TAKE MATTERS INTO YOUR OWN HANDS ™

Introduction to *Legal Files*

Legal Files Software, Inc.
Version 9.2
www.legalfiles.com

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Getting Started

Concept

The *Legal Files* program combines the most advanced communications, workflow, collaboration and case management features into a seamless Practice Management system designed to fully integrate and automate your law office or legal department.

Legal Files has all the resources your office needs. More than a single contact manager, docket list or calendar, more than a personal information manager, *Legal Files* is a true business tool for true professionals.

Legal Files works the way you work. It stores an unlimited amount of information for an unlimited number of matters and walks you through every aspect of case development in all of your practice areas. *Legal Files* is logical, intuitive, relevant, and fast.

Legal Files is easy to use. The consistent user interface and common elements make learning *Legal Files* simple and fun. When you finish reading this *Legal Files* training guide, you will have the basic knowledge you need to start using *Legal Files.*

Use this training manual as a quick and easy reference. Welcome to *Legal Files*!

Chapter Lesson

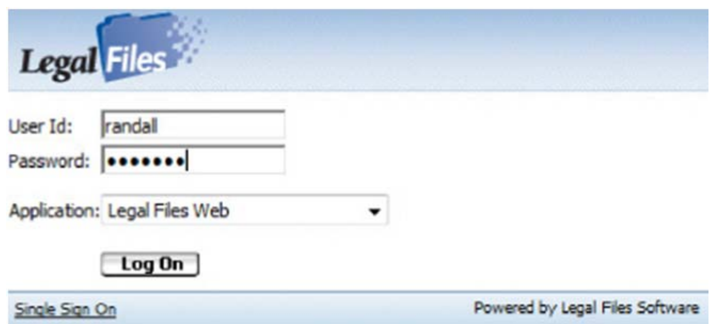
In this lesson you will learn how to log on, adjust your screen size view, establish your Internet settings, and navigate within *Legal Files*. You will also preview the various window types in *Legal Files* and common *Legal Files* functions, establish your User Preference settings, and learn about Heads Up notices.

Logging on to *Legal Files*

You can access the *Legal Files* program from any computer with an Internet connection and the Internet Explorer browser (version 5.5 or above). Or you can use a desktop shortcut supplied by your *Legal Files* system administrator. To log on, you must have a user name and a password. Your system administrator will give you this information and advise you about your office password policy.

1. Open Internet Explorer version 5.5 or above.

In the **Address** field, enter the URL supplied by your system administrator. Typical URLs begin with http:// (or https:// for secure sites). The *Legal Files* login window is displayed.



Enter your User ID in the **User ID** field, and your password in the **Password** field.

Contact your system administrator to receive your User ID and password.

2. Click on the **Log On** button. The *Legal Files* Desktop window is displayed.

By default, the interior window displays the My Files view, though this view will vary according to your My Start Page selection in Preferences. See "Establishing Preference Settings" on page 19 for information about changing your My Start Page setting and other preferences.

Establishing Your Internet Page View Settings

In order to ensure that everyone logged into *Legal Files* sees the most recent data, *Legal Files* users should change their Internet browser settings to check for newer versions of stored web pages every time you visit the page.

To Change Your Settings for Internet Explorer

1. From the Internet Explorer **Tools** menu, select the **Internet Options** menu choice.

2. Click on the **Settings** button in the Temporary Internet Files (IE 6.0) or Browsing History (IE 7.0 or higher) section of the window. The Settings window is displayed.

3. Select the **Every Visit to the Page** (IE 6.0) or **Every time I visit the web page** (IE 7.0 or higher) radio button to instruct your browser to check for newer versions of stored pages every time you visit the page.

4. Click **OK** to save your settings and close the Settings window.

5. Click **OK** to save your settings and close the Internet Options window.

6. Close and re-pen Internet Explorer before logging back into *Legal Files.*

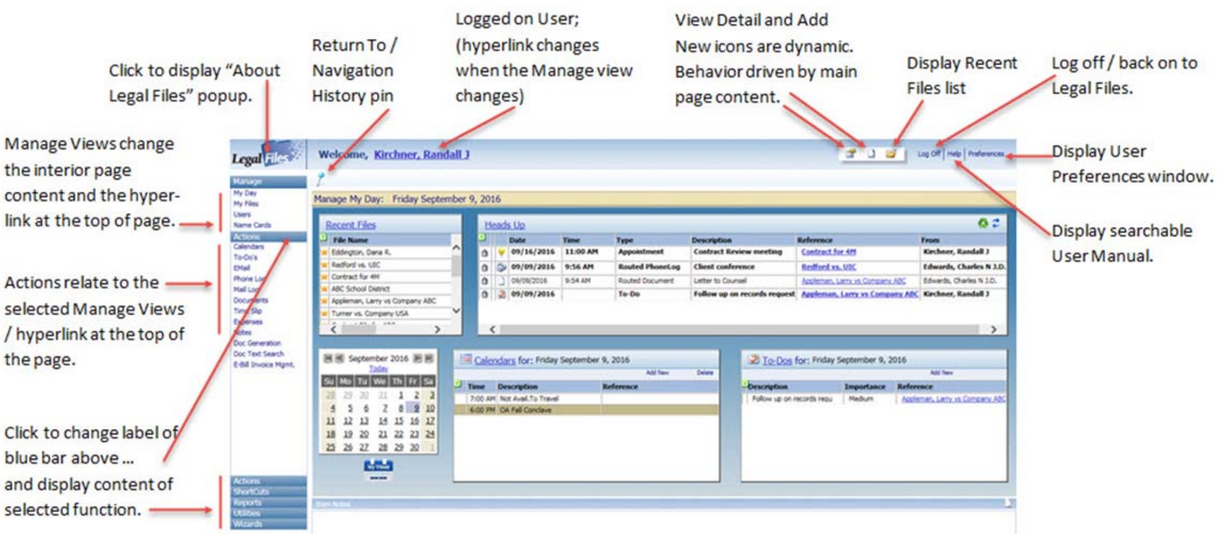
Navigating *Legal Files*

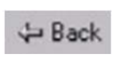
Everything you do in the *Legal Files* program takes place within the *Legal Files* main window. This section introduces you to the features of the *Legal Files* main window. Information about using these features is discussed in the subsequent chapters of this training guide.

The hyperlinks across the top of the main window generally, but not always, display pop-up windows. For example, click on **Help** to display the *Legal Files* Help topics or **Preferences** to display the Preferences pop-up window.

