



Attorneys. Advisors. Advocates.

my.DrewMcCallum.com

Quick Reference Guide

Accessing and Using Your Client Portal

Introduction to my.DrewMcCallum.com

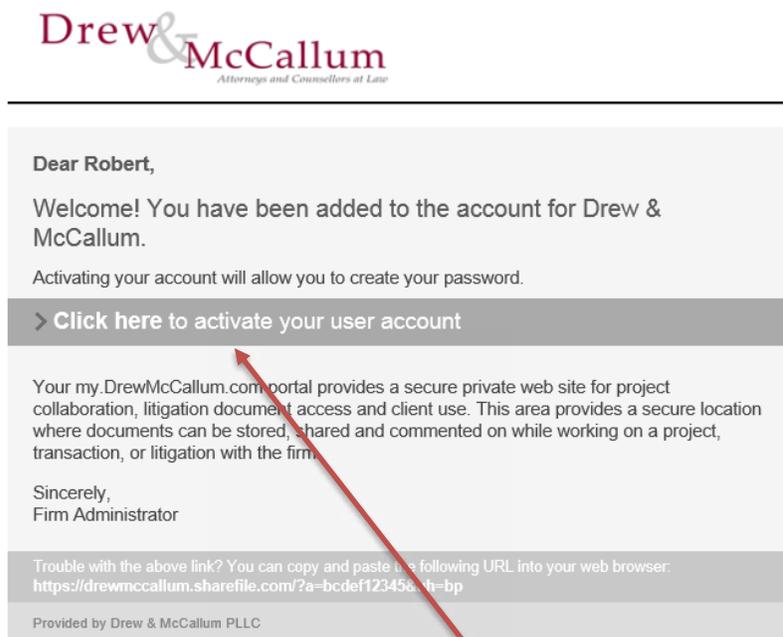
Welcome to your client portal at Drew & McCallum! **my.DrewMcCallum.com** provides a secure private web site for project collaboration, litigation document access and client use. This area provides a secure location where documents can be stored, shared and commented on while working on a project or litigation with the firm. The examples in this guide show one version of a litigation client portal, but the client portal is highly flexible and is also used for business transactions and negotiations, real estate negotiations and closings, construction project files, HOA matters, estate planning drafting, and many other legal matters.

The client portal allows Drew & McCallum to offer greater savings to clients (for example: fewer faxes, overnight deliveries, couriers, less time in transit, central information repository) and enhanced "on-demand" service. Your name, password and the documents uploaded to your private web site are encrypted when they travel across the Internet and while they are hosted in the client portal.

Whether used by clients, consultants, co-counsel, opposing counsel, or a combination of clients and professionals, access to my.drewmccallum.com is a part of Drew & McCallum's customer service commitment to our clients, and this service is provided to our clients at no cost.

Getting Started with my.DrewMcCallum.com

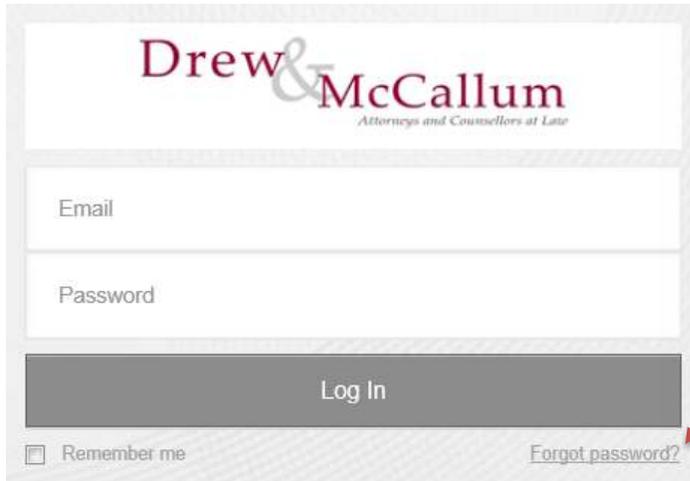
You will receive an e-mail (at the e-mail address you provided) from Drew & McCallum containing a link which will guide you through your 1-step account creation. Your my.drewmccallum.com account will contain sensitive, confidential and legally privileged information. Therefore, when you create your password for your my.drewmccallum.com account, please do not use a password that can be easily guessed or that has been used for any other online account.



Click where indicated in the welcome e-mail to create your account password and enter your portal.

