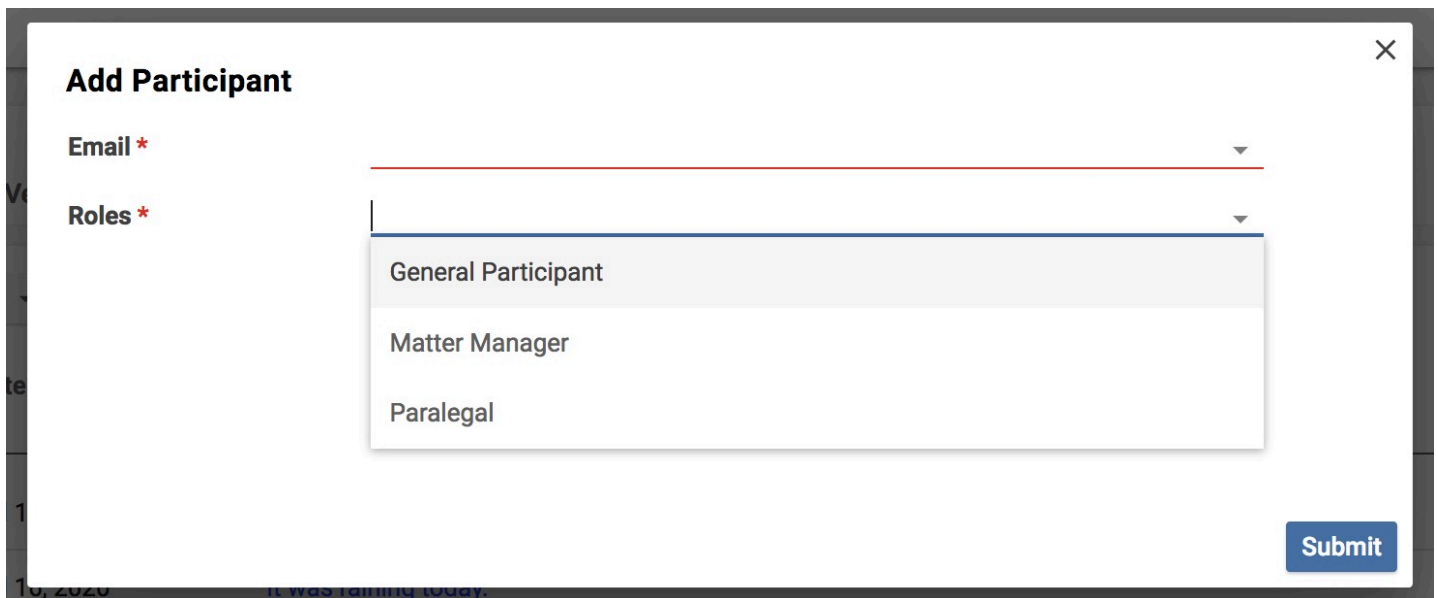# Common Actions on a Matter

Add Participant

Add a participant to a Matter Record using the **Add Participant** button. Adding participants to a Matter will notify them of Matter updates, changes and grant them certain permissions on the Matter.

General Participants, Matter Managers, and **Paralegals** have the ability to:

- View the Matter
- Edit the Matter
- Add comments
- View the Matter History
- Change the Matter phase
- Add Key Dates / Statuses / Documents / Vendors / Contacts / Tasks

Enter the participant's email and choose their role from the dropdown list, then click **Submit** to add them as a participant.

