elsie

WALKTHROUGH FOR FIRST-TIME USERS

Legal help, from request to answer.

A step-by-step tour of Elsie. See how a unit asks for legal work and how counsel takes it on. Every hour ends up in one monthly statement.

VERSION
2.0 · 5 Nov 2026

FOR
Unit heads, counsel and the GC

WALKTHROUGH
17 steps, 5 parts

SIGN IN AT
elsie-psi.vercel.app

WHY ELSIE

Legal requests deserve the same clarity as any other work.

TODAY

Requests reach the GC by email, chat and the hallway. Nobody outside the legal team can see where a request stands, who has it, or what it will cost.

WITH ELSIE

Every request becomes a matter with an owner, a deadline and a meter. Units see their own work. Counsel and the GC see all of it, and every hour flows into one monthly statement.

Four numbers to know before you start.

1 hr

For the GC to acknowledge a new request

24 hr

To an answer or a plan

1 ✧

One legal token is one hour of counsel time

6

Items on the legal menu, each at a fixed price

The service level and the menu are set by the GC in admin. These are today's settings. Dollar figures in the alpha are examples.

WHAT YOU CAN DO

Everything the walkthrough puts into practice.

Every email triaged 01

Each unit's legal@ email lands in one Inbox, and the sender gets a receipt.

One record per matter 02

Comments, progress, documents and a closing note, read by both sides.

Order from the legal menu 03

Common work has a fixed price and scope. Ordering opens a matter at once.

Flag what's urgent 04

Mark urgent puts a request at the top of the list.

Tokens for work, dollars for billing 05

Dashboards count tokens. Statements and prices are for the GC and the client.

Monthly statements 06

One per client. Every fee traces back to a matter. CSV or PDF.

Seventeen steps in five parts.

1

PART ONE · EVERYONE

Get started

1 Sign in
2 Meet the welcome
3 Take the tour

2

PART TWO · UNIT HEADS

Ask for legal help

4 Start from your dashboard
5 Request legal work
6 Follow your matter
7 Watch the board
8 Read the monthly statement

3

PART THREE · COUNSEL AND THE GC

Work matters

9 Triage the Inbox
10 Handle an email
11 Work your matters
12 Move a matter forward
13 Keep the unit in the loop

4

PART FOUR · THE GC

Run the practice

14 See what needs attention
15 Prepare the client meeting
16 Set billing and read statements

5

PART FIVE · EVERYONE

Get help

17 Get help any time

01

PART ONE · EVERYONE

Get started

Sign in, meet Elsie and take the short tour. This part is the same for everyone.

1 **Sign in**
2 **Meet the welcome**
3 **Take the tour**

PART 1 · GET STARTED

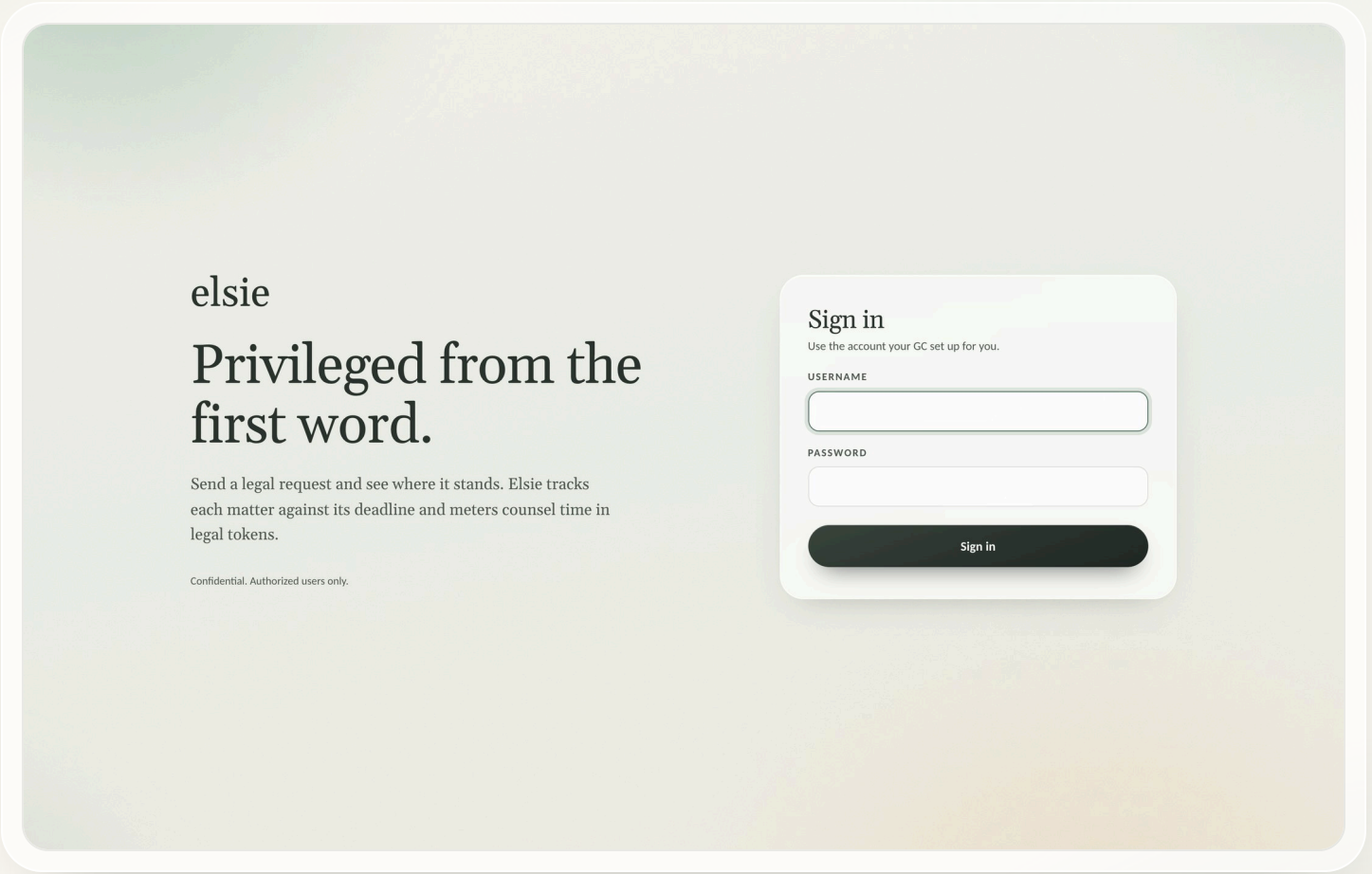
Sign in

WHAT YOU DO

Go to elsie-psi.vercel.app and sign in with the username and password the GC sent you.

WHY IT HELPS

Elsie holds privileged matters. After 10 wrong passwords, sign-in pauses for 15 minutes. A session ends after 12 hours without activity.