Resetting Your Login Information

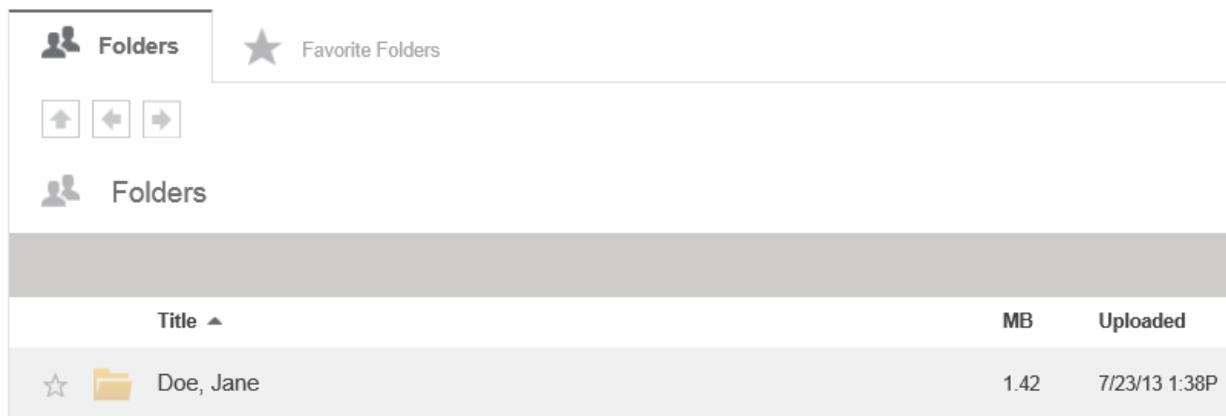
If you forget or need to reset your my.drewmccallum.com password, simply click on the “Forgot Password?” link at the bottom of the login screen. Your password is not known or stored by Drew & McCallum.



The screenshot shows the login interface for Drew & McCallum. At the top is the company logo. Below it are two input fields: "Email" and "Password". A dark grey "Log In" button is positioned below the password field. At the bottom left is a "Remember me" checkbox, and at the bottom right is a "Forgot password?" link. A red arrow points from the top right towards the "Forgot password?" link.

Viewing Files

After logging in, you will see a screen with tabs labeled “Folders” and “Favorites.” On the “**Folders**” tab you will see a file folder with your first and last name. This is your private area, and you are the only user, besides members of the firm, who is able to view the documents located here.



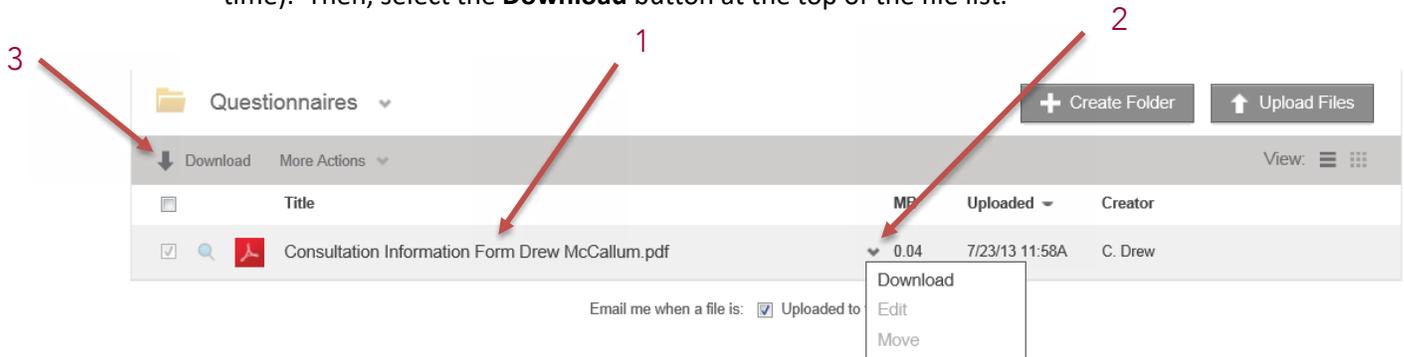
The screenshot displays the file management interface. At the top, there are two tabs: "Folders" (selected) and "Favorite Folders". Below the tabs are navigation arrows (up, left, right). Under the "Folders" tab, there is a list of folders. The first folder is "Doe, Jane", which is highlighted. The folder name is preceded by a star icon and a folder icon. To the right of the folder name, the size "1.42 MB" and the upload date "7/23/13 1:38P" are displayed.