Add Contact Involved Party

Adding Contacts to the Matter Record keeps important contacts, such as plaintiffs, defendants, and witnesses close at hand. To add a Contact Involved Party use the **Add Contact Involved Party** button under **More Actions.**
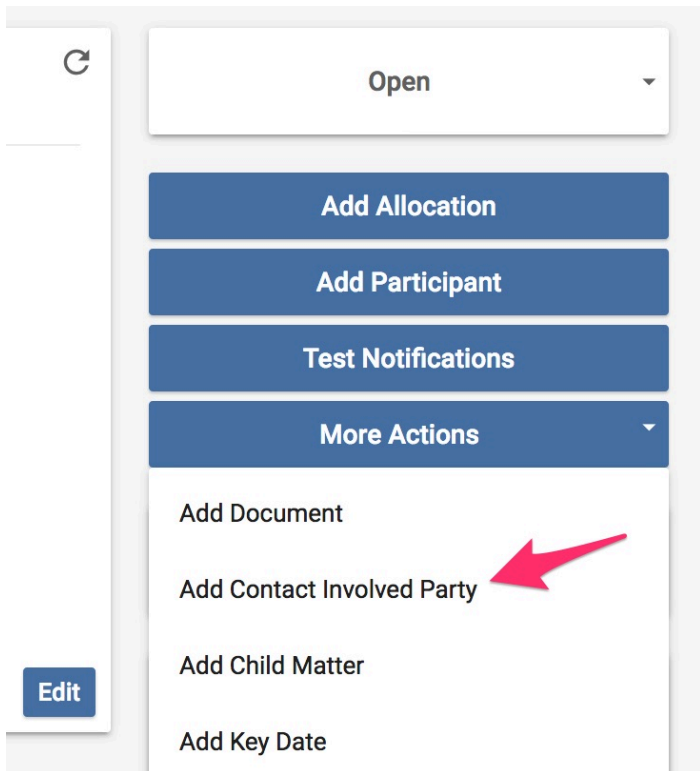
The following out-of-the-box roles will be available for contact classification (your environment may contain additional roles):

Company / Entity:

- Co-defendent
- Defendent
- E-discovery Company
- Insurance Company
- Plantiff

Court:

- State Court
- Federal Court

Person:

- Claims Adjuster
- Co-defendent
- Defendent
- Defense Counsel
- Employee
- Expert Witness
- Judge
- Neutral
- Plantiff
- Plantiff's Counsel

Contact Involvement to Matter

Add Involved

Contact Type *	
	Company/Entity
	Court
	Person

Click **Submit** to add the Contact.

Add Task

To create a task click the **Add Task** button under **More Actions**.

Open

Add Allocation

Add Participant

Test Notifications

More Actions

Add Document

Add Contact Involved Party

Add Child Matter

Add Key Date

Add Status

Add Task

Fill in all the information and click **Submit Task** to create the task. The assignee will be notified on task creation and on the task due date.
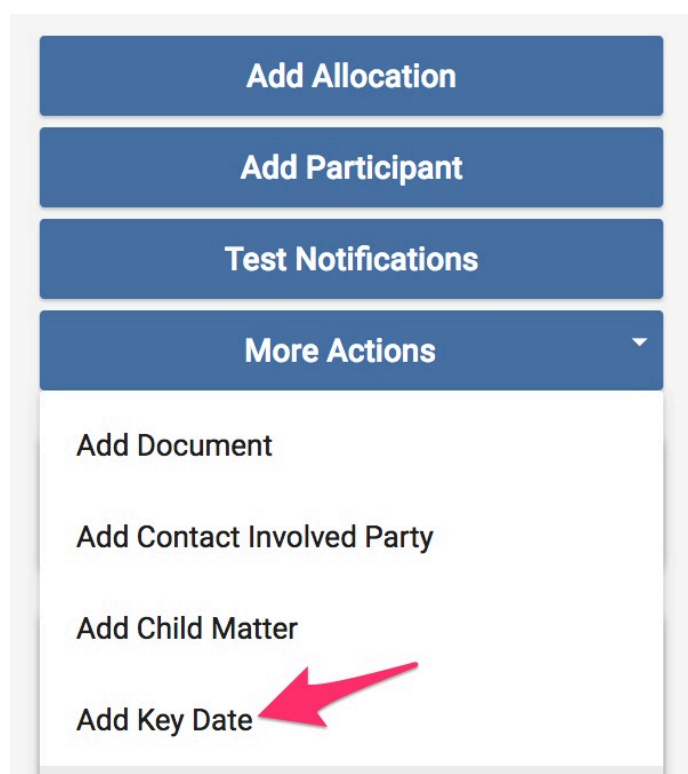
Tasks

Create Task

Task *
_____
Task is required

Assignee *   Ont MM New Admin   ▾

Due Date *   7/17/2020   📅   4:00 AM   ⏱

Description
_____

Add Key Date

Key Dates allow users to keep track of important dates, such as the Trial date. To add a new Key Date choose **Add Key Date** from the **More Actions** dropdown.