The hyperlinks along the left side of the window generally, but not always, change the display of the interior window. For example, the Manage My Day, My Files, Users, Name Cards, Action Items, Reports, and Utilities links generally replace the currently displayed view with another, whereas the Shortcuts links generally display a separate Internet window.

The following screen shot is an example of the window that displays upon logging onto *Legal Files*. In this example, the Manage My Day view displays upon logging in based on the Preference settings.



NOTE: Do not use the  ***Back** button on the Internet Explorer's toolbar to return to a previous view within Legal Files. Instead, use the top- and left-side hyperlinks within Legal Files to move through the Legal Files views.*

Top-Side Hyperlinks

By default, the top-center hyperlink displays **Welcome, user name,** where user name is the name of the logged-on user. This hyperlink changes according to the selected Manage view, displaying **My File: name, User: name**, or **Name Card: name** accordingly. In each of these instances, the name displayed represents the first name in the file, user, or Name Card list, until you select another name from the list.

View Detail will display the detail window for the file that is currently in 'focus' of the *Legal Files* window. If the focus is a file then the file's detail window will display. If it is a user or Name Card, then the highlighted Name Card detail window will display.

Add New opens the window to add a new file or Name Card.

Recent Files displays the list of files that have been most recently accessed.

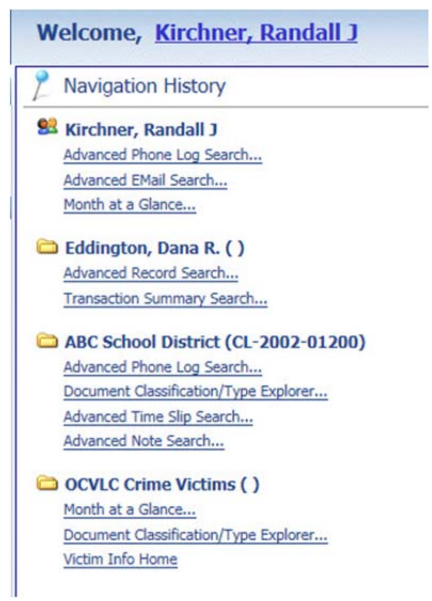
The **Log Off** hyperlink logs you off the *Legal Files* program and returns you to the Log On window, where you can exit *Legal Files* or log back on.

The **Help** hyperlink displays the online Help topics for guidance in using *Legal Files*.

The **Preferences** hyperlink displays the User Preferences window for the logged-on user. This window contains the options the user sets that determine how their *Legal Files* window looks and operates. For example, you can specify your starting window view, calendar view, and My Day Index options.

The **Return To / Navigation History** pin  allows users to quickly return to pages recently visited. By clicking on the pin icon appearing below the blue navigation hyperlink at the top of all pages, users can now browse their navigation history, which:

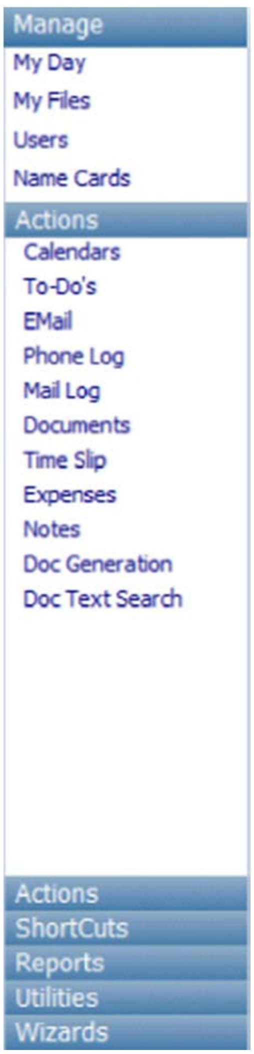
- Lists four "groups" – The logged-in user and up to three files
- Includes up to 9 pages/items within each "group"
- Resets to "blank" when a user logs out of Legal Files
- Shows only those pages loaded in the main application frame – the area under Advanced Search filters. Excluded pages include pop-up windows (individual To Dos, Name Cards, etc.) as well as Shortcuts, Reports, Utilities and Wizards



Left-Side Hyperlinks

The left-side hyperlinks primarily change the interior views of *Legal Files*, allowing you to manage different aspects of the program. The **Manage** hyperlinks are always visible; use them to manage your day, files, users, or Name Cards. The **Actions, ShortCuts, Reports, Utilities** and **Wizards** menus become visible according to which heading you select.

The hyperlinks within these headings may vary from user to user according to the settings established by your system administrator. A brief explanation of these views follows. They will be discussed in full in later chapters.



Manage

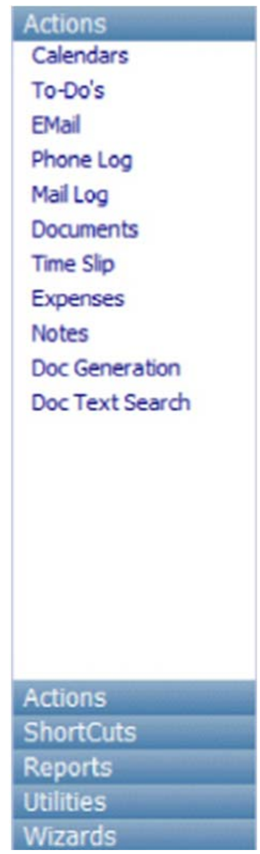
The Manage view displayed upon logging on to *Legal Files* is determined by a setting in Preferences. A brief explanation of these views (My Day, My Files, Users, and Name Cards) follows:

- **My Day**. Click on this hyperlink to manage many aspects of your day from one view. From this view, you can access your recently viewed files, Heads Up notices, To-Do's, calendar items, and calendar dates. This view defaults to today's date, but you can use the calendar to view and manage other dates.
- **My Files**. Click on this hyperlink to view a list of files to which you have access. Use the scroll bar on the right to move the list up and down. When in this view, the action items along the left-side of the *Legal Files* window correspond to the selected file. From this file list:
- Click on the **File Home** icon (or double-click the file's record) to view the file's navigation menu, from which you will manage most aspects of the file.
- Click on the **File Detail** icon to display the file's detail window (i.e., file setup), which contains the fields and settings that determine what appears on the file's home view. The detail window can also be accessed from the File Home view. Regardless how the window is opened, it always displays as a pop-up window. Click on that detail window's Save or Cancel buttons to close the window and return to your previous view.
- **Users.** Click on this hyperlink to see a list of every *Legal Files* user in the database. The action items along the left-side of the *Legal Files* window correspond to the selected user in this view.

From the user list:

- Click on the **Name Card Home** icon to view the user's Name Card data.

