *Skip this step*. The next new event for this matter will then skip this first step and go directly to step two and use the previously selected rules set.
 - d. To continue to the next step, click **Next**.

Note: There can be up to four *Select a Rules Set* levels to define depending on the rules set selections made.

2. Select a Parent Event from the rule set (this is the day you know, the triggering event).
 - a. You can scroll through the list or type text in the *Search* box to locate a particular event. To select the Parent Event, select the radio button.
 - b. To continue to the next step, click **Next**.

There are also links to the applicable Codes, Statutes, Court Rules, or other authority associated with the event. Clicking the link will direct you to Westlaw, where you can view the full text of the authority.

Note: Clicking the plus sign next to the Parent Event will expand and display all related deadlines that will be calculated for the known event.

3. Select a date and a time, if applicable.
 - a. Select the date of the Parent Event (i.e., the date you served the complaint).
 - b. If the Parent Event has a specific start and end time, select the *Time* check box. Clicking in each time box displays a list where you can select the applicable times.
 - c. To continue to the next step, click **Next**.

4. Confirm and save your Parent Event information. From the date entered in the above step, the Child Event dates (or related events) are calculated.
 - a. Next to each event (Parent and Child) is a check box. If you do not want an event to display on the Matter Calendar, deselect the check box.
 - b. To modify the Parent Event, you can go back to any of the previous three steps by clicking on the link for that step.
 - c. At this point, you can save the information. To save the information, click **Save & Finish**. The events will display on the Matter Calendar.
5. Before saving the event, you can customize the information for the events calculated.
 - a. To rename the event, hover your mouse over the text and click **Rename**. Type the new name and click **Save**.

To change the renamed event back to the original name, hover your mouse over the text, click **View Original**, and then click **Revert to Original**.

- b. To add a note to the event, hover your mouse over the text and click **Add Note**. Type the text for the note and click **Save**. The note displays under the event.

To edit or delete the note, hover your mouse over the text and click **Edit Note**. Edit the text or clear the field to remove the note and click **Save**.

- c. To change the date, click **Edit**. Select the date and time, if applicable. You can type notes related to why the date is changing. Click **Confirm**. Before changing the dates for an event, please read the below information to understand the impact of making this change.

Changing the date on a Parent or Child Event will do the following:

- Changing the Parent Event date will recalculate the deadlines for its Child Events.
 - Changing a Child Event only modifies that event and any dates dependent on that Child Event. It will not recalculate the Parent Event or other Child Events from that Parent.
 - Changing a Child Event date will sever the relationship with the Parent Event and will no longer automatically recalculate if the Parent Event date is edited or recalculated.
 - Carefully monitor the dates of severed Child Events if the Parent Event date is changed.
- d. To delete an event, click the **delete** button (red "x"). To confirm the deletion, read the warning message and click **Yes, Delete**. This cannot be undone.

If you select *Do not show me this message again*, you will not receive the confirmation prior to deleting any events during the current session. The message will display at the start of the next session.

- e. To save the information, click **Save & Finish**.

EVENT DIRECTORY

The Event Directory is a tab available from the Matter landing page. All calculated deadlines for this matter will display in the directory. The Event Date and the date last updated display for each event. The **Parent Name** is a link. Click the link to go to the Event Profile page and manage the event (and its Child Events). You can also rename the event, add notes, delete an event, or edit the date. You can view current information, or click **History** to view any changes made to the event.

The below tasks are applicable to events previously created. To make these changes, you must be on the Event Profile page.

Managing Event Information

To display the Event information from the Event Directory tab, click the event name. The Event Profile page is displayed.

Editing a Parent/Child Event

1. To change the date of the event, click the **Edit** link next to the date on the profile page.
2. Select the date and time, if a specific start and end time are applicable.
3. Type a note to explain why the date is changing, if needed.
4. Click **Confirm**.

Changing the date on a Parent or Child Event will do the following:

- Changing the Parent Event date will recalculate the deadlines for its Child Events.
- Changing a Child Event only modifies that event and any dates dependent on that Child Event. It will not recalculate the Parent Event or other Child Events.
- Changing a Child Event date will sever the relationship with the Parent Event and will no longer automatically recalculate if the Parent Event date is edited or recalculated.
- Carefully monitor the dates of severed Child Events if the Parent Event date is changed.

Renaming a Parent/Child Event

1. To rename the event, hover your mouse over the text and click **Rename**.
2. Type the new name.
3. Click **Save**.

Adding a Note to a Parent/Child Event

1. To add a note to the event, hover your mouse over the text and click **Add Note**.
2. Type the text for the note.
3. Click **Save**.

Deleting a Parent/Child Event

1. To delete an event, click the **delete** button (red "x"). This will also remove the event from the matter and Global Calendar.
2. To confirm the deletion, read the warning message and click **Yes, Delete**. This cannot be undone.

If you select *Do not show this message again*, you will not receive the confirmation prior to deleting any events for the rest of the session. The message will display at the start of the next session.