Fill in the appropriate information and click **Submit Key Date** to create the Key Date.

Key Date

Create Key Date

Event Type *

Date *   M/D/YYYY

Description *

Once created, key dates are visible under the Key Dates tab.

	Event Type - Date	Date ↓	Description
☐	Discovery Closes - 02/14/21	Feb 14, 2021	Discovery Closes
☐	Trial - 07/31/20	Jul 31, 2020	Trial date

Summary   Vendors (1)   Documents (3)   Statuses (3)   **Key Dates (2)**

Actions

Add Status

Participants on a Record can keep up-to-date with activity on a matter via the Status App. You can add a status to any Matter via the **Add Status Button** under **More Actions** dropdown.

Anyone can add a status via this form as long as the matters Phase is **Open**.

Status

Create Status Report

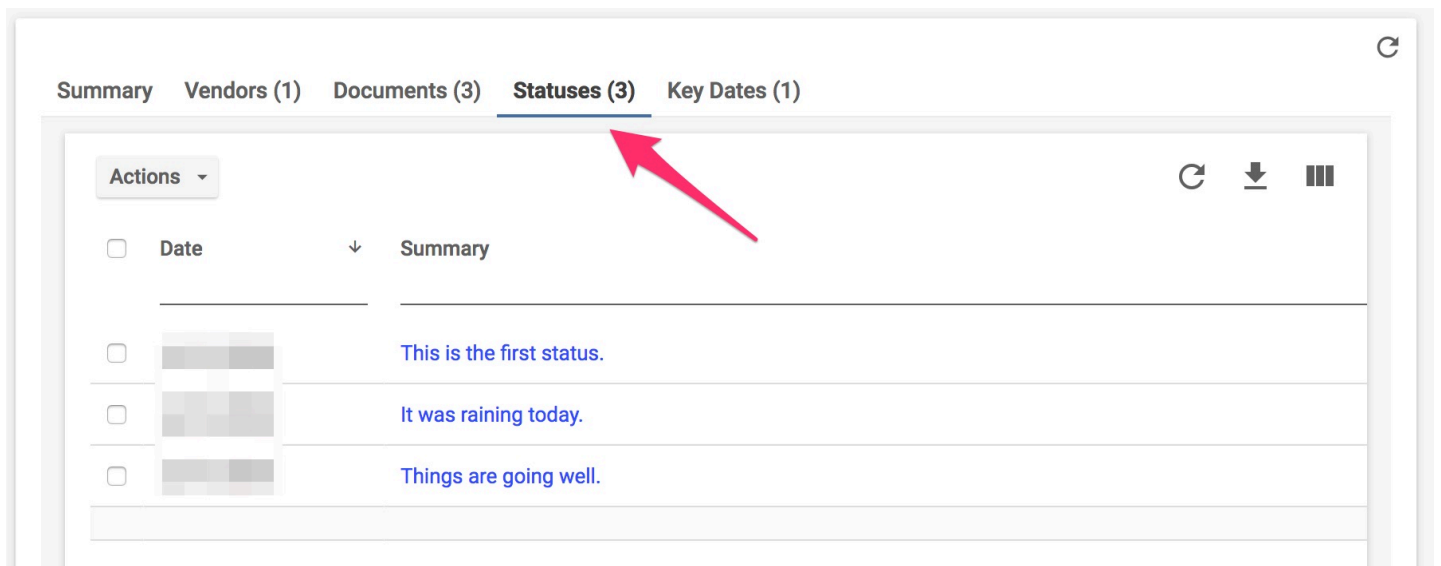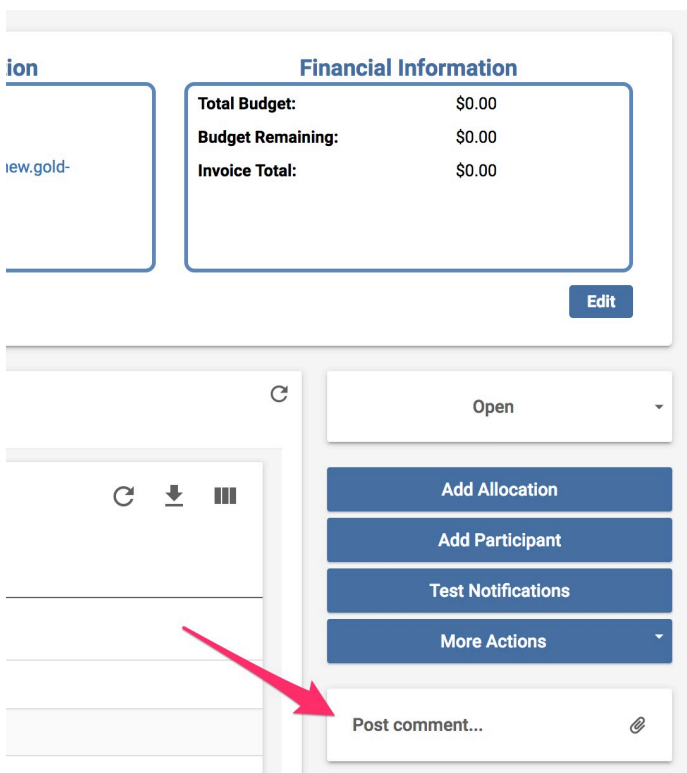|	
Date *	[blurred] 📅
Current Status *	