- Click on the **Name Card Detail** icon (or double-click the Name Card record) to display the user's Name Card detail window, which contains the fields and settings that determines what appears on the user's Name Card. The detail window can also be displayed from the user's home view. Regardless how the window is opened, it always displays as a pop-up window. Click on the detail window's Save or Cancel buttons to close the window and return to your previous view.



- **Name Cards**. Click on this hyperlink to see a list of every person or company Name Card in the *Legal Files* database. Notice that Action items are unavailable and cannot be related to Name Cards. From the Name Card list:
- Click on the **Name Card Home** icon to display the Name Card data for the selected person or company.
- Click on the Na**me Card Detail** icon (or double-click the Name Card record) to display the Name Card details for the selected person or company, which contains the fields and settings that determines what appears on the Name Card. From the detail window, you can add or modify data as needed. The detail window can also be displayed from the Name Card's home view. Regardless how the window is opened, it always displays as a pop-up window. Click on the detail window's **Save** or **Cancel** buttons to close the window and return to your previous view.

Action Items

Click on this header to manage the action items of your selected Manage view (with the exception of the Name Cards view). In the My Day view, the action items relate to the logged-in user; in the My Files view, the items relate to a selected file; and in the user's view, the items relate to the selected user. Action items are not available in the Name Cards view.

The name listed in the **My File, Welcome,** or **User hyperlink** at the top-center of the *Legal Files* window indicates the currently active record; clicking on any item under the Actions heading displays items related to that record.

By default, the items listed under the Actions heading display as hyperlinks. Click again on the Actions heading near the top of the list to change the hyperlinks to icons. Click again to change the icons back to hyperlinks. Whether displayed as hyperlinks or icons, they function the same way. For example, click on the **Phone Log** hyperlink or icon to display the list of phone logs corresponding to your selected Manage view.

Shortcuts

Click on the ShortCuts heading to display any existing web links, allowing you to access your favorite web sites from within *Legal Files*. Click on the ShortCuts heading again to create a new web-link.

Reports

Click on the Reports heading to access any Crystal Reports or *Legal Files* reports you use in conjunction with *Legal Files*. Additionally, use the Report Status hyperlink to view the status of reports and generated documents.

Utilities

This section contains hyperlinks to any additional *Legal Files* functions you installed, such as **Administration, Expense Quick Add and Batch Time Entry.** The *Legal Files* system administrator will see the Administration hyperlink, which is used to manage the *Legal Files*' program and network settings.

Wizards

This section contains hyperlinks to any additional *Legal Files* functions, such as **Conflict Check, Doc Text Searching, Eligibility, File Copy, Open File, File Related, User Assignment, Multi-File Doc, Multi-File Mail Log, Multi-File Note, Recurring Calendar**, **To Do** and **Work Flow**. Access to these features is controlled by function-level security settings.

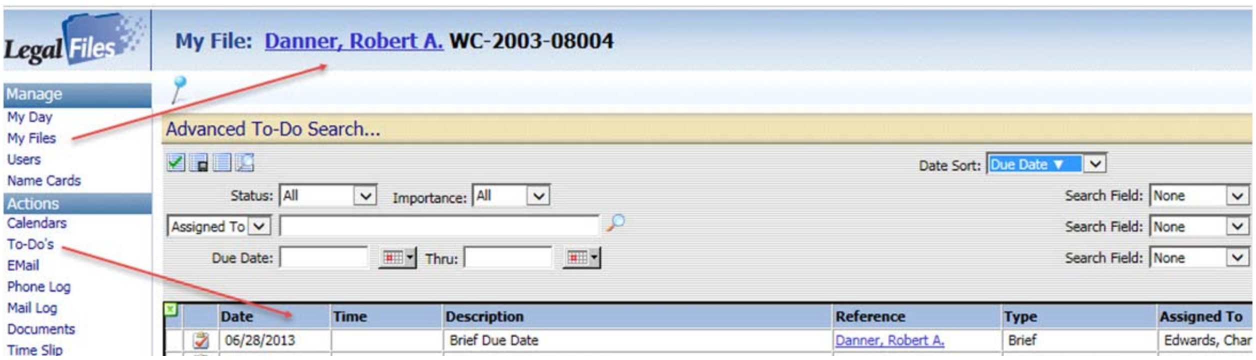
Legal Files Logo

Click on the *Legal Files* logo in the upper-left corner to view data about the program, such as the version number and copyright information.

Interior Window

The interior window displays the items corresponding to your selected view: My Day, My Files, Users, or Name Cards. Your user preference settings determine which view displays upon logging in, though you can also change your view by clicking on one of the hyperlinks to the left of the window.

Getting Started



The interior window above is displaying the To-Do's corresponding to the file selected in the My Files view.

Regardless of your view, *Legal Files* follows common features for your convenience. A red exclamation indicates a priority item. Other columns (such as Date, Time, Reference, and User) give you at-a-glance views of each listed item. You can view additional details and/or update the data by clicking on an icon (or double-click the record) to display the item's detail window. Click on a hyperlink within the Reference column to launch to that file.

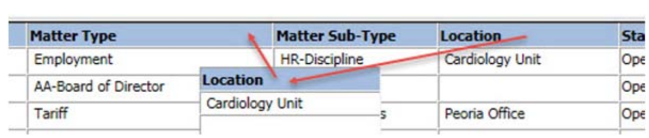
The items listed in the interior window change according to your hyperlink selections (e.g., list of files, list of users, calendar items, documents, etc.) but the way in which you use the lists remain consistent. This common work environment simplifies program operation and navigation.

Exporting Search Results to Excel

The first column of most interior windows will have a small Microsoft Excel icon in the blue header bar . Clicking this icon will quickly export the rows displayed in that window below into Excel, from which a user may create a report with all the formatting power of Excel.

Re-Ordering Columns

On any Advanced Search results window (i.e., My Files, Documents Search View, etc.), users can re-order the columns. Simply click on a column heading and move it to its preferred location. The new column order will be retained for that user on that machine until changed.



Adjusting the Display to Your Screen Size

If you cannot see the Search button at the top of the *Legal Files* interior window, you can do the following to help the display adjust itself to your screen size.

1. Click on the **Restore Down** button, which is the middle button in the upper right corner of the Internet Explorer window.

2. Click on that same button again, which now is labeled **Maximize.**

The display should now be adjusted to fit your screen size, although you may need to repeat these steps periodically upon logging on.

