NEW EMPLOYEE TRAINING – ELITE WEBVIEW
INSTRUCTOR OUTLINE

Description	Class typically provided during the first week of employment for new hires
Prerequisites	None
Audience	New Employees
Class Size	Room Capacity
Class Length	1.5 hours (90 minutes)

Objectives	Purpose of WebView
	Understand Basic Terms
	Identify elements of a Diary
	Understand Diary Policy
	Log into WebView
	Manage Timekeepers
	Enter Time Cards
	    Individual entries
	    Multiple entries
	Create Reports
	Use Shortcuts

Materials Needed	WebView Quick Reference Guide [redacted] Paralegal Quick Reference Guide [redacted] WIPS/Proforma Quick Reference [redacted] TIPSheet – Query a Matter in WebView Financial Popup Handout Elite Webview User Guide booklet [redacted]
Notes	• Use the default timekeeper for each training login initially. • Students should add their attorneys as frequent timekeepers if they know who the attorney is.

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WELCOME			
	⌧ **PURPOSE OF WEBVIEW** ⇨ Elite WebView is our time-entry program. Time entries created in WebView are automatically applied to the Elite Professional Billing System for seamless, real-time time tracking. ⇨ WebView is the program we use to identify and track the work that billable employees perform. ⇨ Billable employees include Attorneys, Paralegals and Litigation Technologists. ⇨ Time worked is put into the program daily and time filters into Elite along with other expense such as Equitrac and Necho. From this repository of billable expenses, bills are generated and sent to the client. ⇨ WebView is a diary-entry program. ⇨ A diary is an entry that describes what work the Timekeeper performs. ⇨ A timekeeper is someone who bills the client for his or her time worked. ⇨ A diary is entered into a Timecard in WebView. ⇨ A Timecard list is a list of diaries that reflect a timekeeper's work for the day.		1
DOCUMENTATION REVIEW			
	⌧ **REVIEW THE HANDOUTS THAT ARE PROVIDED TO THE STUDENTS.**	**See "Materials Needed" section on cover page.**	
WHAT DOES A DIARY LOOK LIKE			
	⌧ **DIARY CAN COME IN MANY FORMS** ⇨ Word Document ⇨ Lotus Notes e-mail ⇨ Handwritten Diary Worksheet ⇨ Diary Form in Lotus Notes ▪ If you do receive diaries using this form in Lotus Notes, be careful when copying and		

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	pasting the contents of the narrative to the timecard. Eliminate special characters and paragraph marks prior to copying and pasting. Otherwise corruption of the entry can occur.		
WHAT INFORMATION GOES INTO A DIARY			
	⌦ **DIARY INFORMATION** ⇨ Timekeeper's Name ⇨ Date ⇨ CM Number ⇨ Number of hours worked ⇨ Work Location Code ⇨ Practice Code ⇨ ABA Task and Activity codes (not always) ⇨ Narrative.		
OPEN WEBVIEW			
Have students open IE and go to (http://phwebview/webview). Password is test123 for all training logins. **Secretarial View** train1-train15 **Paralegal View** train20-train22	⌦ **OPEN WEBVIEW** ⇨ Use the Desktop Icon ⇨ Open an IE window and type http://nywebview/webviewsecure ⇨ Use the login information to the left to help each student log into the training database for this program to enter diary information.		
DIARY POLICY			
	⌦ **DIARY POLICY** ⇨ Review the policy ⌦ **FINANCIAL POP-UP** ⇨ Explain how missing diaries show up on the Firm News splash screen daily if this isn't done. ⇨ The daily financial popup has **active links** (in red) for days of missing diaries, unbilled time and accounts receivable.		

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COMPONENTS OF THE WEBVIEW WINDOW			
These areas are only available to Partners, Counsel, and Secretaries.	⌦ **USE THE WEBVIEW MAIN MENU** ⇨ Discuss the main areas on NAV Bar: • **Time Entry:** Daily Time Entry, Weekly Time Entry, Shortcuts/ Dictionary • **Inquiry:** Matter Query, Client Query • **WIPS** / Proforma **Generation** • **Other: Calendar Inquiry** **Other Timekeepers** Home, Help, Logout		5
Review only if paralegals are in attendance.	⌦ **MY TIME BUTTON** **(REVIEW IF PARALEGALS ARE ATTENDING)** ⇨ Provides a view of the sum total of an attorney or paralegal's billable or non-billable hours, for any given specified time range.		
Review only if paralegals or attorneys are in attendance.	⌦ **TO DO BUTTON** **(REVIEW IF PARALEGALS ARE ATTENDING)** ⇨ For Paralegals, the **To Do** list displays missing Diaries. ⇨ For Attorneys, the **To Do** list displays extend events: (a) Accounts Receivable, (b) missing Diaries, and (c) unbilled time. ▪ Partners can use this list to retrieve information from outstanding invoices, that are 30 days or older, as of the previous Friday.		
	⌦ **SELECT A TIMEKEEPER** ⇨ Linked Timekeeper ▪ Secretaries will be linked with **only one** Timekeeper. However, anyone can enter time for anyone else. ⇨ Frequent Timekeeper ▪ The Frequent Timekeepers button is used to manage the timekeepers that appear on this list. We will review the steps for adding names in just a moment.		5