PART 1 · GET STARTED

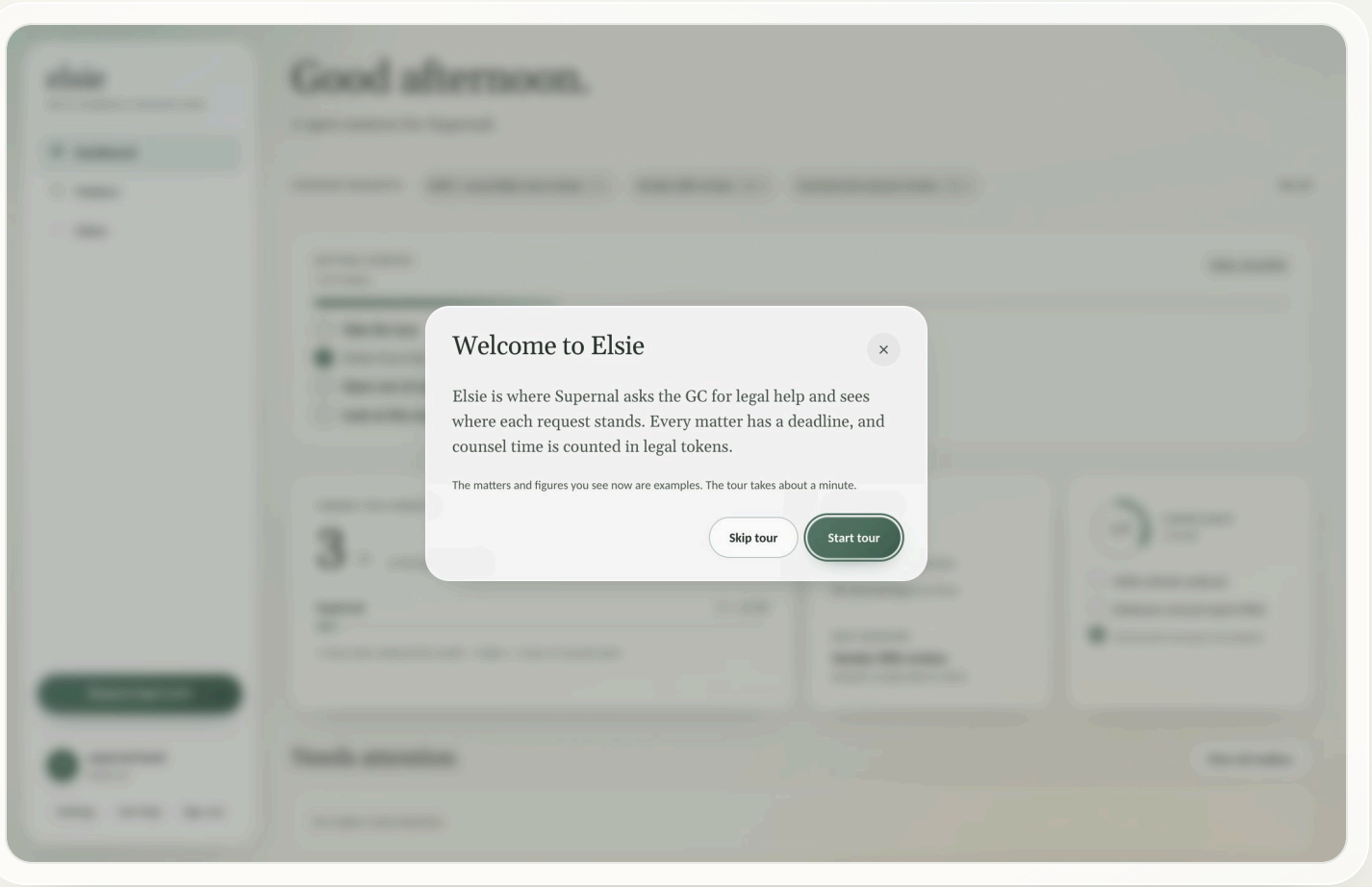
Meet the welcome

WHAT YOU DO

The first time you sign in, a short welcome explains what Elsie does for your role. Choose **Start tour**, or **Skip tour**.

WHY IT HELPS

It shows once. You can replay the tour from Help whenever you like.



3 / 17

PART 1 · GET STARTED

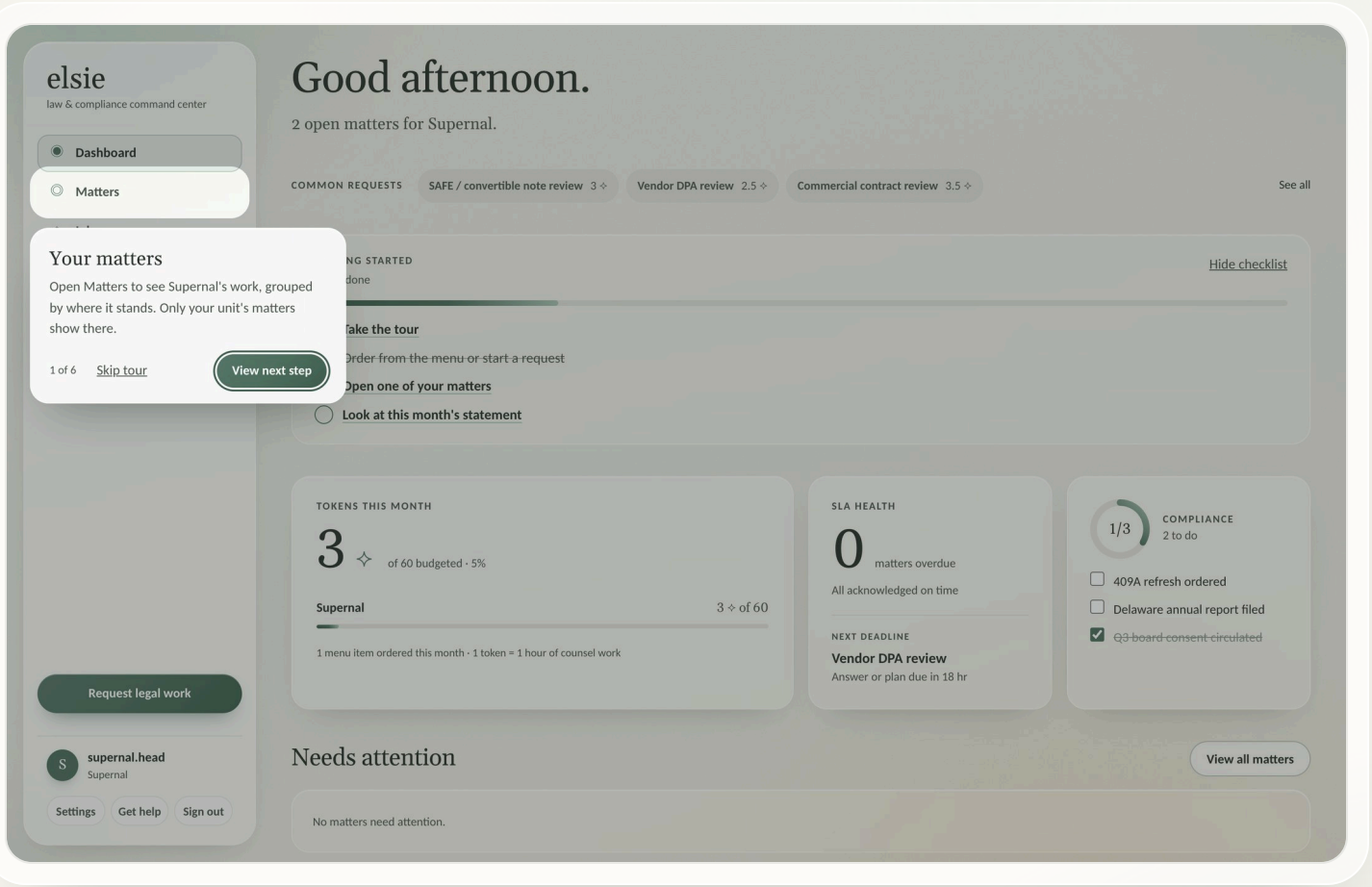
Take the tour

WHAT YOU DO

Each stop points at a part of Elsie you'll use. Choose **View next step**, or press Esc to leave.

WHY IT HELPS

It takes about a minute and works with the keyboard alone.



02

PART TWO · UNIT HEADS

Ask for legal help

How a unit head asks for legal work, follows it and reads the statement.

4 Start from your dashboard
5 Request legal work
6 Follow your matter
7 Watch the board
8 Read the monthly statement

PART 2 · ASK FOR LEGAL HELP

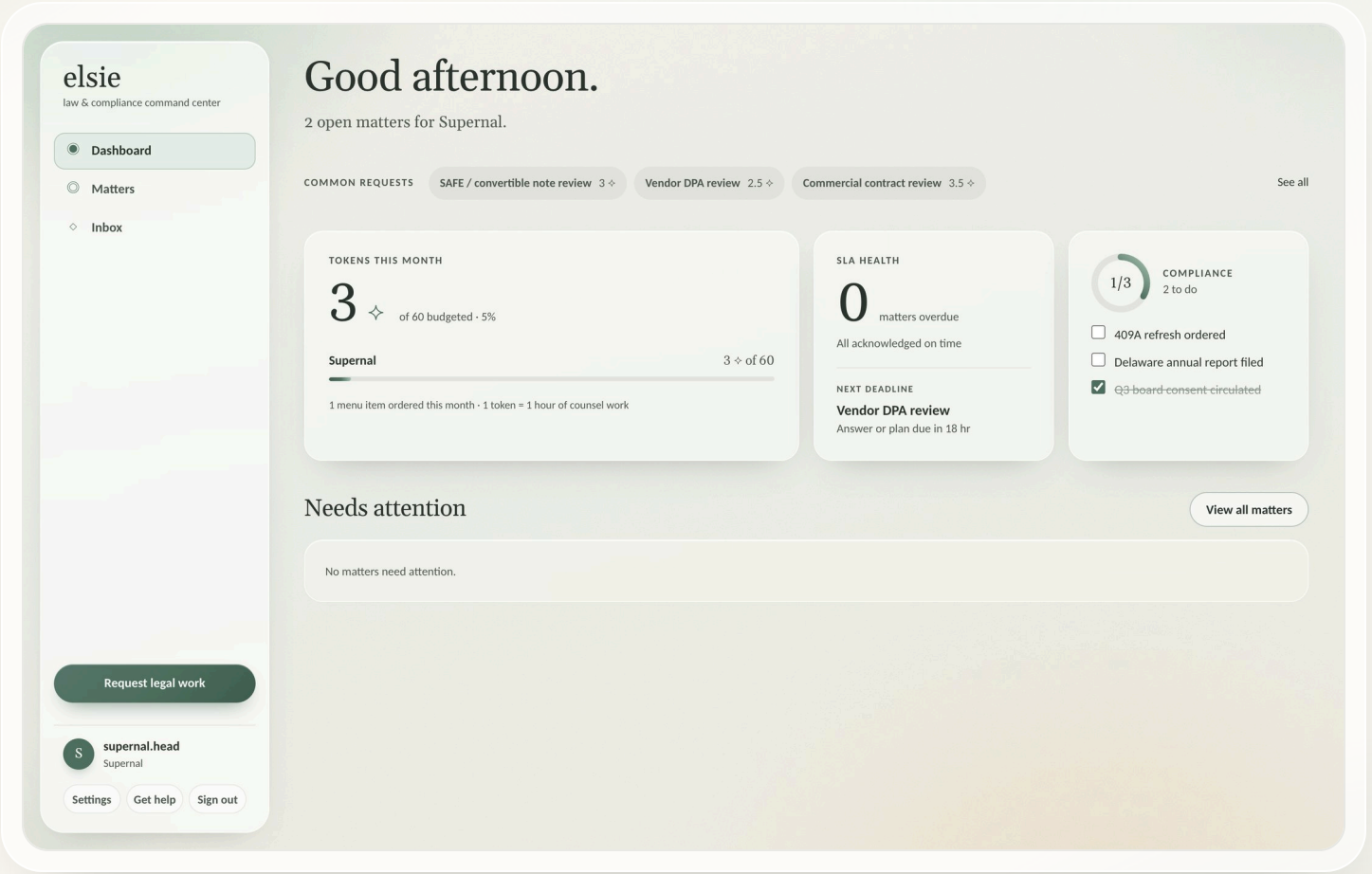
Start from your dashboard

WHAT YOU DO

Your most-ordered requests sit at the top. Below them: tokens this month, SLA health, compliance and what needs attention.