Establishing Preference Settings

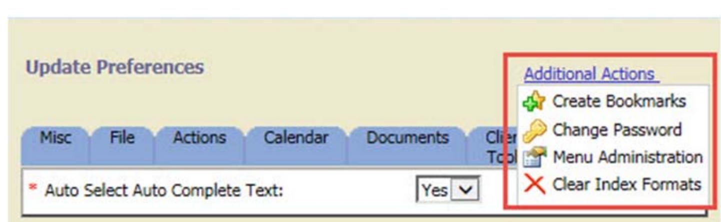
Use the Preferences Detail window to determine how your *Legal Files* application looks and operates. For example, you can determine which view displays upon logging on, your default document view; to change the look of your Manage My Day; the maximum number of records that can be returned from a request; how to display a note preview pane at the bottom of the *Legal Files* window, and more.

A red asterisk next to a field name indicates that you must log off and on again for the change to take effect.

To specify preferences:

1. Click on the **Preferences** hyperlink near the to-right of the *Legal Files* window. The User Preferences window is displayed for the logged-on user.
2. Specify settings for the following fields as needed:

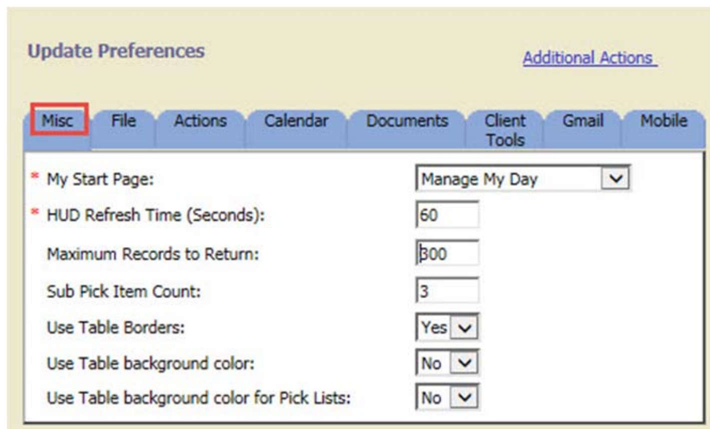
On the "Additional Actions" tab:



Create Bookmarks: Click on this to add the *Legal Files* and/or *Legal Files* eBill log on windows to the Favorites list of Internet Explorer, allowing you to log on to either or both applications from the Favorites menu.

Change Password: Enter in old password, a new password and confirm the new password.

On the "Misc" tab:



My Start Page: Use this drop-down list to select Manage My Day, My Files List, or Heads Up List as the view that displays each time you log on to *Legal Files*. **Recommended Setting:** *Manage My Day*.

HUD Refresh Time (Seconds): Enter the number that corresponds to how often you want Heads Up (HUD) to poll the system for new messages. By default, it polls the system every sixty seconds.

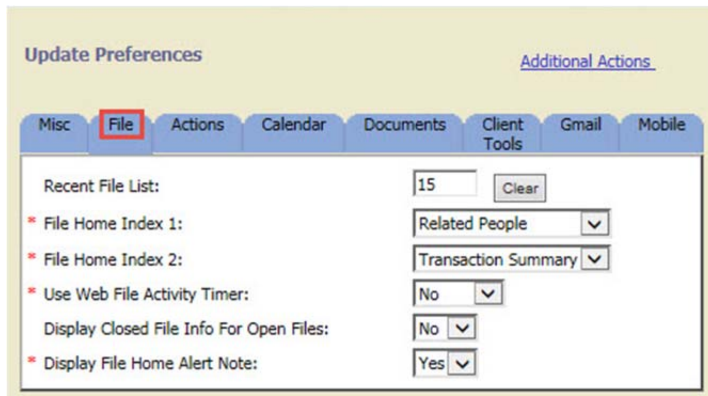
Maximum Records to Return: Use this field to limit the maximum number of records that can be returned by a polling request. Some windows only have the ability to sort if fewer than 400 items are returned.

Sub Pick Item Count: This setting applies to the Eligibility utility program, determining the number of pick entries that can be specified at once when using the New hyperlink on the Eligibility Detail window to enter data about Income, Factors, Assets, Benefits, Funding or Demographics. This setting defaults to 3.

Use Table Borders: Select *Yes* or *No* from the drop-down list to determine whether the tables containing the *Legal Files* data will show borders around the columns, rows, and tables.

Use Table background color: Select *Yes* or *No* from the drop-down list to determine whether the table containing the *Legal Files* data will have a white or light blue background. Regardless of this setting, the row color changes as you float your mouse over it, helping you to distinguish one row of data from another.

Use Table background color for pick lists: The settings for this field work as the previous one, except the background color pertains to the pick list tables.



On the "File" tab:

Recent File List: Indicates the max number of files (up to 99) to display in the Recent Files list.

Click **Clear** to clear the Recent Files list of its current contents.

File Home Index 1: Choose from the list (Assigned Users, File History, Related People, Related Files, or Transaction Summary) for an additional data window that will display on the File Home window.

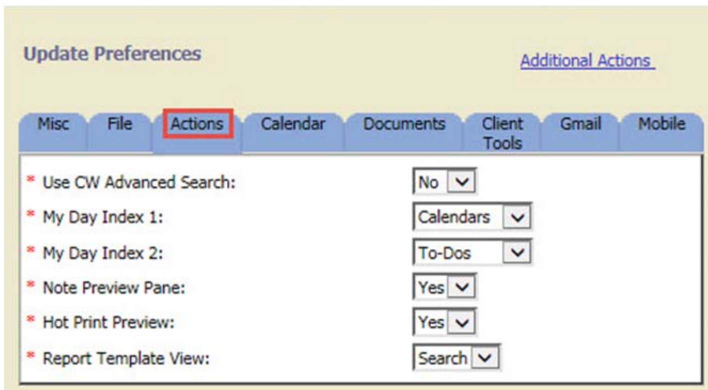
File Home Index 2: Choose from the list (Assigned Users, File History, Related People, Related Files, or Transaction Summary) for a second additional data window that will display on the File Home window.

Use Web File Activity Timer: Select Yes or No from the drop-down list to determine whether you want to automatically track the time you spend in a file. When set to Yes, the **File Activity Timer** icon is displayed below the **Preferences** hyperlink of the *Legal Files* window, which automatically records your file time whenever you open and close a file, and provides a short cut for creating a time slip from the automatically recorded time. When set to Prompt, leaving a file will present you with the option to create a time slip; the subsequent time slip automatically references the file and enters the time you spent in the file. When set to No, you can create time slips from action item detail windows of a file, but you must track your own time.