Updates and Alerts

Calendar rules sets are written from court rules and statutes. As rules and statutes are amended and revised, the rules sets need to be updated to incorporate any changes. You will be notified via email when rules sets that are used in your matters have been updated.

An icon will display next to an event name that has potentially been affected by a recent rules sets update. If you receive an email or notice the icon, you should consider recalculating.

Things to consider when recalculating:

- Information is updated and events on the calendar will be moved to the new dates, if applicable.
- Changes are reflected in the History tab (Event Profile page).
- **Recalculate** updates the parent and all non-severed child dates. You can only recalculate the entire group; you cannot individually recalculate a Child Event.
- If a Child Event is manually edited, it will not update if the Parent Event is recalculated. The manually entered date is preserved. However, you should review the date to confirm it is still within the time provided by the rules.

RECALCULATING

To recalculate, go to the Matter landing page. Select the Event Directory subtab and click on the applicable linked event name to go the Event Profile page. You may also select the event from the matter calendar and click the **Profile** button on the event. This will take you to the Event Profile page, where you can recalculate the event and its related deadlines.

1. From the Event Directory tab, click the event name to recalculate. The Event Profile page displays.
2. Click **Recalculate**.
3. On the Recalculate Event window, make the applicable selections.
4. Click **Continue**.

Administration

Deadline Assistant Administrators can customize rules sets. Additionally, the Administrator can create default matter permissions for users, add users to matters with specified permissions, and make users inactive.

On the Administration page, selecting **Deadline Assistant** allows you to customize rule sets by renaming, adding notes, excluding items, adding custom events, and creating completely custom rules sets. Selecting **User Management** allows you to define default permissions, add users to matters, and inactivate users.

ACCESSING ADMINISTRATION

1. To access Administration, log in to Deadline Assistant.
2. Click the arrow next to your name located in the banner and select **Admin**.

To return to Deadline Assistant as a non-administrator, click the arrow next to your name in the banner and select **Non-Admin**.

DEADLINE ASSISTANT**Modifying Rule Sets**

1. Select the rules set to modify.
 - a. First, select the appropriate jurisdiction by clicking the arrow and selecting an option from the list.
 - b. Next, select the appropriate secondary level and any additional jurisdictional levels by clicking the arrow and selecting an option from the list.
 - c. To continue to step two, click **Next**.

Note: If a rules set is not available for the jurisdiction of your matter you can create a new custom rules set by clicking **New Rules Set**. Type the *Rules Set Name* and click **Save and Continue**. Type the *Event Title* and you can click **Save and Return** or **Save and Add Child**. (See Custom Rules Sets to learn more about this function.)

2. A list of event templates contained in the selected rules set displays, allowing you to make changes to the event templates. Changes are saved automatically on this page; there is no save button to click.
 - a. You can scroll through the list or type text in the *Search* box to locate a particular event.

Note: Clicking the plus sign next to the Parent Event will expand and display all Child Events. There are also links to the applicable codes, statutes, court rules, or other authority associated with the event. Clicking the link will direct you to Westlaw, where you can view the full text of the authority.

- b. To rename the event, hover your mouse over the text and click **Rename**. Type the new name and click **Save**. To change the renamed event back to the original name, hover your mouse over the text, click **View Original**, and then click **Revert to Original**.
 - c. To add a note to the event, hover your mouse over the text and click **Add Note**. Type the text for the note and click **Save**. The note displays under the event. To edit or delete the note, hover your mouse over the text and click **Edit Note**. Edit the text or clear the field to remove the note and click **Save**.
 - d. To add a new custom event to the rules set, click **Custom Event**. Type the *Event Title* and you can **Save and Return** or **Save and Add Child**.
 - e. To add a new custom Child Event to the selected rules set, click the green plus button. Type the *Event Title*, select when the event occurs, and click to save or add Child Events.
 - f. To edit a specific rules set, click the **Pencil** button. You will set defaults for the selected event template and add applicable notes. Click **Confirm**.

You can edit Child Event templates individually by clicking the **Pencil** icon next to the applicable template.

- g. To exclude a Parent or Child Event from the rules set template, click the red "x" button. To confirm, click **Exclude**. The excluded events remain in the list with a line through the Parent and any Child Events. To undo, click **Include**.
 - h. To undo any modifications made, click **Revert All**. This returns all of the Event Templates to their original settings. This will revert **all** changes made to this rules set. This will only affect the rules set you are currently working on. It does not revert modifications made to other rules sets.
3. To continue making changes to event templates, click **Select New Rules Set**. You will return to step one, where you can select another rules set to customize.

Adding Custom Events to Existing Rules Sets

Pre-existing rules sets contain the deadline events as defined by the court or legislature of that jurisdiction. However, you can insert your own office procedures and processes into an existing court rules set to help intertwine all important deadlines and work milestones.

Use Custom Events to insert your procedures in along with the court rules by selecting the rules set you wish to modify.