Title ▲	MB	Uploaded
☆  Doe, Jane	1.42	7/23/13 1:38P

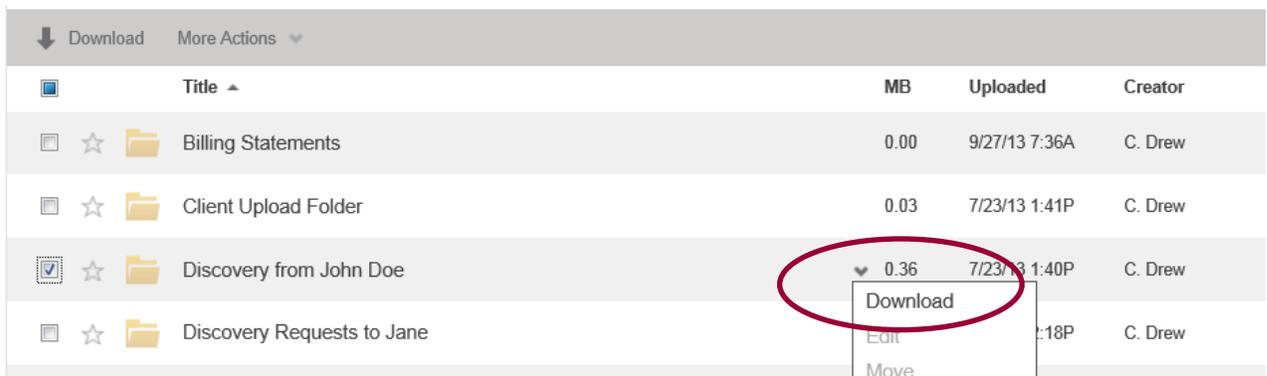
Downloading a File or Folder

Files saved at my.drewmccallum.com can be downloaded in many easy ways:

- 1 Simply click on the file name, and your browser will prompt you to download the file.
- 2 Hover your mouse over the down arrow following the file name and select **Download** from the drop down menu.
- 3 Click on the **check box** next to the file you want to download (you may check more than one file at a time). Then, select the **Download** button at the top of the file list.



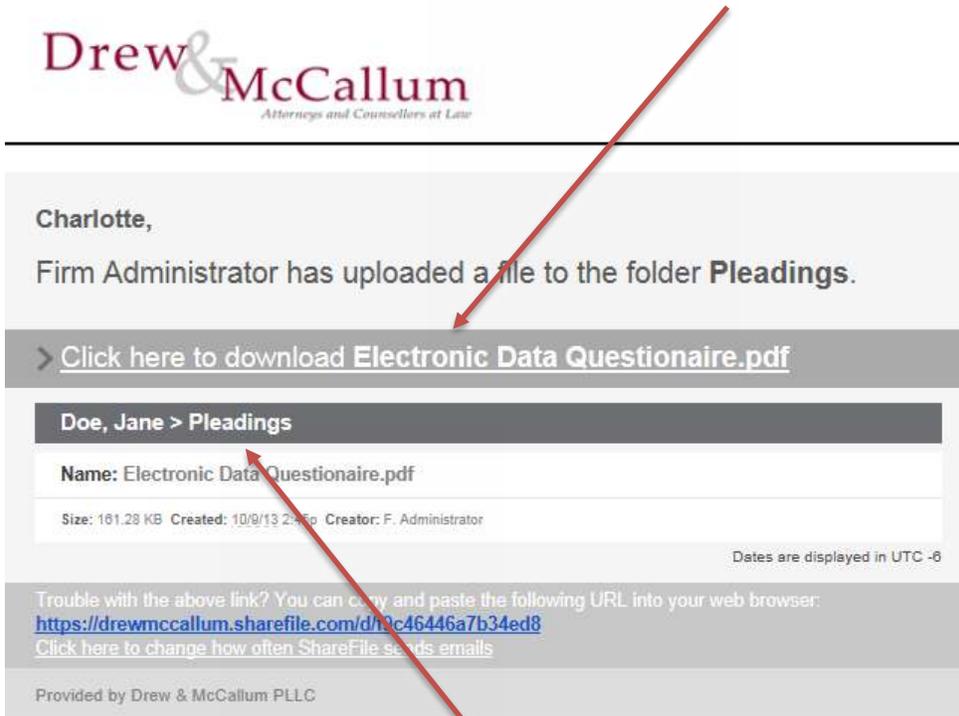
You can also download an entire folder (including embedded folders). To download an entire folder, hover your mouse over that folder name and select **Download** from the drop down menu.