Display Closed File Info for Open Files: Allows the **Closed File Information** box on the **File Detail** window to remain displayed and editable on open files**.**

Display File Home Alert Note: Set to **Yes** to display **Alert Notes** in a pop-up window on the File Home Page. If set to No, clicking the blinking ****Alert**** link shows only the content of a note, rather than the note detail window.

On the "Actions" tab:



Use CW Advanced Search: Select **Yes** or **No** to determine whether to display the Advanced Search window at the top of specific Custom Window list views. **Recommended Setting:** *Yes*.

NOTE: Legal Files strongly recommends setting the ***Use CW Advanced Search*** *option to Yes and establishing and using a default search criteria setting. See* "Using Custom Windows" *on page 60* *for more information on Custom Window Advanced Searches.*

My Day Index 1: Choose from the list (Calendars, To-Dos, Email, Phone Log, Mail Log, Documents, and Time Slip) an additional data window that will display on the left side of the My Day Window.

My Day Index 2: Choose from the list (Calendars, To-Dos, Email, Phone Log, Mail Log, Documents, and Time Slip) a second additional data window that will display on right side of the My Day window.

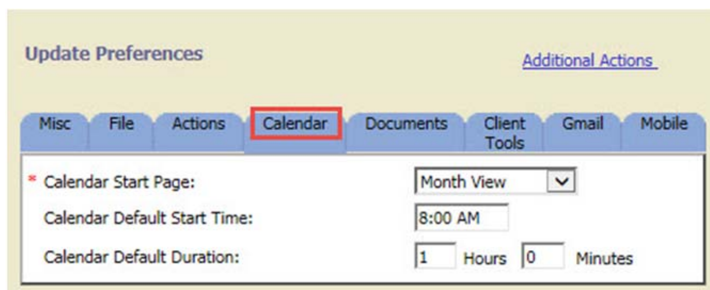
Note Preview Pane: Select Yes or No from the drop-down list to determine whether the Item Notes pane will display at the bottom of the *Legal Files* window. When selected, the Item Notes pane will display messages of a selected item without having to open it. For example, it will automatically display the file facts of a selected (or displayed) file; and the **Explanation**, **Message** and **Note** fields of a selected action item or Name Card. Additionally, a routed message will only display when the Note Preview Pane is set to Yes; otherwise, the routed item's detail window message, explanation, or note is displayed.

*NOTE: Legal Files recommends setting the **Note Preview Pane** option to Yes.*

Hot Print Preview: If set to Yes then when the user clicks on the Hot Print icon of a window, a preview of what will print is displayed and the user has the option to print.

Report Template View: Choose how the Report Template window displays templates, either a Search window or in a Tree view

On the "Calendars" tab:

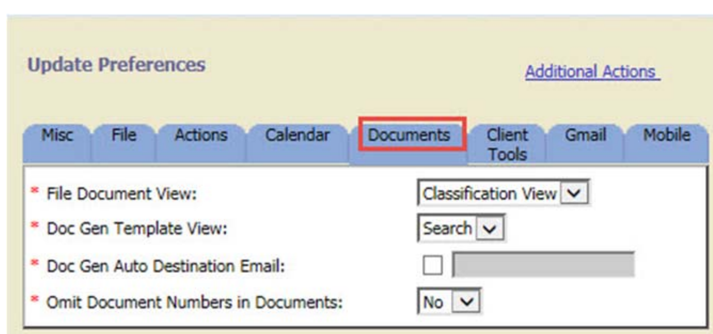


Calendar Start Page: Select List View, Month View, Week View, or Day View to determine how your calendar items display each time you click on the **Calendars** hyperlink or icon. Although these views can also be changed from icons positioned on every calendar view, the next time you log on, the view will revert to the view selected in your User Preferences.

Calendar Default Start Time: Indicate the default Start time when creating a new Calendar.

Calendar Default Duration: Indicate the default Duration (length) when creating a new Calendar item.

On the "Document" tab:



File Document View: Changes how the Documents window (on Actions menu) will display. **Recommended Setting:** *Classification*.

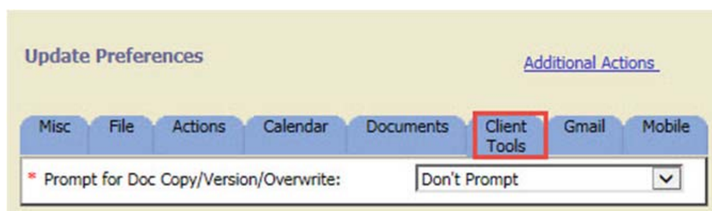
- **Search View** displays document list using the Advanced Document Search Window.
- **Classification View** displays documents grouped by Classification and Type.

Doc Gen Template View: Choose how the Document Generation window displays the Document Generation templates, either a Search window or in a Tree view.

Doc Gen Auto Destination Emails: Designed to be used when your office has an external document management system (and does not save documents within *Legal Files*) to Email documents that have been created by Document Generation. The document will be sent as an attachment to the Email address specified here.

Omit Document Numbers in Documents. Choose "Yes" or "No" to omit (or allow) document numbers (from the Document Detail window) from displaying on documents that are created through Document Generation or though the *Legal Files* Microsoft Word plug-in.

On the "Client Tools" tab:



Prompt for Doc Copy/Version/Overwrite: When saving documents via Microsoft plug-ins, users can be prompted with a dialogue box, with options to create a copy of the current document, create a version, or overwrite the original. Don't Prompt prevents the dialogue box from appearing. Any value other than Don't Prompt will cause the dialogue box to appear with the chosen setting as the default selection, but the other settings will also be available.

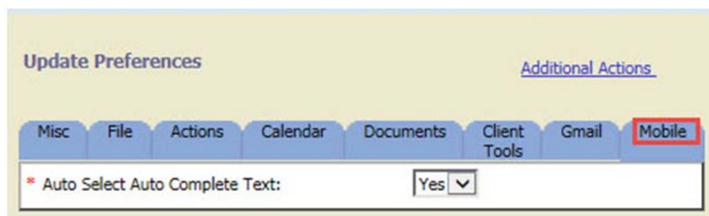
For more details on how this setting affects importing documents into *Legal Files,* see the "Managing Documents" section on page 153 of this manual.

On the "Gmail" tab:

Save Gmail as *Legal Files* Document: Choosing No saves Emails to Actions/Emails. Choosing Yes saves Emails to Actions/ Documents.

Save original Gmail as an attachment: When saving Emails as documents, choosing Yes in this field stores the original Email as received by Gmail as a separate file attached to a *Legal Files* Email or document.