WHY IT HELPS

Choose a common request to order it in one step. The dashboard counts work in tokens; dollars stay on statements.



PART 2 · ASK FOR LEGAL HELP

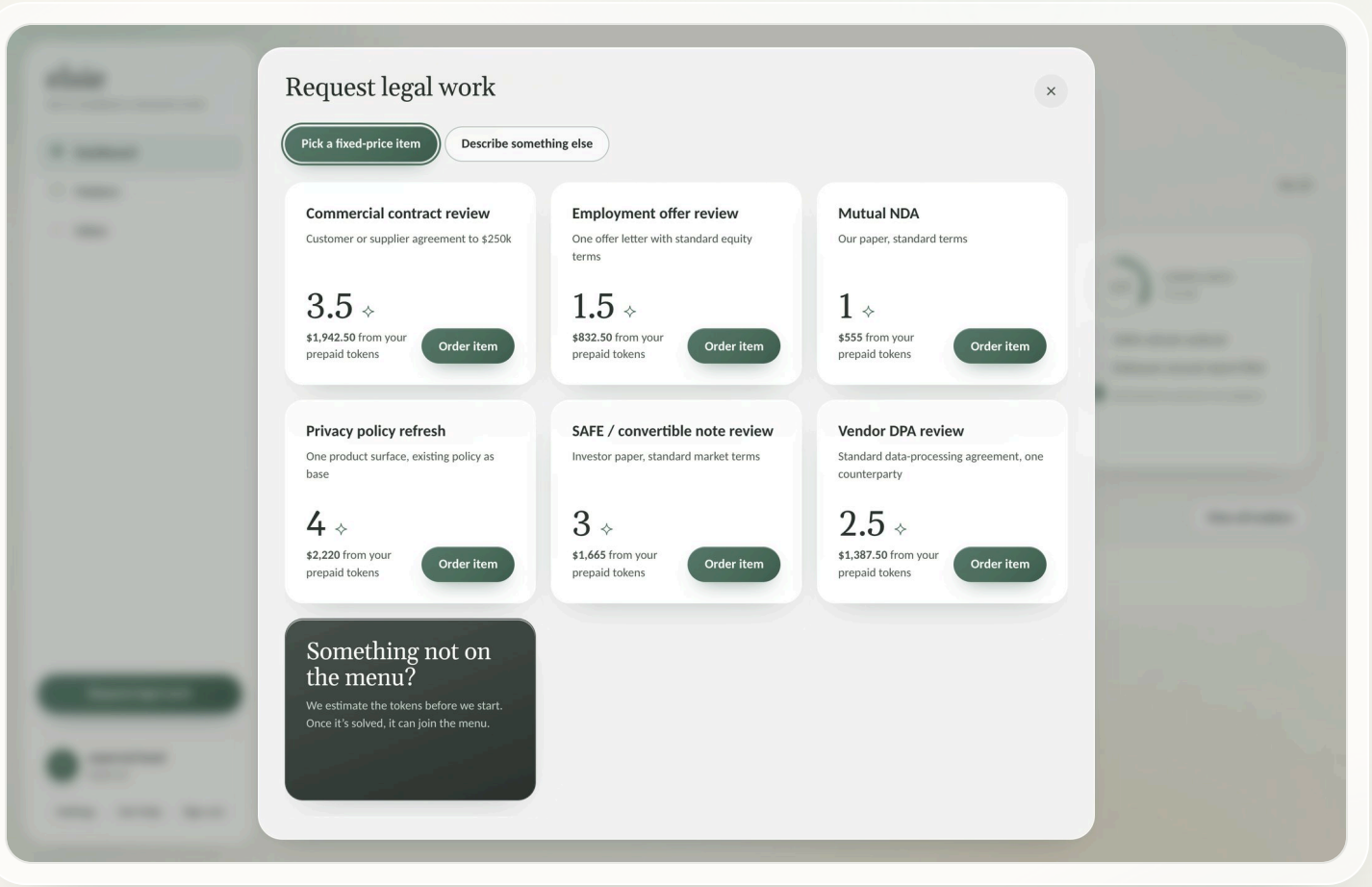
Request legal work

WHAT YOU DO

Choose **Request legal work**. Pick a fixed-price item, or describe something else. Tick **Mark urgent** if it can't wait.

WHY IT HELPS

A menu order opens a matter straight away and starts the clock. Anything else gets an estimate before work starts.



PART 2 · ASK FOR LEGAL HELP

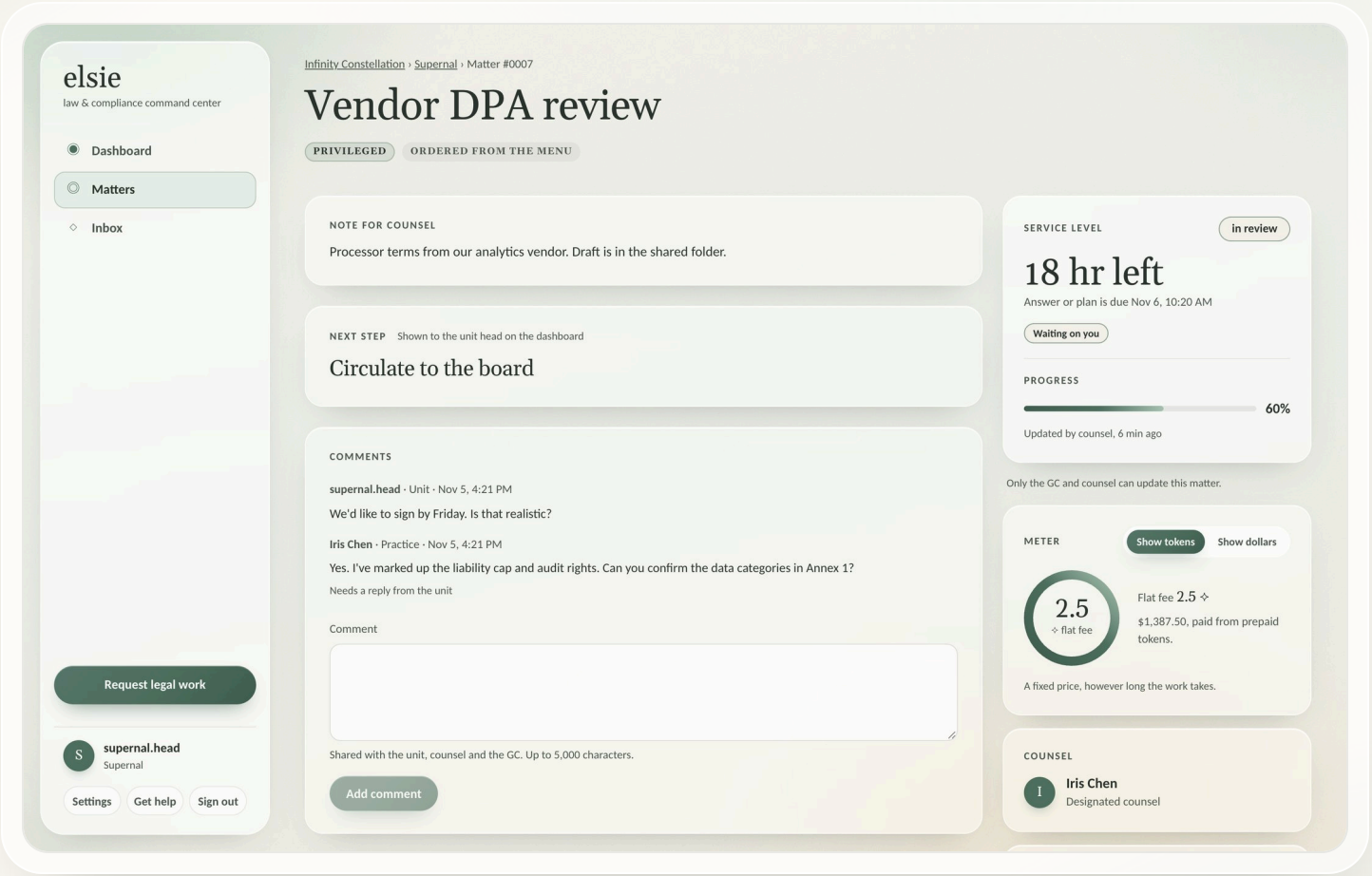
Follow your matter

WHAT YOU DO

The matter page shows the time left, progress, counsel and the comment thread. **Waiting on you** means counsel asked you something.

WHY IT HELPS

Reply on the matter, so the answer stays on the record. While it's still Received, you can cancel it.