After selecting the appropriate rules set on step one of Deadline Assistant Admin, follow these steps:

1. Click **Next** to continue to step two to add custom events to the selected rules set.
2. On step two, all of the deadline events for the selected rules set are displayed.
3. Click the **Custom Event** button on the top right.
 - a. Name the top level custom event.
 - b. Select *Add Child*.
 - c. Name the Child, or dependent, Event and select the amount of days before or after the Parent Event that the Child Event should occur.
 - d. Verify that you have the correct parent name in the *parent name* field. You can type in the field and press enter and all events in this event grouping will appear, allowing you to select the event that will be the Parent Event of the dependent event you are adding.
 - e. You can add as many levels as you want, with each event being dependent upon an event above it, or you may add many Child Events all just below the Parent Event level.
4. The Custom Events added to an existing rules set will use the same holiday counting and weekend counting as the jurisdiction of the original rules set you selected.
5. If a date lands on a weekend, the date will be moved back one day or forward one day depending on whether your custom amount of days was a "plus" or a "minus" amount of time.
6. You can also add Custom Events as Children and Grandchildren Events within existing Parent Event groupings on the selected rules set. Simply click the **green plus sign** next to a Parent Event on step two and proceed to add dependent events and save.

Creating Custom Rules Sets

There may be times when you wish to calculate legal deadlines for a jurisdiction where the rules set is not included in the online collection. Use the Custom Rules Set feature to create rules sets online in Deadline Assistant. You can save this custom rules set and it will be available for all users when calculating deadlines on any matter.

If a rules set is not available for the jurisdiction of your matter, create a new custom rules set by clicking **New Rules Set** from the Deadline Assistant page in the Administrative section. Type the *Rules Set Name* and click **Save and Continue**. Continue to build the custom rules set by typing in the Parent Event names and any related deadlines that exist in that jurisdiction's rules of court. Add your custom rules for your office as well.

After naming the rules set on step one of the Deadline Assistant Admin, follow these steps:

1. Click **Next** to continue to step two to add Custom Events to the rules set.
2. Select the **Custom Event** button on the top right.
 - a. Name the top level custom event.
 - b. Select **Add Child**.
 - c. Name the Child, or dependent, Event and select the amount of days before or after the Parent Event that the Child Event should occur.
 - d. Verify that you have the correct parent name in the *parent name* field. You can type in the field and press enter and all events in this event grouping will appear, allowing you to select the event that will be the "parent" of the dependent event you are adding.
 - e. You can add as many levels as you want, with each event being dependent upon an event above it, or you may add many Child Events all just below the Parent Event level.
3. The Custom Events added to an existing rules set will account for weekend days, but will not have any holiday accounting when calculating dates. A deadline may land on a court holiday and will not be automatically moved due to the holiday.
4. If a date lands on a weekend, the date will be moved back one day or forward one day depending on whether your custom amount of days was a "plus" or a "minus" amount of time.
5. You can also add Custom Events as Children and Grandchildren Events within existing Parent Event groupings on the selected rules set. Simply click the **green plus sign** next to a Parent Event on step two and proceed to add dependent events and save.

USER MANAGEMENT

There are four tabs available from User Management: Default Matter Permissions, Add Users to Matters, Inactive Users, and My Account.

Default Matter Permissions

Default Matter Permissions allows you to set the default permissions for every user each time a matter is created. The settings can be changed when a matter is created.

- To set the default permission for all users, next to *Set All*, select the role and click **Apply**.
- To set the default permissions for each user, next to their name, select the applicable role and click **Save**.

Adding Users to Matters

1. To add a user to a matter, type their user name. As you type, a list of names display for you to select. You can also use the space bar to show a list of all users.
2. For *Set As*, select the applicable role from the list.
3. If a user is on a matter team, select **Add to matter team**. By selecting this option, the matter will display on the user's My Matters page.
4. Add the user to selected matters.
 - a. Type the matter name, if known, in *Enter a Matter name* and select. The matter displays under Selected Matters.
 - b. Scroll through the list of matters and select; this moves the matter under **Selected Matters**. To narrow the list, you can select a practice area from the list.
 - c. To choose all matters, select the *Select All* check box, and it indicates the total number of matters. After a matter is selected, a green check mark displays.
5. To remove a selected matter, click the red "x".
6. Click **Save**.

Inactive Users

The Inactive Users tab lists users that are deactivated in Deadline Assistant. Inactive users will continue to be displayed in Matter Teams and Calendar Events unless deleted. Inactive users will display with a **Delete User** button. Click to remove the user from the matter team.

My Account

The My Account tab will open a new window. From My Account you can deactivate users, add or delete users, and perform other administrative rights.

LOOKING FOR MORE INFORMATION?

For assistance using Deadline Assistant, call 1-800-937-8529

For free reference materials, visit <http://legalsolutions.thomsonreuters.com/law-products/solutions/deadline-assistant>