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STATUS OF TIME

- In WebView, time is either unfinalized or finalized.
  - Note: You cannot unfinalize time that is already finalized.
- Buttons at the top will allow you to finalize specific entries or all of the open entries for a month.
- Finalize vs Finalize All buttons
  - When using the Finalize button, you must select specific days prior to using this button. Only the diaries for those days will be finalized.
  - The Finalize All button will finalize the entire month.
- Unassigned Time button
  - Sometimes it is necessary to perform work for which you do not have a billing number.
  - When this is done, you can continue to enter time for the work performed but you will need to use a non-billable number with which to label the unassigned entries.
  - Using those labels, you can assign client matter numbers at a later time.
  - Unassigned time will not finalize.
- Reports button
  - To generate a report for a specific timekeeper, you must be viewing the calendar of the person for which you wish to generate the report.
- Filters
  - There are three different filters
  - The finalized/unfinalized view
  - The billable/non-billable/pro bono view
  - The unassigned view
- Frequent Timekeepers button
  - This list can be managed using the Frequent

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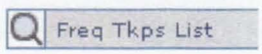
	Timekeepers button. ▪ We will be working with that button in just a moment. ⇨ Navigation for Months/Years. ▪ The drop down arrows and the arrows on the monthly calendar will let you navigate back and forth one month or one year		
	⌧ **WORKING WITH FREQUENT TIMEKEEPERS LIST BUTTON** ⇨ You can control the names that appear on the Frequent Timekeepers drop down menu by using this feature. ▪ Click the  button. ▪ Click the Freq Tkprs link in the top left of the page. ▪ To add a timekeeper, click the Manage Timekeepers tab. ▪ Insert the timekeeper ID or search for it. ▪ Click the Add to List button ▪ To remove a timekeeper, click the Freq Timekeeper List tab. ▪ Place a checkmark next to the desired timekeeper. ▪ Click the Remove Permanently button ⇨ Timekeepers can only be added or removed one at a time. ⇨ You are only deleting them from your frequent timekeepers listing not the billing system.		
UNDERSTAND HOW TO ENTER TIME			
	⌧ **FOR A FREQUENT TIMEKEEPER** ⇨ If entering time for the default, linked timekeeper, click the Daily Time Entry button on the NAV bar to display the necessary calendar. ***Note:*** *Clicking the "Daily Time Entry" button on the Main Menu will take you to the monthly calendar of the* ***linked*** *attorney only.*		

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	⇨ If putting in time for someone other than the linked timekeeper, from the Monthly Time Entry view, use the Frequent Timekeeper list to choose the desired name.		
	⌧ **To Open a Blank Timecard**		
	⇨ Open Daily Time Entry view by clicking the blue bar on the desired date.		
	⌧ **TimeCard View**		
	⇨ Note the split screen.		
	⇨ Blank timecard is at the top and timecard list is at the bottom.		
	⌧ **To Enter Time For Another Timekeeper**		
	⇨ Timekeeper may be **searched for** from the drop-down menu from within an opened Time Entry window. **Click the query ? button.**		
	***** Remember, searches must be done in ALL CAPS (UPPERCASE)**.***		
	⌧ **Understanding Client Matter Numbers**		
	⇨ Each Client generally has one number that is assigned to it.		
	⇨ Cleary may work on several different cases for this client, thus Matter numbers are designed to identify the different cases for which we might represent the client.		
	⌧ **Select Client / Matter Information using Client Matter field**		
Type in number 04296-015	⇨ In Client-Matter field, type matter number **04296-015**. You need to "tab out" of the field.		
	⌧ **Indicate Hours Worked**		
Enter a time amount.	⇨ You enter time in Tenth of an Hour increments or Quarter of an Hour increments.		
	⇨ Clients have requested billing via one or the other and the increments are arranged in advance. Thus this is a locked field in WebView.		
	⌧ **Quick Descriptions**		
	⇨ We do not use this feature. Use the Shortcuts to create your own list of frequently used phrases in the narrative.		