PART 2 · ASK FOR LEGAL HELP

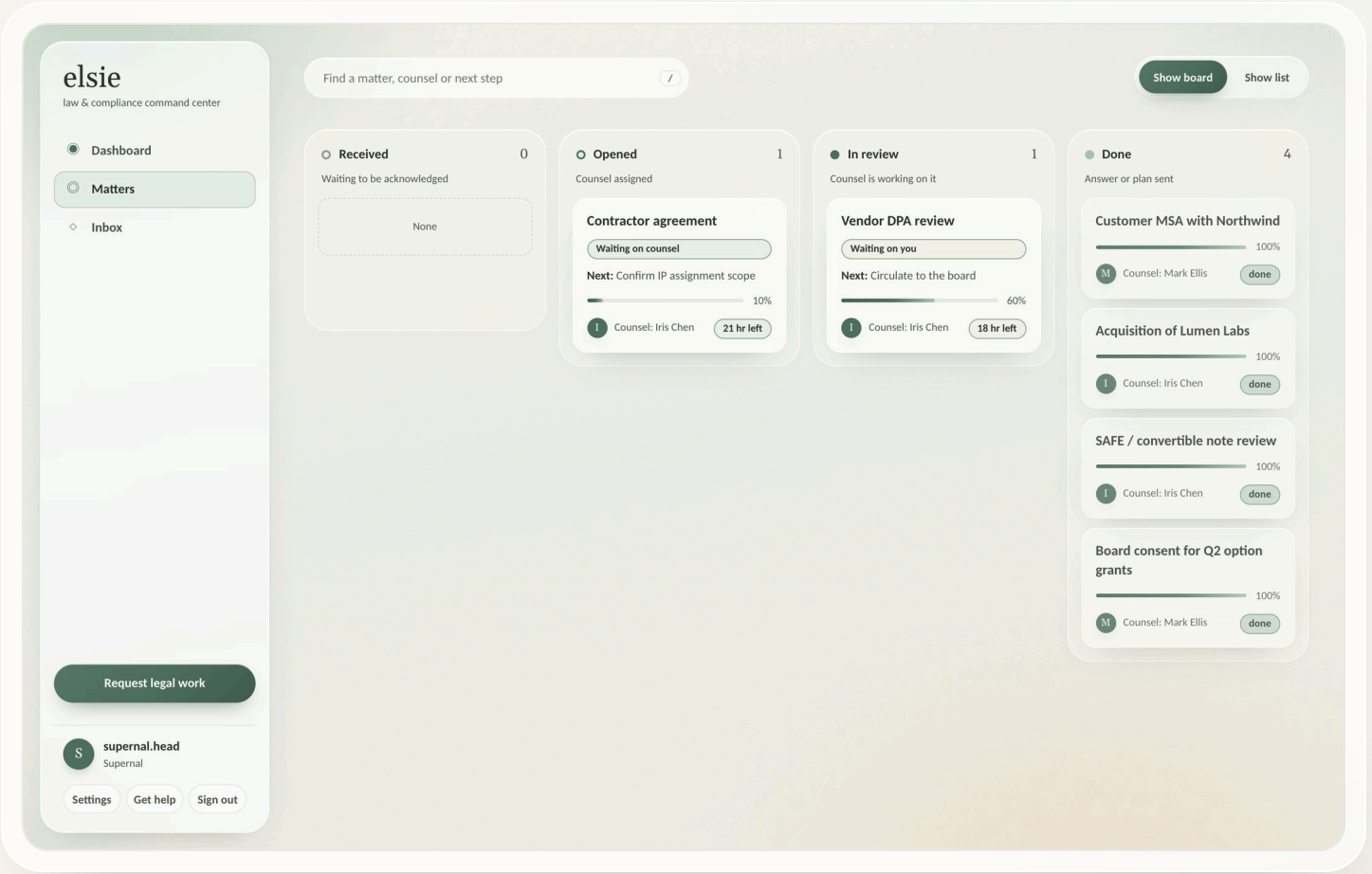
Watch the board

WHAT YOU DO

Open **Matters**. Each lane is a stage: Received, Opened, In review and Done. Choose a card to open its matter.

WHY IT HELPS

Every card shows progress, counsel and time left, and whether the matter is waiting on you or on counsel.



PART 2 · ASK FOR LEGAL HELP

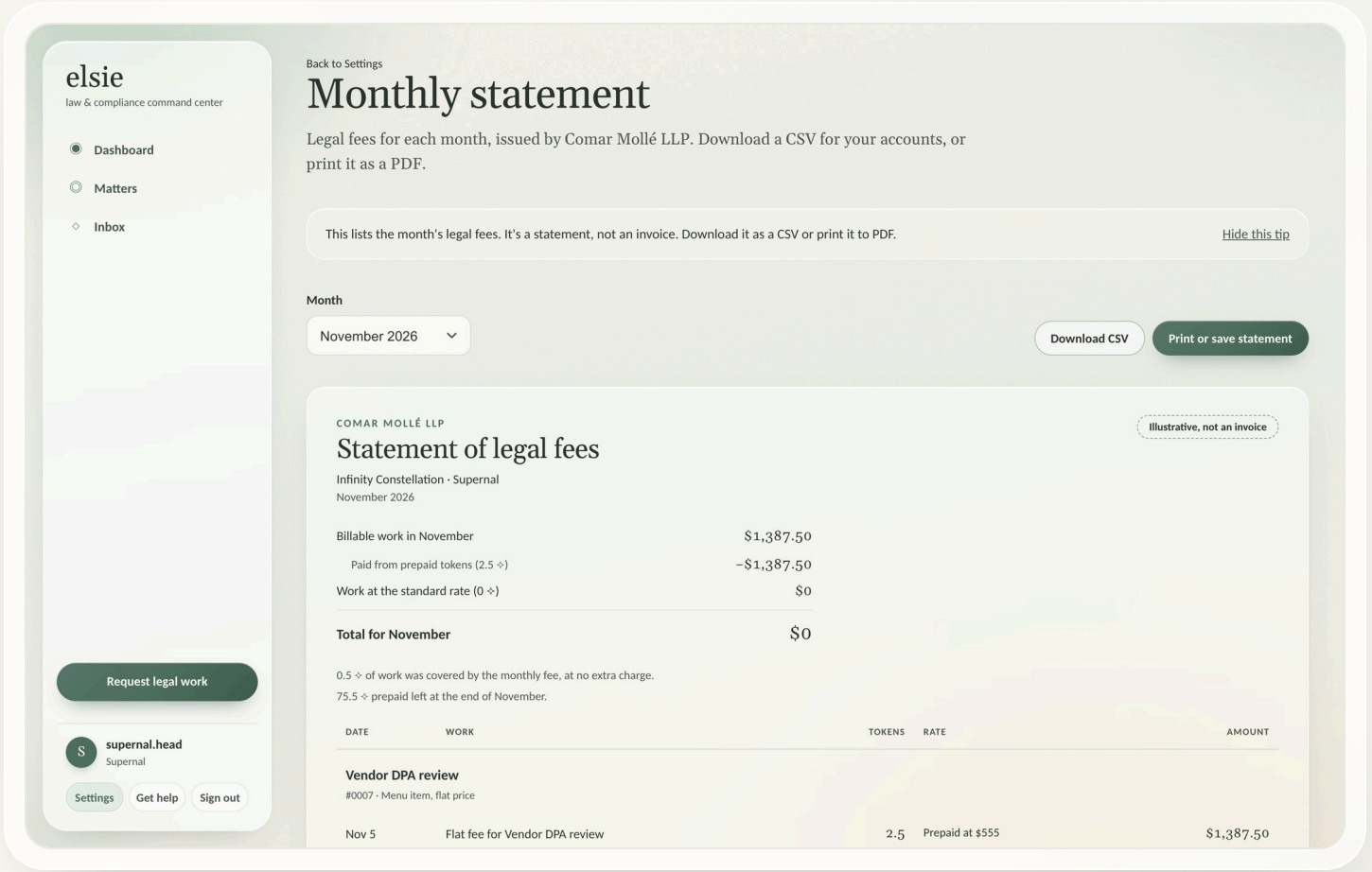
Read the monthly statement

WHAT YOU DO

Open **Settings**, then **Statements**, and pick a month. Download a CSV, or print it to PDF.

WHY IT HELPS

Every line traces back to a matter. A statement isn't an invoice.



03

PART THREE · COUNSEL AND THE GC

Work matters

How counsel and the GC take in email, work matters and keep the unit in the loop.