Once submitted, the Status is added to the Statuses Panel on the Matter Record.

Add Comment

To add a comment to the Matter choose **Post Comment** on the right-hand side of the screen.

When adding a comment Onit allows users to choose who they wish to notify. They also have the ability to add an attachment. Attached documents cannot exceed 250 MB in size.

Once the comment has been published it will become visible in the **Activity** panel.

Add Document

To add a document to the Record click the **Add Document** button from the **More Actions** dropdown.
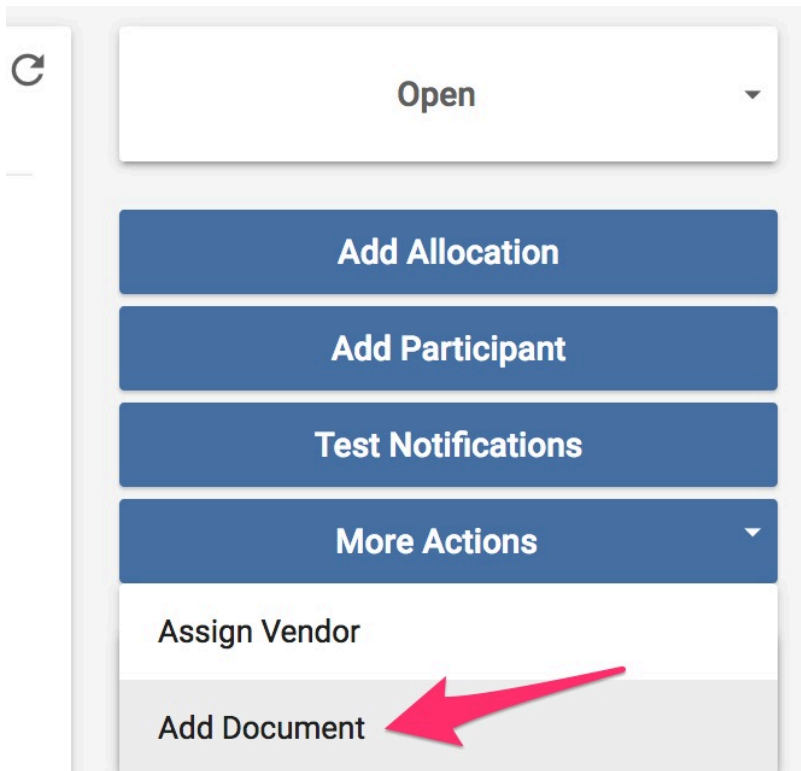
Click **Submit** to upload the document.

Document

Add Document

Original Attachment *	Click or drag here to attach a file.
Document Type	
Comments	
Private	☐

Once uploaded documents are visible and available for download from the **Documents** tab.

| | Summary | Vendors (1) | **Documents (3)** | Statuses (3) | Key Dates (2) |

Actions ▾

☐	Download Link	Document Name	Current Version	Number of Versions	Lock Status	Commer
☐	Document 58071	Document 58071	1.0	1	Unlocked	
☐	Document 58067	Document 58067	1.0	1	Unlocked	
☐	Document 58059	Document 58059	1.0	1	Unlocked	