Notification E-Mails

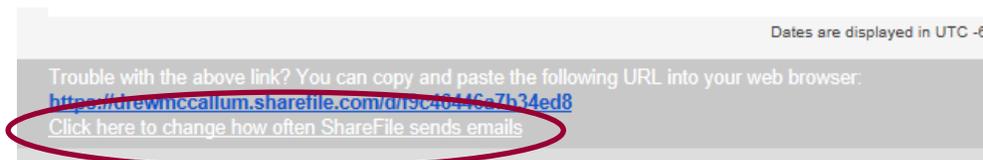
Every time a file is uploaded to your portal, you will receive an e-mail notification. Your e-mail notification will resemble the e-mail below.

Click on the download link to go straight to a download page for the newly uploaded file(s). *Note: this download page will not give you access to your full portal.*

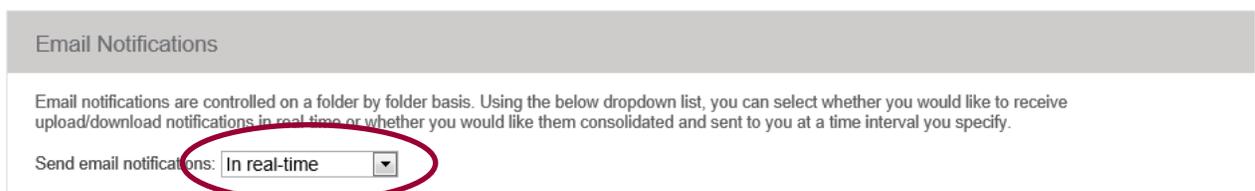


You can also click on your name and/or the folder name to log in directly to your full portal and view all portal files.

You can control the number and frequency of e-mail notifications you receive. E-mail notification settings are accessed at the bottom of any e-mail notification or through My Settings in the top left corner of your portal.



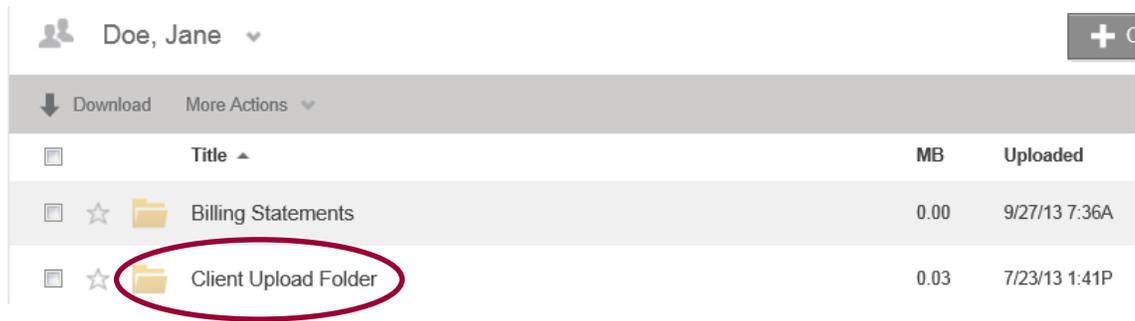
E-mail notifications can be set to be received: in real time, every 15 minutes, every hour, twice a day, or once a day.



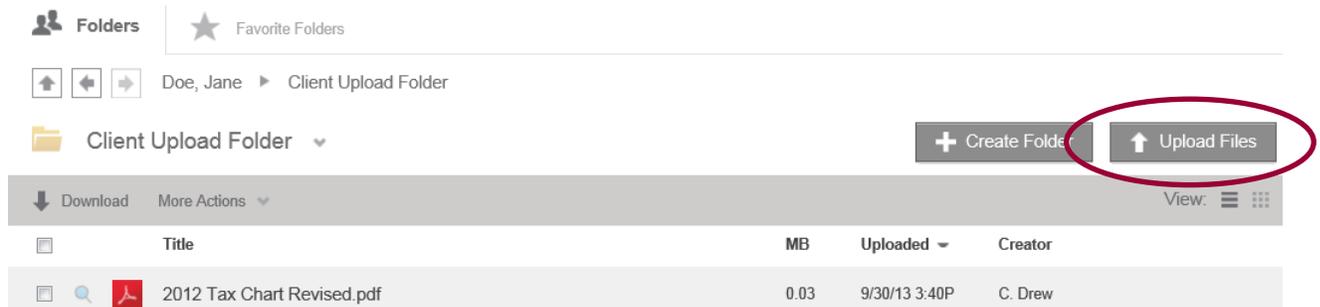
Uploading a File – 4 easy steps

Instead of sending a regular e-mail attachment or burning a disc with your documents, my.drewmccallum.com allows you to upload files up to 10 GB to your client portal. Uploading one or more documents only takes 4 simple steps:

- 1 Log in to your my.drewmccallum.com account and open the folder named “**Client Upload Folder.**”



- 2 Click on the **Upload Files** button in the top navigation bar. An Upload Files form will open.