9 Triage the Inbox
10 Handle an email
11 Work your matters
12 Move a matter forward
13 Keep the unit in the loop

PART 3 · WORK MATTERS

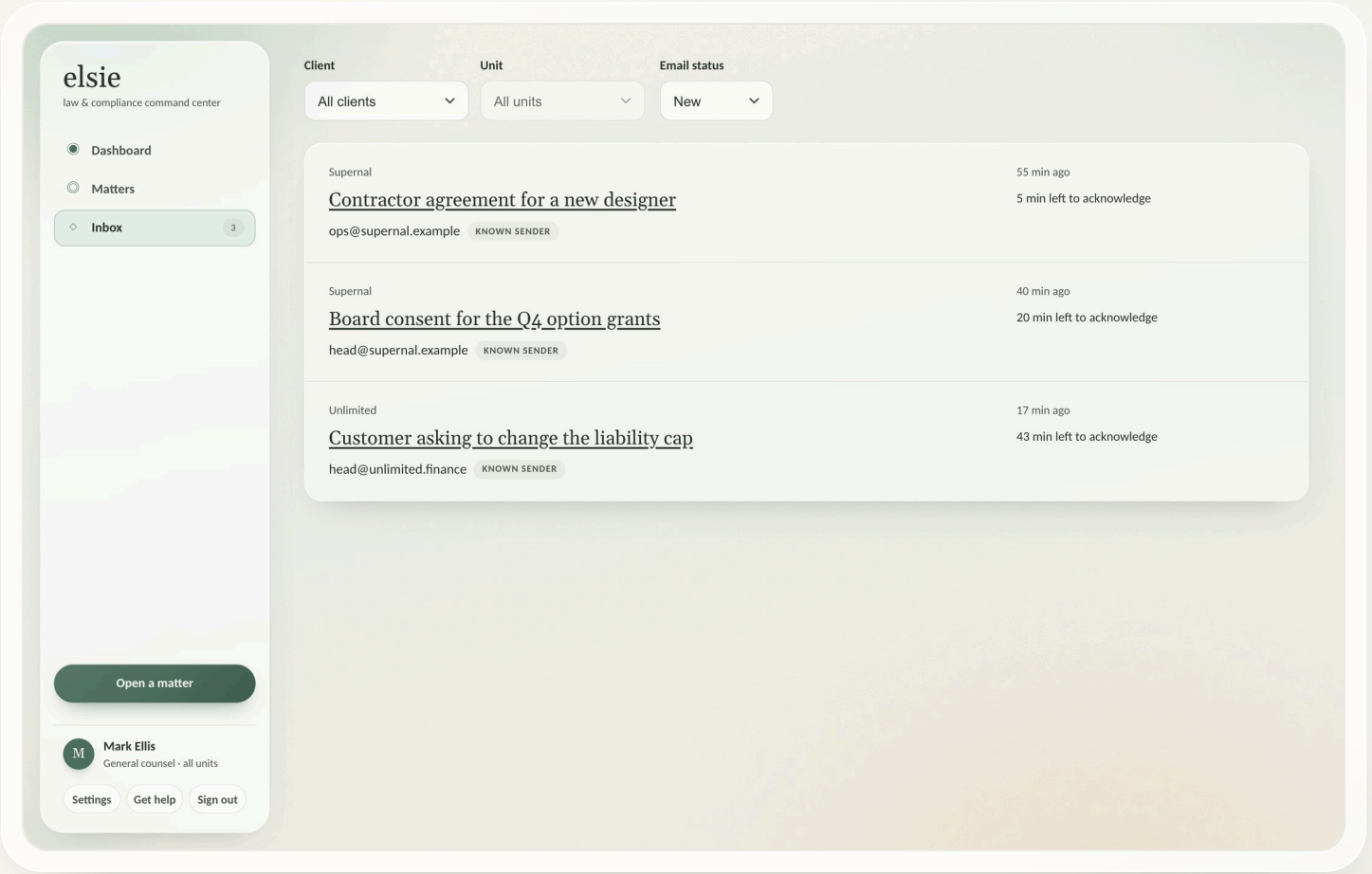
Triage the Inbox

WHAT YOU DO

Open **Inbox**. New email to each unit's legal@ address arrives here, oldest first, with the time left to acknowledge it.

WHY IT HELPS

The clock starts when the email arrives. Elsie checks a sender before it calls them known.



PART 3 · WORK MATTERS

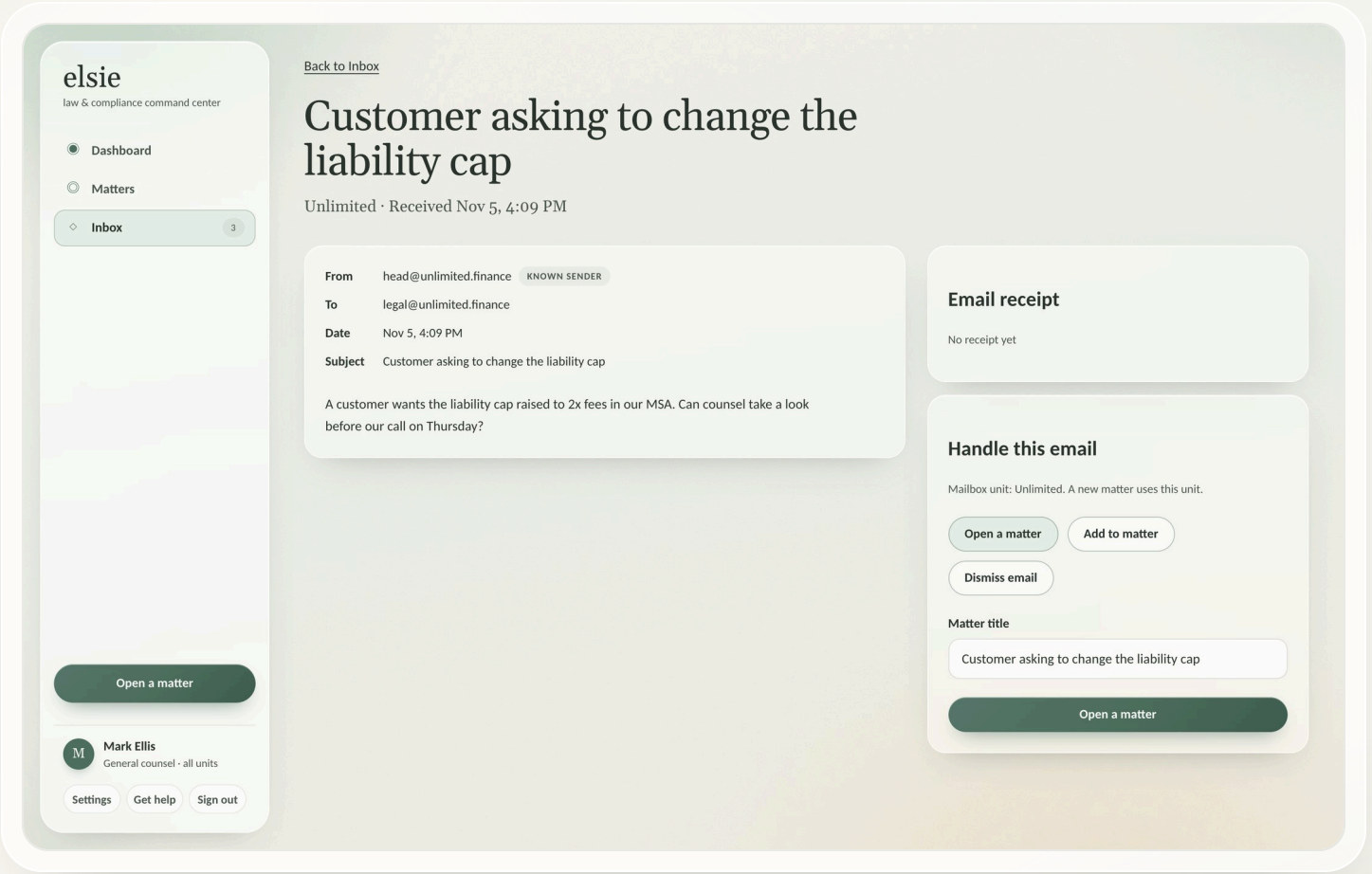
Handle an email

WHAT YOU DO

Open an email. Choose **Open a matter**, **Add to matter**, or **Dismiss email** with a reason the unit can see.

WHY IT HELPS

The sender already has a receipt with the time left. Opening a matter sends a second notice.