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05IN for Washington Enter narrative as outlined here.	⌧ **WORKING WITH CODES** ⇨ The Timekeeper designates codes and you should be notified if any of these codes are different. ⇨ Enter Work Location and Practice Code. ***Note:*** location field will be filled in automatically. ▪ Location for [redacted] is = [redacted] (for tax purposes) ⇨ ABA Task Code is only required by certain clients. ⌧ **HOW TO HANDLE E-BILLING CLIENTS** Some of our major clients are now requiring e-billing, which means a **Task Code** and **Activity Code** must be supplied with each Diary. ⇨ Block Billing is defined as the combining of different tasks in the same Timecard. ⇨ For some of our clients, this is not a problem. ⇨ There are a few clients however who have ebilling systems designed to reject bills which contain expenses where multiple tasks are performed. ⌧ **IDENTIFY E-BILLING CLIENTS** ⇨ The clients that are requiring these new codes are: [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], [redacted], and [redacted]. *Refer to "Client Requirements for Time Increments…." handout on* [redacted]. **Offices>Firm General>Billing Policies** ⇨ This handout is always subject to change. You should double-check it on the Intranet every so often. ⌧ **TASK & ACTIVITY CODES** ⇨ This client, [redacted] requires both a Task and Activity Code: Enter narrative: *E-mails w/* [redacted] *Attorney re: Hybrid capital deal; review of termsheet related to same; e-*		

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Then describe how narrative needs to be broken up as defined here.	*mails w[redacted] Attorney re: same and re: common share ownership of trust consideration of tax issues related to treatment of interest* ⌧ **AVOID BLOCK BILLING** ⇨ The above narrative needs to be broken into 2 separate diary entries: *Draft e-mails with [redacted] re: [redacted] capital deal and re: common share ownership of trust consideration of tax issues related to treatment of interest.* ***[P200/A105]*** *Review of termsheet related to [redacted] capital deal and re: common share ownership of trust consideration of tax issues related to treatment of interest.* ***[P300/A104]*** ⌧ **SPELLCHECK THE NARRATIVE** ⇨ Spell Check **does not run** automatically, upon clicking "Add" button. ⌧ **SAVE THE TIME ENTRY** ⇨ Click the **Add** button (or **Ctrl+S**). ⇨ The time entry now displays in the Timecard List, below the calendar.		
UNDERSTANDING THE TIMECARD LIST			
	⌧ **EXPLORE THE TIMECARD LIST** ⇨ The Timecard List displays in the bottom section of the Daily Time Entry View, showing an entire day's entries. ⇨ The Timecard List displays **both finalized (red** hyperlink) and **unfinalized (blue** hyperlink) **time.**		
Click an index number to show the contents of an unfinalized entry.	⌧ **MODIFY A TIME ENTRY** ⇨ Click the **index number** of the timecard you want to modify. The timecard displays in the main time entry area for editing. ⇨ Click **Update** to save any changes.		2
Demonstrate copying a timecard. Save it to a different date.	⌧ **COPY A TIMECARD** ⇨ To copy a time entry, ⇨ Click the icon to the right of the index		4

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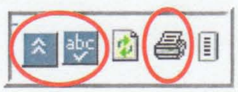
	number of the timecard you want to duplicate. *All fields defined in the timecard display in the time entry fields.* ⇨ Edit the Narrative and click Update to save any changes.		
Delete an entry for demonstration purposes.	⌧ **DELETE TIME** ⇨ Only unfinalized time entries can be deleted. ⇨ **Click the index number** corresponding to the time entry (timecard) you want to delete and click Delete.		
We are discussing 3 of the 5 icons because the other 2 are not very useful.	⌧ **DISCUSS THE TIMECARD ICONS** ⇨ Briefly discuss three of the 5 icons:  ⇨ **The show/hide timecard view** – collapses the split screen, taking away the balnk timecard and showing you only the timecard list for the day. ⇨ **The Spellcheck button** – spellchecks all timecards in the timecard list for that day. ⇨ **The Print button** – Prints a horizontal report for the entire day only. To print more than one day of diaries, use the Reports button (to be explained later in this course). ⇨ Remember to change the page to landscape when printing reports.		
Open a finalized time entry to demonstrate editing the narrative.	⌧ **FINALIZE TIME** ⇨ Click the "Calendar" button to return to the Monthly Time Entry View of your attorney. ⇨ Review **Finalize** process. ***Note:*** *Finalized time **cannot** be unfinalized.* ***Note:*** *the **Narrative of a finalized time entry** can be **edited**, until the client has been billed.*		
USE THE WEEKLY TIME ENTRY FUNCTION			
	⌧ **TO ENTER TIME ON A WEEKLY BASIS** ⇨ Click the **Weekly Time Entry button** (notice attorney name is back to default timekeeper).		