On the "Mobile" tab:



Auto Select Auto Complete Text: If accessing *Legal Files* from an iPad or iPhone – and Auto Complete is selected on that device – the same functionality is available when entering data into *Legal Files* from that device.

Update Users:

All Active: If your user account has proper security rights then you see this option. Choosing this will set ALL users' preferences to match these settings.

Select Users: If your user account has proper security rights then you see this option. Choosing this will select which users' preferences will be set to match these settings.

- Click on the Save button to save your preferences and close the window, or click on the Cancel button to close the window without changing the settings.
- Changes made to fields denoted by an asterisk will not take effect until you log out and back in again.

About Heads Up Notices

Use the Heads Up list view to display all your Heads Up notices. The Heads Up notification window can be displayed as its own window from the **Heads Up** hyperlink along the top of the

Legal Files window or within the Manage My Day view. Regardless of how it is viewed, Heads Up is a notification window that periodically polls *Legal Files* for new messages.

Messages displayed in Heads Up are stored in their appropriate action items search lists, such as Calendar, Email, Phone log, etc. When you remove an item from Heads Up – by clicking on the garbage can in that row -- you are only deleting the shortcut. The item is not deleted and remains in its action item search list.

*NOTE: A single click on the **Trash Can** icon in Heads Up removes the item immediately with no further action from you. Removing an item from Heads Up does not delete the item from its corresponding Action Item list, however.*

Any **Heads Up** notification you remove can be restored by clicking the green arrows at upper right of the Heads Up display. You will then see a list of the items removed that day; click the green arrows in the first column of a row to restore that record. To return to your standard Heads Up view, click the blue arrows at upper right. Removed items may be restored only during the same day; that list will be cleared the following day.

Displaying the Heads Up List

Click on the Heads Up hyperlink on the upper, center area of the main window to display just the Heads Up List window. This view allows you to see at a glance the basic contents of the notice. From this view, you can:

- Click on the action item icon to display that item's detail window.
- Click on the Reference column's hyperlink to open the referenced file.
- Click on the Trash Can icon to remove the item from the Heads Up list. Removing the item from the Heads Up list does not remove it from the *Legal Files* database; it remains in its corresponding action item until you remove it from that location.

Opening a Heads Up Item

1. Single-click on the corresponding action item icon in the Heads Up list or double-click on a Heads Up listing to open the details window for that item.
   a. The details window displays as a separate pop-up window for the selected item.
   b. Although you can manage every aspect of this action item from here, we will learn how to do so in "Using Action Items" on page 96.
2. Close the detail window to return to Heads Up list.

Deleting a Heads Up Item

Click on the **Trash Can** icon in the left-side column of the Heads Up window to remove that item from this list.

The item is deleted immediately with no further action from you, and the subsequent displayed items move up accordingly.

Manage My Day

Concept

The Manage My Day view generally displays in the interior window upon logging onto *Legal Files* for the first time, and is often chosen by users as their default view because of its versatility.

In some ways, the Manage My Day view functions as an electronic day-timer. For any given day in your day-timer, you can make a note of the day's appointments, tasks to do, and daily reminders -- all from a single-view.

And, just as you can flip back through a traditional day-timer to view past and future dates, you can use the Manage My Day view to look at and work with activities for previous days, months, and years. In effect, you can manage any day in any year.

Besides managing your appointments and tasks, the Manage My Day view also allows you to open and work with your recently accessed files, documents and Emails saved on any given date, and recently received Heads Up notices.

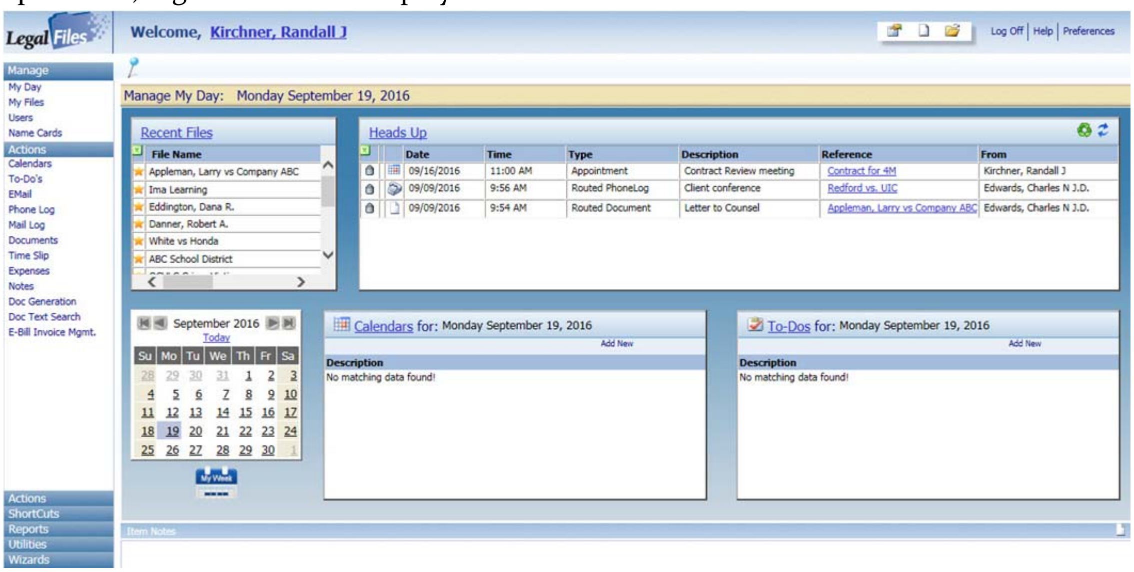
Chapter Lesson

In this lesson you will learn how to use the Manage My Day view to access your recently received Heads Up messages, work with recently accessed files, view your calendar events and tasks, and use the calendar to view items for another day, month, and/or year.

Manage My Day

Use the Manage My Day view to manage many aspects of your day from one view. This view defaults to the current date, but you can use the calendar to view items for another date.

Changing the Manage My Day date does not affect the Recent Files or Heads Up windows; these windows will always display your most recently accessed files and most recently received Heads Up notices, regardless of the displayed date.



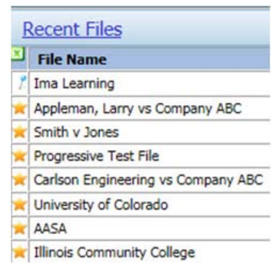
However, changing the date will affect the displayed date specific To Do's for: windows. These windows are date specific; they display the Calendars and To Do's for the selected date.