PART 3 · WORK MATTERS

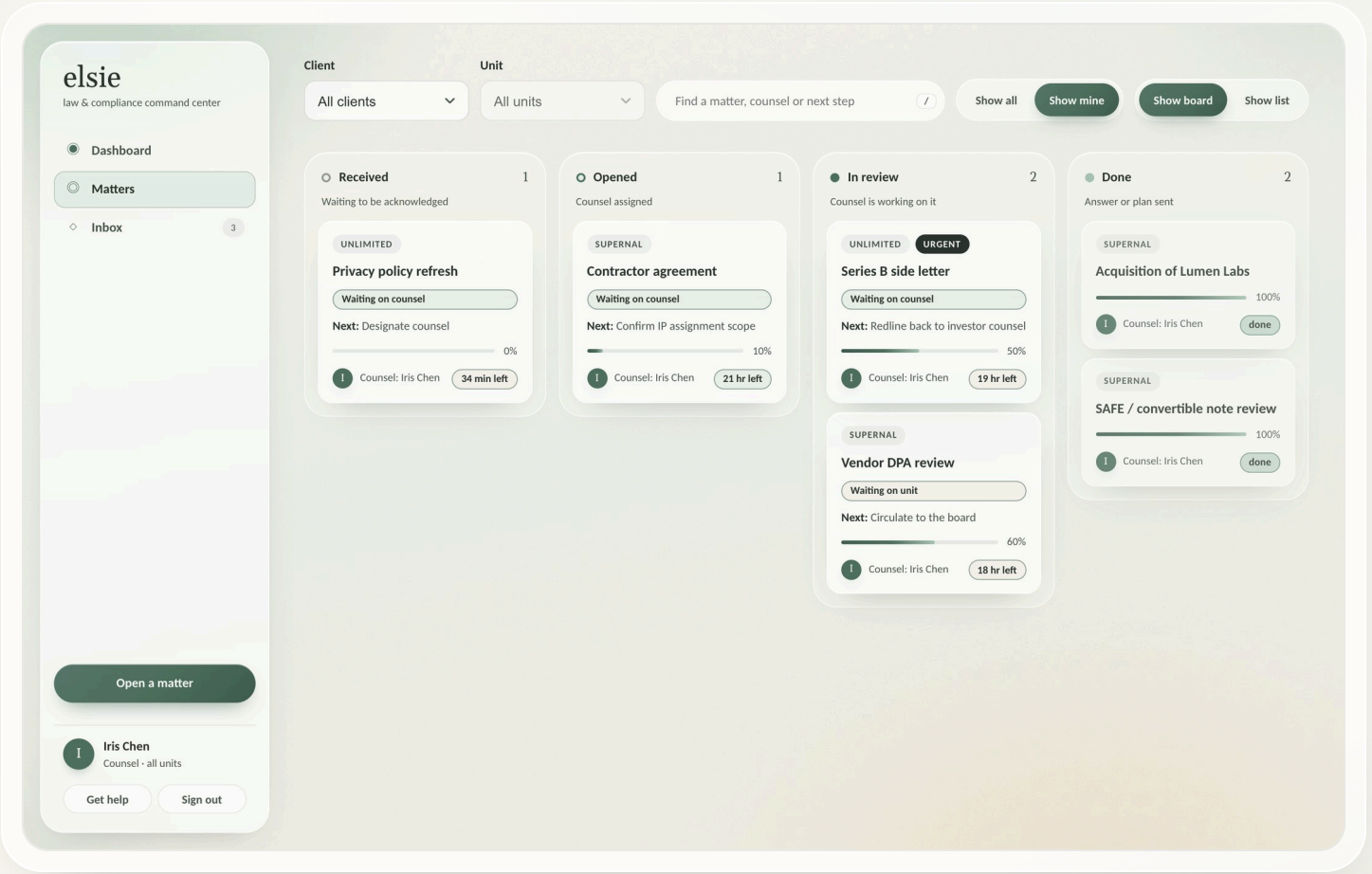
Work your matters

WHAT YOU DO

Open **Matters**. Counsel start with **Show mine** on, so the board shows the matters assigned to you.

WHY IT HELPS

Filter by client and unit, or search by title, counsel or next step.



PART 3 · WORK MATTERS

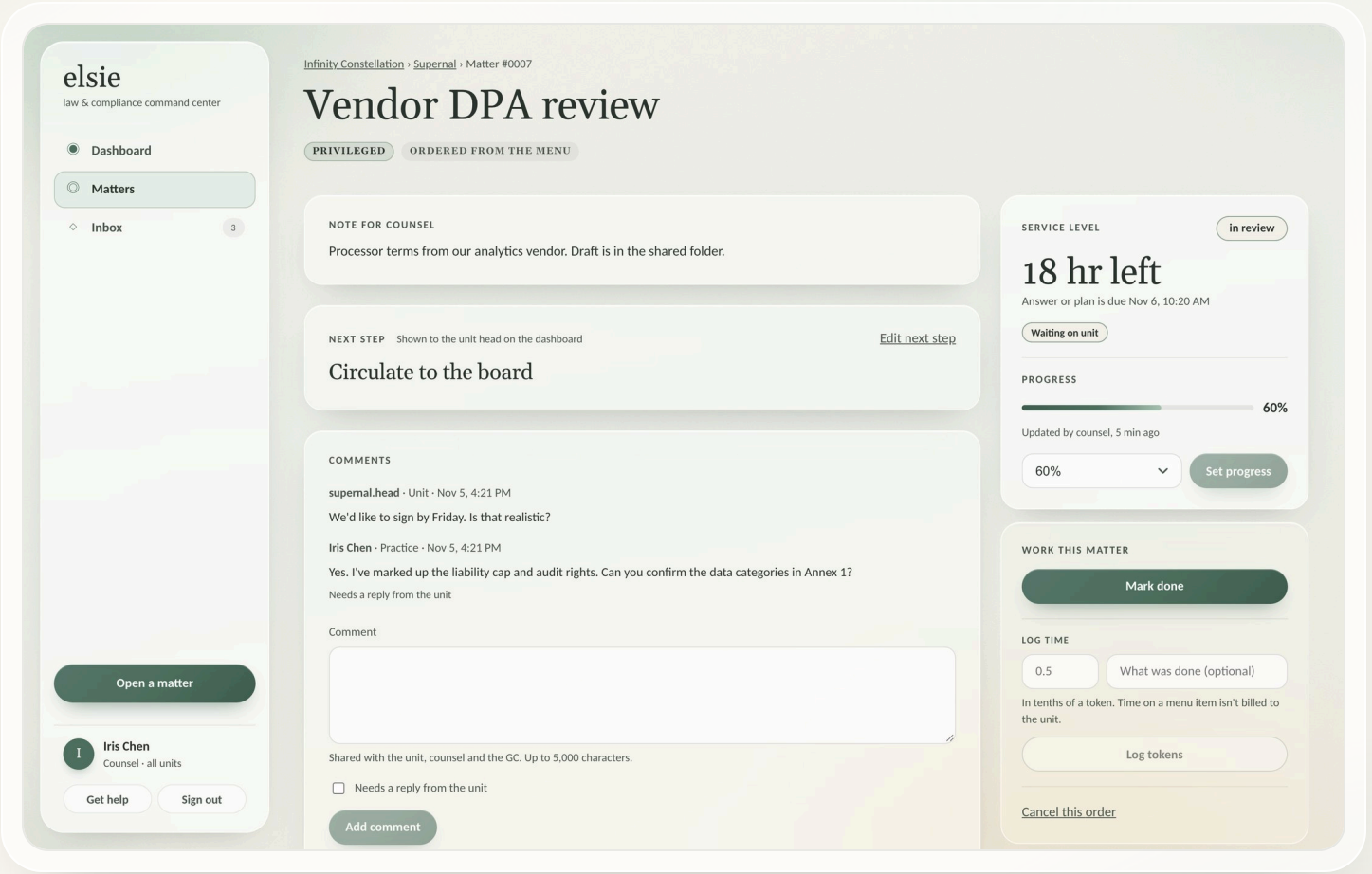
Move a matter forward

WHAT YOU DO

On the matter page, set progress in steps of 10, log time in tokens and choose **Mark done** when the answer or plan has gone out.

WHY IT HELPS

Done asks for a closing note with the answer or plan, and an optional link to the final version.



13 / 17

PART 3 · WORK MATTERS

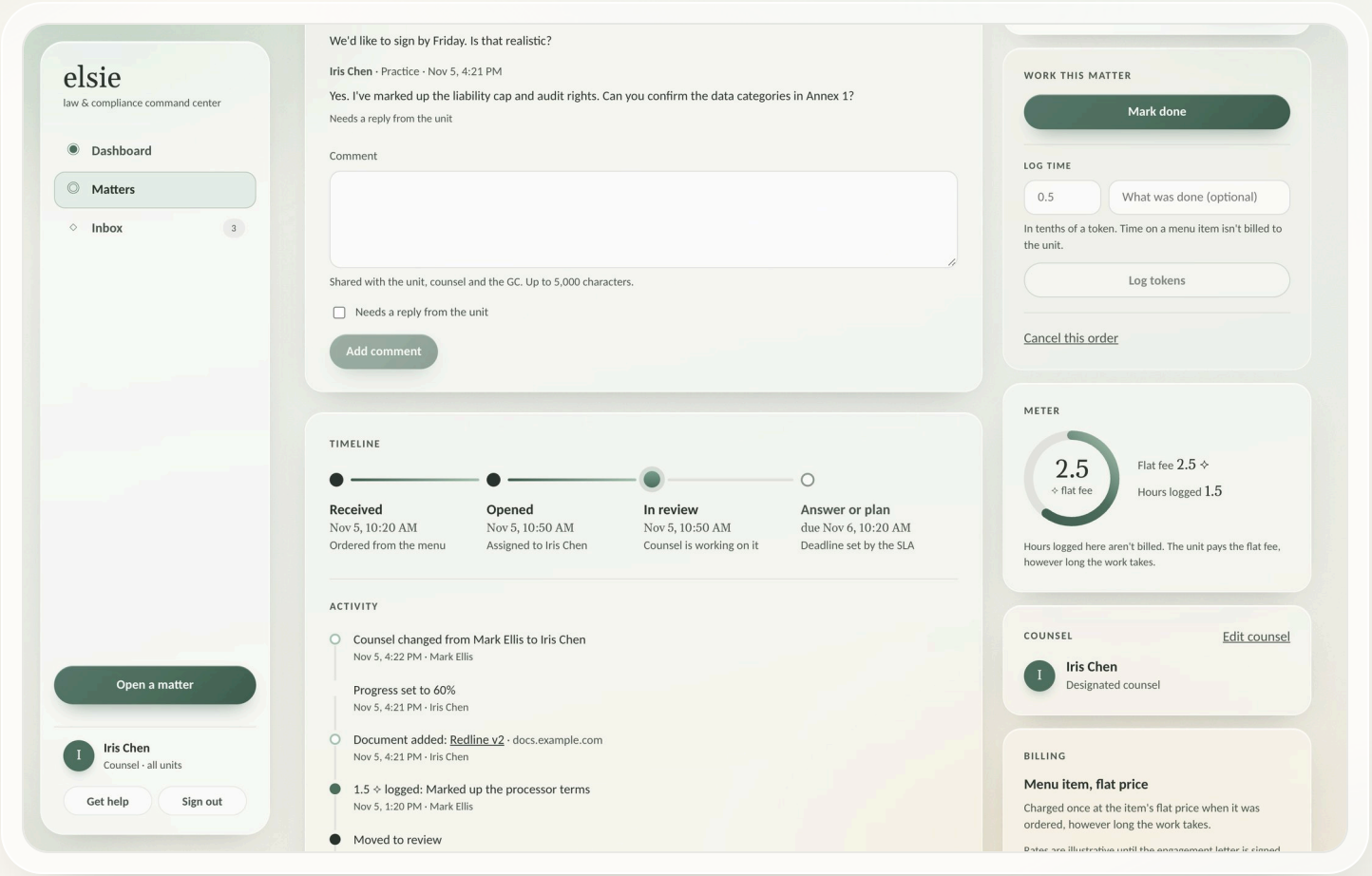
Keep the unit in the loop

WHAT YOU DO

Add a comment. Tick **Needs a reply from the unit** when you need something from them.