[redacted]

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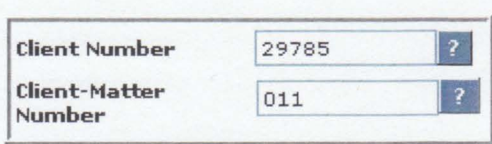
	⇨ To enter time for a different timekeeper, change the timekeeper number in the timekeeper field. ▪ In **Client Matter** field, type 91000-000 ▪ Enter a Narrative. ("Vacation.") ▪ Enter Practice Code (znb) ▪ Enter daily time amounts under the appropriate day. *Time amounts for Monday thru Friday: 0,0,0,0,0* ▪ Use the **Add** button (this saves the time, as well as totals it). ▪ Instead of adding the time though, click the Edit Narratives button to demonstrate editing the narrative for multiple entries.		
CREATE REPORTS			
Use the date range of current month unless there ar eno entries. Have student generate a report with some entries in it.	⌧ **GENERATE A TIME ENTRY REPORT** ⇨ To display the number of hours an attorney has worked on one or many Matters, generate a report. ⇨ **Click CALENDAR BUTTON** to return to the monthly calendar of your default attorney Timekeeper: ⇨ Choose **Reports button** from the Monthly Time Entry window. ⇨ Report will be generated for the timekeeper whose calendar you were just viewing. ⇨ Enter a C/M in the Client-Matter Number field.		
This will NOT work	 *If you use the ? query button, **use the Client-Matter Number field**, to search for a specific matter.* ⌧ **PRINT DIARIES BY ENTRY ORDER** ⇨ Under Subtotal Options, select either Daily Subtotal or Daily Billable/Non-Billable Subtotal		

[redacted]

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Choose Daily Subtotal; Billable; Non-billable; Finalized; Unfinalized; Timecard Narrative; and Date Worked sort order. **Print out several copies of the report to show what one looks like.**	⇨ Under Display Options, select Timecard Narrative. ⇨ Select a **Primary Sort** and **Secondary Sort** as needed. ⇨ Click the **Create Report** button. ⇨ Click the **Printer icon**. ***Note:*** *If you want to sort the entries in order of how they were put into WebView, you can choose **Primary Sort** by **Index** number.* ***Note:*** *If no Subtotal option is chosen, or if Client or Matter Subtotal options **are** chosen, there will be **no separator lines** in the Report.* ☒ PRINT ENTRIES ⇨ *A Report is the best way to print a Time Entry.* ⇨ Use Printer icon . ⇨ Remember to print reports in landscape to ensure that no data is cut off.		3
USE AND CREATE PERSONAL SHORTCUTS			
Create a shortcut using the individual's name. Names should be entered with First initial, period and last name. **Use the shortcut just created.**	☒ CREATE PERSONAL NARRATIVE SHORTCUT ⇨ **Users can create their own shortcuts for the Narrative field by using the Shorcuts/Dictnry button.** ⇨ On the WebView Main Menu, select **Shorcuts/Dictnry** button. ⇨ In the Word/Shortcut Code text box, type the shortcut. ⇨ Select an Action from the drop-down menu. ⇨ Type the expanded phrase in the Replacement text box. ⇨ Click the SAVE button. ☒ USE A PERSONAL NARRATIVE SHORTCUT ⇨ Copy another timecard and use the shortcuts in the narrative field. ⇨ **To expand** a user-defined shortcut in the Time Entry narrative field, **click the spellcheck button.**		

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INQUIRY BUTTONS UNDER "OTHER" ON MAIN MENU			
	⌦ **OTHER TIMEKEEPERS** ⇨ Use the **Other Timekeepers** button to search for another timekeeper, who is not one of your Frequent Timekeepers *(to view their calendar or run a Report).* ⇨ You **cannot enter time** from this view. You may only view time and print reports. ⇨ Reports on multiple timekeepers or with multiple client/matter numbers should be requested from accounting.		

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