- 3 Click on “**Choose Files**” button and select files from the dialog window that pops up. **To upload multiple files from the same folder**, hold down the Shift or Control key while selecting files. **To upload multiple files from different folder locations**, simply use the “Choose Files...” button until all of your files have been selected.

Upload Files to "Client Upload Folder" Folder

To upload, click the 'Choose Files...' button and select files from the dialog window that pops up. To upload multiple files from the same folder, hold down the Shift or Control key while selecting files. To upload multiple files from different folder locations, simply use the 'Choose Files...' button multiple times.

Interested in uploading files larger than two gigabytes (2 GB), entire folders, or using drag and drop? Switch to the [Java Uploader](#).

Alternatively, if you are having problems uploading, try our [Standard Uploader](#).

Navigating away from the current page will cancel the current upload.



Once you have selected your file(s) for upload, a document title will be created for you based upon the file name. Optionally, you may edit the title of the document.

- 4 After you have selected your file(s), click the **Upload Files** button. This will begin the file transfer. As soon as the upload completes, an email will automatically be sent to the firm letting us know that you have uploaded file(s) requiring our attention.

Files: Parties & Children Questionnaire.pdf

Choose Files

Remove

Title: Parties & Children Questionnaire.pdf

Details: (0/1000)

Send email notifications when this upload finishes

Upload Files Cancel

Organizing Your Files and Creating Folders

You are able to add folders to your client file by clicking on the **“Create Folder”** tab located at the upper right hand corner of the screen.

Folders Favorite Folders

Doe, Jane > Client Upload Folder

Client Upload Folder

+ Create Folder Upload Files

Download More Actions View: [icon]

Title	MB	Uploaded	Creator
2012 Tax Chart Revised.pdf	0.03	9/30/13 3:40P	C. Drew

On the Add Folder form that opens, type a name for your new folder. Optionally, you may also enter a description for the folder, which will be displayed as a note attached to this folder in your account.

Is There an App for That?

Yes! my.drewmccallum.com has apps for your iPhone, iPad, Android, Windows phone, and Blackberry. Also available are desktop apps for both PC and MAC and a mobile site (for access on the go without installing an app).

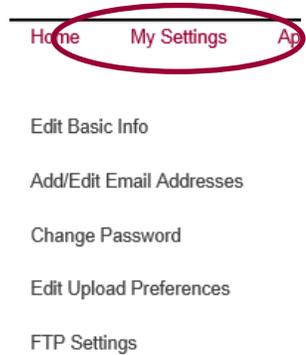
To access these apps, login to your my.drewmccallum.com account and click on the **“Apps”** link in the upper left-hand corner. You will be directed to a page listing all of the currently available apps, descriptions for each and download links. All of the apps are provided free of charge to the client.



Frequently Asked Questions

- 1 How do I update my e-mail address or change my password? Can I have my.drewmccallum.com notifications sent to more than one e-mail address?

You can update your primary e-mail address through **My Settings** in the upper left corner of the screen. You can also add additional email addresses at which you want to receive my.drewmccallum.com notifications. **My Settings** will also allow you to change your password and other basic settings of your account.



- 2 Can I grant access to my.drewmccallum.com to my business partners, co-workers, a family member, friend, financial advisor or other person?

With your prior permission, we can grant access to one file, one folder or your entire my.drewmccallum.com account to anyone of your choosing. This is often useful when multiple individuals are negotiating or collaborating together regarding a document or transaction. Drew & McCallum can also leave your account intact and create a separate account with different users solely for collaborative purposes. Confidentiality and legal privilege issues must also be considered in granting access to others. Only the firm can grant access to new users and create new my.drewmccallum.com sites, so please contact the firm to discuss your ideas and needs.

- 3 How do I control e-mail notifications from my.drewmccallum.com?

Under **My Settings**, you can choose whether you want to receive my.drewmccallum.com notifications in real time, every 15 minutes, every hour, twice a day or once a day. You can also turn automatic upload notifications off by unchecking the box at the bottom of the folder/document list. If you do not want to ever receive notifications from my.drewmccallum.com, please contact the firm directly.