WHY IT HELPS

The unit sees **Waiting on you** and gets a notice. Notices carry no matter details.



04

PART FOUR · THE GC

Run the practice

What the GC sees across every client: attention, the client meeting and billing.

14 **See what needs attention**

15 **Prepare the client meeting**

16 **Set billing and read statements**

PART 4 · RUN THE PRACTICE

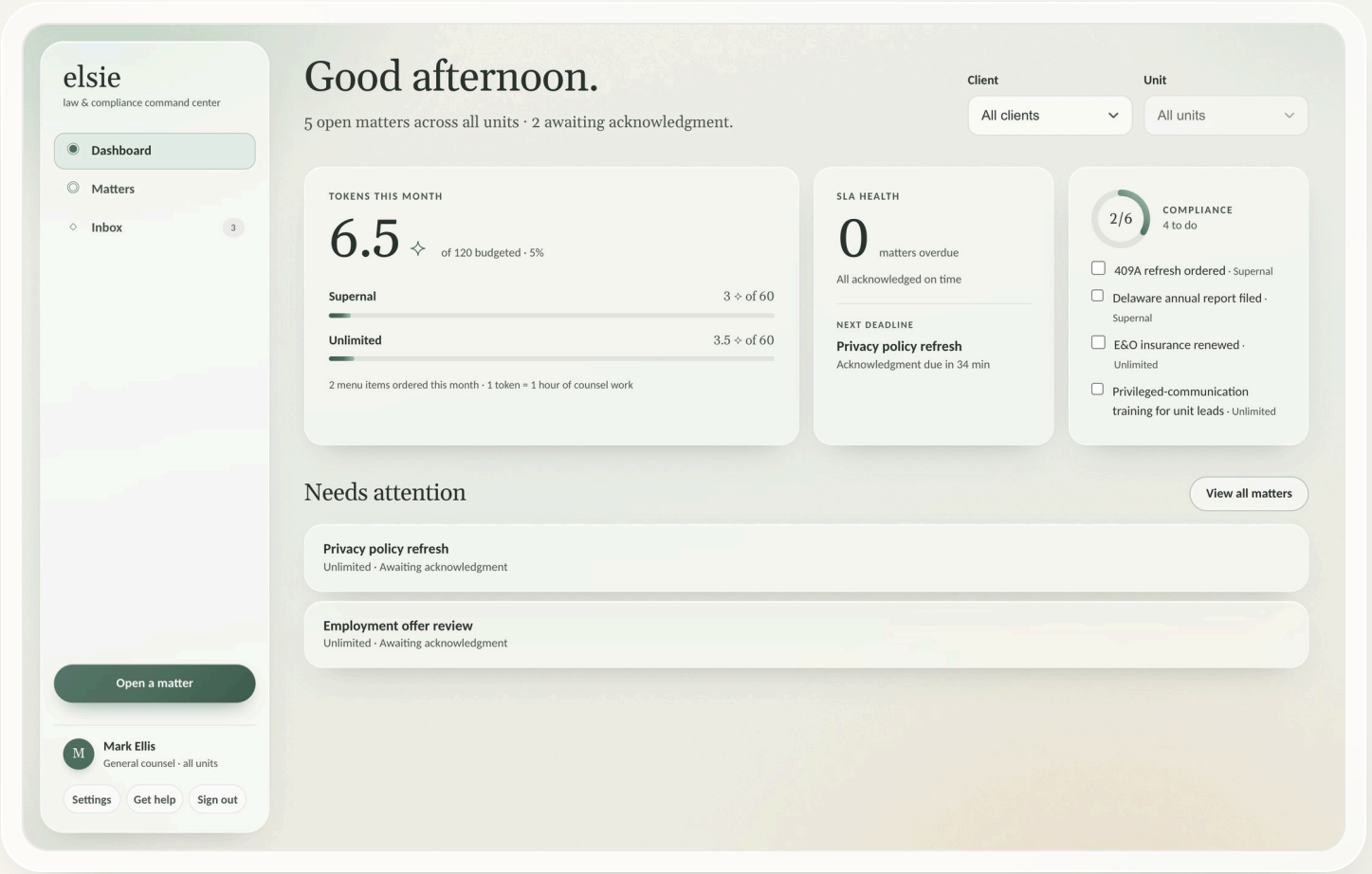
See what needs attention

WHAT YOU DO

The GC's dashboard covers every client, with a short list of matters that are overdue or waiting to be acknowledged.

WHY IT HELPS

Filter by client, then unit, to narrow it down.



PART 4 · RUN THE PRACTICE

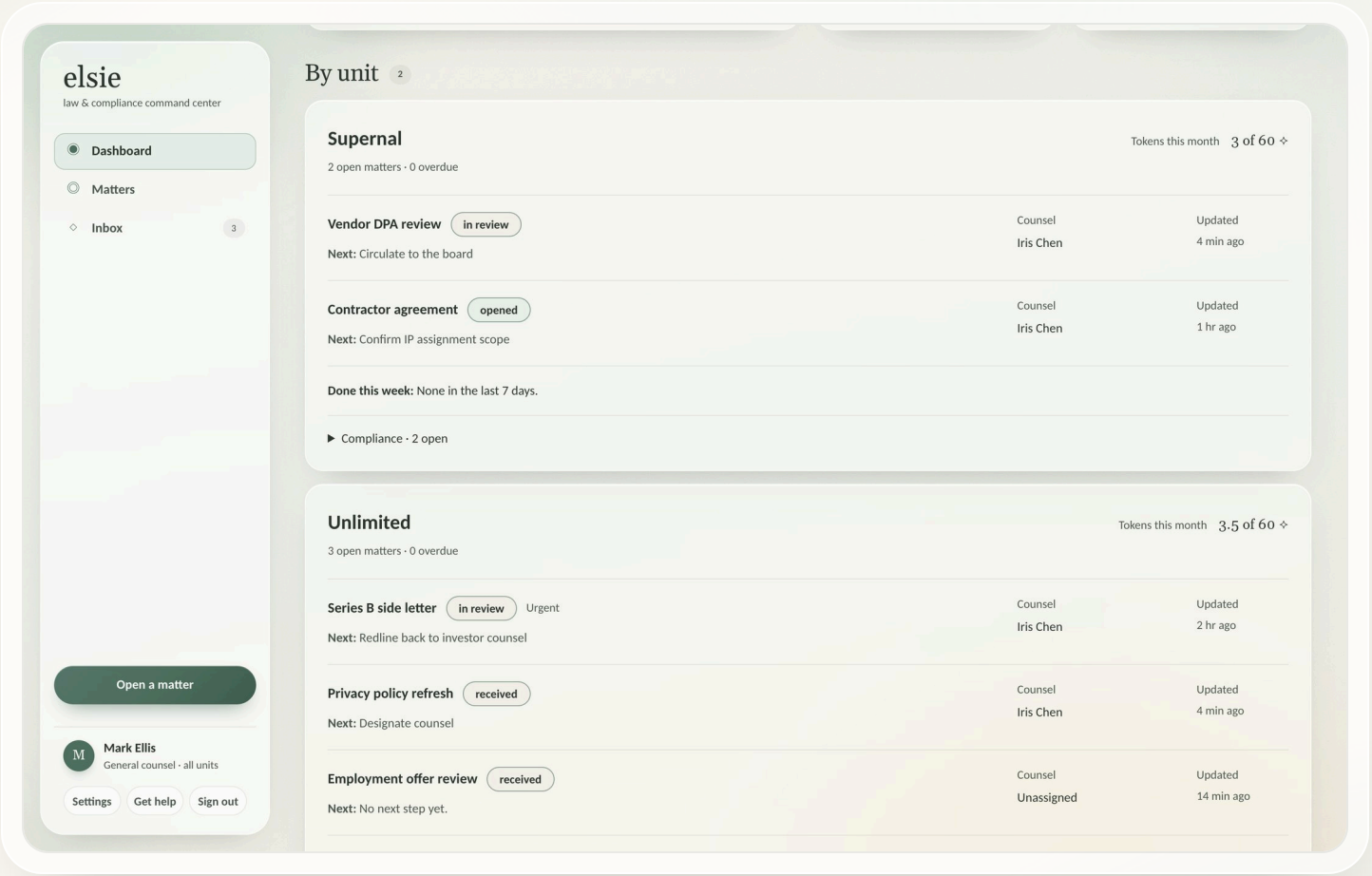
Prepare the client meeting

WHAT YOU DO

Pick a client with all units. A **By unit** agenda appears: open matters, tokens against budget and what was done this week.