Displaying the Manage My Day View

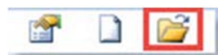
If the Manage My Day view is not already displayed:

Click on the **My Day** hyperlink on the menu, left of the main window, to display the Manage My Day window. Notice the main window title bar displays Manage My Day and today's date.

Displaying Recently Accessed Files



Use the Recent Files window on the upper-left-side of the Manage My Day view to open your most recently accessed files. You can also access this list by clicking the yellow folder icon in the upper right section of the Manage My Day view.

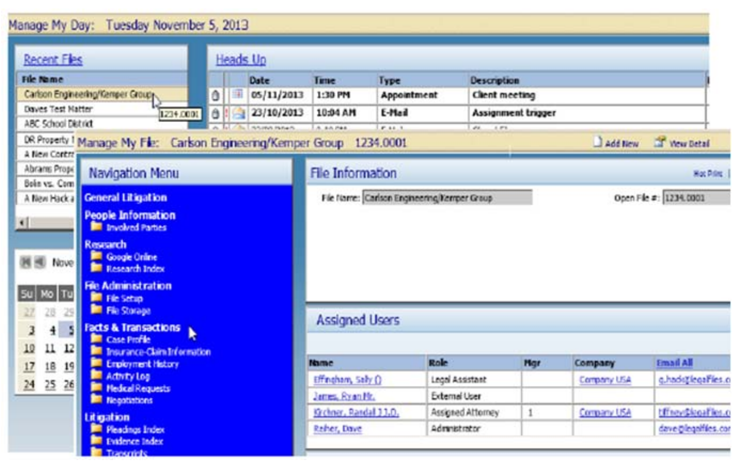


This window lists your most recently accessed files, displaying the most recently opened file at the top of the list.

Each file name is preceded by a star icon. Clicking a star changes that icon to a pin, and moves that file to the top of the list, where it will remain at the top of your list even as you open more files. Use this feature to “pin” one or more often-visited files to the top of your Recent Files. Click the pin icon and it reverts to a star; that file will now rotate off Recent Files naturally.

The order of “pinned” files will be reflected in: Manage My Day (freestanding box and “yellow folder” list), *Legal Files* Drop Zone, Microsoft plug-ins (Outlook, Word, etc.), and Acrobat plug-in.

To Open a Recently Accessed File

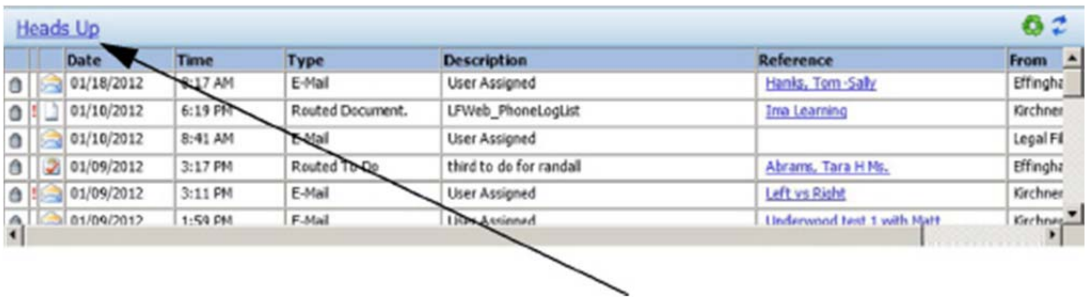


1. Double-click on a file name to open that file. The Manage My File window now displays. Notice the title bar for that window displays Manage My File and the file name. The Navigation Menu, File Information, Assigned Users, and File Related People windows are displayed. You can manage every aspect of this file from here. We will learn how to create, update, and delete files in “Managing My Files” on page 34.
2. Click on the **My Day** hyperlink on the left of the main window to return to the Manage My Day window.

Accessing Recent Heads Up Notices

Use the Heads Up window in the upper-right-side of the Manage My Day view to access your Heads Up notices. Use the scroll bar on the right to move through the list.

From this view, you can open an item's detail window; you also can remove an item from the list.

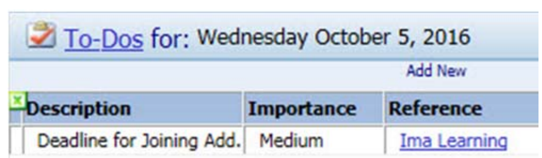


This Heads Up window has all the functionality of the larger Heads Up window (available from the **Heads Up** hyperlink along the top of the window), and is placed here for your convenience in accessing your notices. See "About Heads Up Notices" on page 25 for information about managing your Heads Up notices.

Managing My Day's To-Do's

The To-Do's for: window, in the lower right of the Manage My Day view, lists your tasks for the displayed date. See "Establishing Preference Settings" on page 19 for information on how to change the information displayed here.

From this window you can do the following:



- Create a new task by clicking on the **Add New** hyperlink near the top of the To-Do's for: window.
- Delete an existing task by highlighting it in the list, then clicking on the **Delete** hyperlink near the top of the To-Do's for: window. The **Delete** hyperlink is not visible until an item is highlighted.

NOTE: Deleting a record here deletes the record from the database.

- Double-click on a listed item to view the To-Do Detail window for that item.

Although you can manage every aspect of a task from here, we will learn how to create, update, and delete tasks in "Managing To-Do's" on page 117.

Managing My Day's Calendars

The Calendars for: window, in the lower center of the Manage My Day view, lists your calendar events for the displayed date.

From this window you can do the following:

- Create a new event by clicking on the **Add New** hyperlink near the top of the Calendars for: window.
- Delete an existing event by highlighting it in the list, then clicking on the **Delete** hyperlink near the top of the Calendars for: window. The **Delete** hyperlink is not visible until an item is highlighted.

NOTE: Deleting a record here deletes the record from the database.

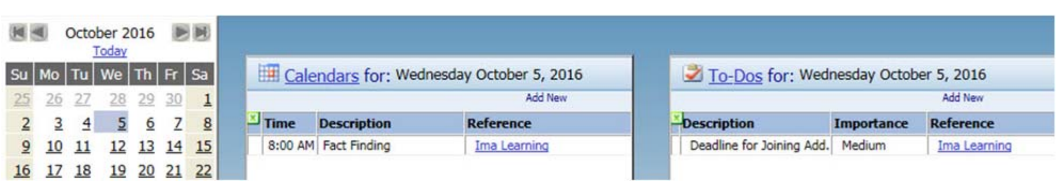
- Double-click on a listed item to view the Calendar Detail window.

Although you can manage every aspect of an event from here, we will learn about creating, updating, and deleting events in "Managing Calendars" on page 104.