WHY IT HELPS

One page for the weekly call, unit by unit.



16 / 17

PART 4 · RUN THE PRACTICE

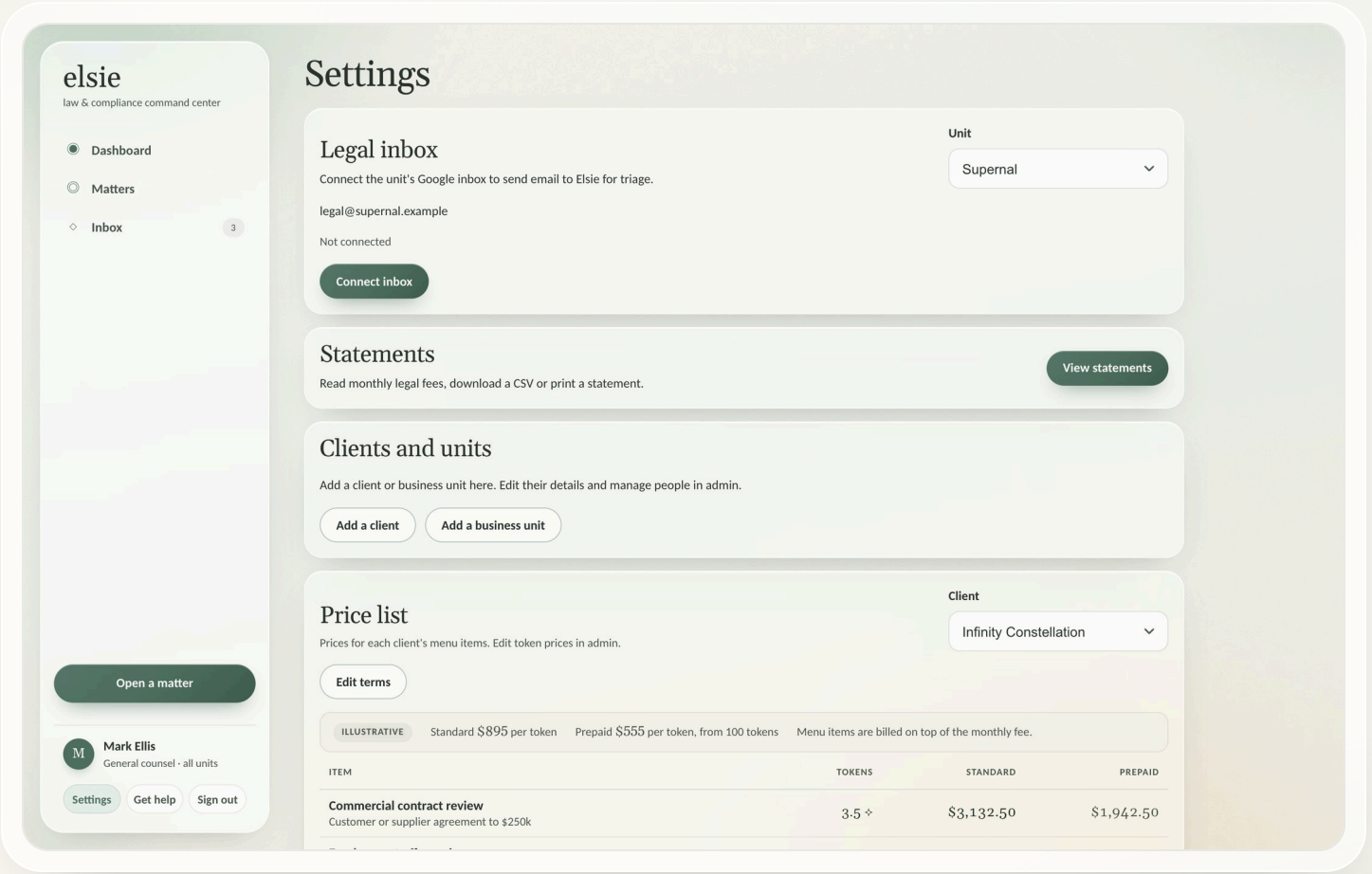
Set billing and read statements

WHAT YOU DO

Open **Settings**. The GC edits billing terms, checks the price list and adds clients and units.

WHY IT HELPS

New rates apply to new work only. Statements keep each closed month's fees. Counsel never see dollars.



05

PART FIVE · EVERYONE

Get help

Where to look when something isn't clear.

17 **Get help any time**

17 / 17

PART 5 · GET HELP

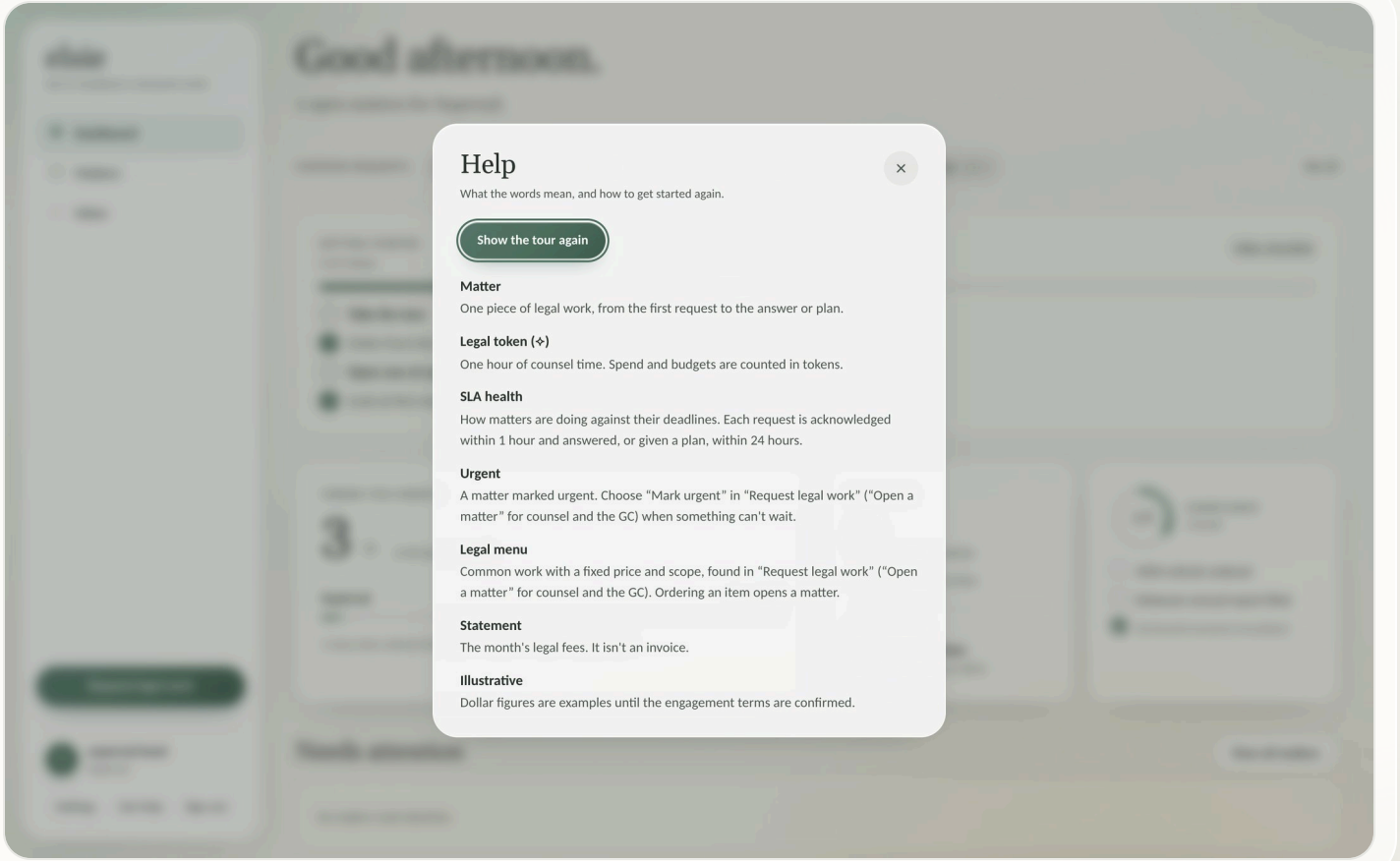
Get help any time

WHAT YOU DO

Choose **Get help** at the foot of the sidebar.

WHY IT HELPS

Replay the tour, or look up a word such as legal token, SLA health or urgent.



GOOD TO KNOW

Built for privileged work.

You see your own unit

Unit heads see only their unit's matters, even from a guessed link. Counsel see every client's matters, in tokens, never dollars.

Sign-in is protected

Ten wrong passwords pause sign-in for 15 minutes. A session ends after 12 hours without activity or when the browser closes.

Figures are examples for now

In the alpha, the matters and dollar figures are examples. Every figure says illustrative until the engagement terms are confirmed.

Your feedback shapes it

Tell us where you hesitated or what you expected to find. Reply to the email that brought you here.

elsie

START HERE

Sign in and take the tour.

It takes about a minute. Then request legal work, or open the Inbox, and watch a matter move across the board.

SIGN IN AT
elsie-psi.vercel.app

YOUR USERNAME
In the email from the GC

NEED HELP
Help, at the foot of the sidebar

VERSION
2.0 · 5 Nov 2026