Managing To-Do's and Calendars for Another Date

Although the Manage My Day window defaults to today's date, you can use the Calendar on the lower-left-side of the Manage My Day view to change the view to another day, month, and/or year.

The calendar defaults to the current month and year, and today's date is highlighted. You can use the Calendar displayed within this view to view another day, month, and/or year.



The items within the To-Do's for: and Calendars for: windows change according to the change in dates.

Click on another day on the calendar to change the Manage My Day view to display items for that day. Use the arrow buttons along the top of the calendar to change the dates as follows:

- Click on right-facing interior button to advance to the next month; click on the right-facing exterior button to advance to the next year. 
- Click on left-facing interior button to display the previous month; click on the left-facing exterior button to display the previous year 

My Week View

Clicking the **My Week** icon under the graphic calendar will let you view all of your Calendars and To-Do's by a work week (excludes weekends) in one easy step.

Managing My Files

Concept

The My Files view allows you to list, search for and report on all your files in the *Legal Files* database. Comprehensive reports can give you summary and detail output for individual files, or groups of files based on the search criteria entered.

For reporting and searching purposes, *Legal Files* uses four basic types of files: Contact, Legal, Office and Private.

NOTE: Contact, Legal, and Office are the default terms used. These names may have been customized to fit your office's needs.

Additionally, these four file types can be categorized and sub-categorized further based on how your office has customized *Legal Files.*

A *Contact file* is sometimes used for initial inquiry or investigation files. A Contact file is easily converted to a Legal file.

A *Legal file* organizes information about any type of file or matter. A Legal file contains information pertaining to your case, file, or matter, such as file related contacts, matter-specific data windows, and all pertinent deadlines, documents and Emails.

An *Office file* is used for general office administration data, such as forms, office policies and procedures, and supplier/vendor information, just to name a few. An Office file lets you use all the features of *Legal* Files to manage data that is not directly related to a legal case or matter.

A *Private file* generally is used for confidential issues or matters. A private file can only be seen/opened and viewed on reports by users that have access to that file. If needed, a private file can be password protected.

Chapter Lesson

In this lesson you will learn how to use the My Files view to search your file list, create a file, open a file, convert a file from one type to another, and maintain a file.

Managing My Files

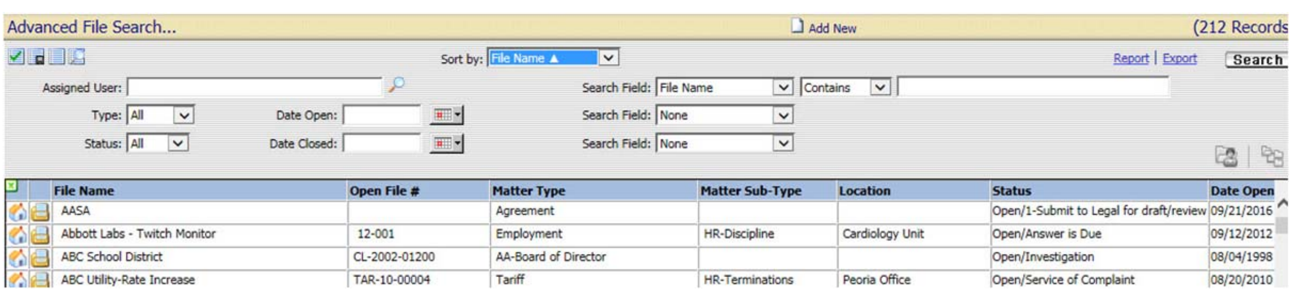
Use the My Files view to list and manage all your files. You can do the following from the My Files view:

- Add a new file.
- Open to view and manage key aspects of a file (such as file administration, file users, file-related people, and file data windows).
- Create and manage file-related Action items.
- Establish saved search criteria to filter your file lists, including the ability to create/ save multiple searches you use on a regular basis plus establish the default criteria for which files appear in the list upon opening the My Files view and/or
- Fill in search fields and click on **Search** to display the file(s) matching the selected criteria.
- Re-order the columns. Simply click on a column heading and move it to its preferred location. The new column order will be retained for that user on that machine until changed.

Displaying and Navigating the My Files View

Use this section to orient yourself to the My Files view before moving to the specifics of creating and managing specific files.

1. Click on the **My Files** hyperlink on the left of the main window to display the My Files window.



*NOTE: The heading across the top now displays a file name next to **My File**: The file name is a hyperlink which defaults to the first file in the list or another file you click to select; the file number also is listed, if one is available.*

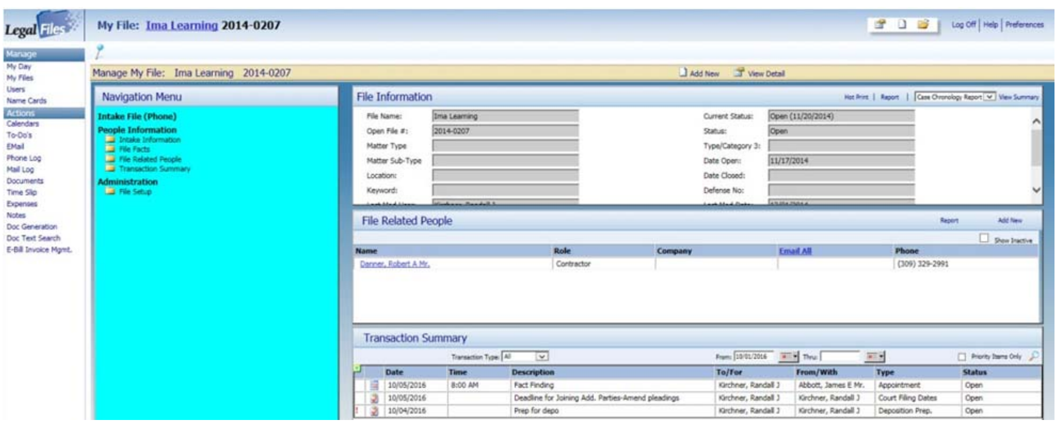
- The Advanced File Search window is now displayed
- The list of files initially displayed in the Advanced File Search window depends on your Default search criteria, if any are set (e.g. a typical default search might be All types of files

that are in an Open status). See "Using "Using the Advanced Search Settings" on page 56 for information about using Advanced Search.

- The table format of the file list allows you to see some file data at a glance, without opening the file.

2. Identify a file to open and go to that file's home page by using one of the following methods:

- Double-click anywhere in the row that is NOT an icon,
- Click on the **Home** icon, or
- Click once on the name of a file, then again on the name listed at the top in the My File: hyperlink



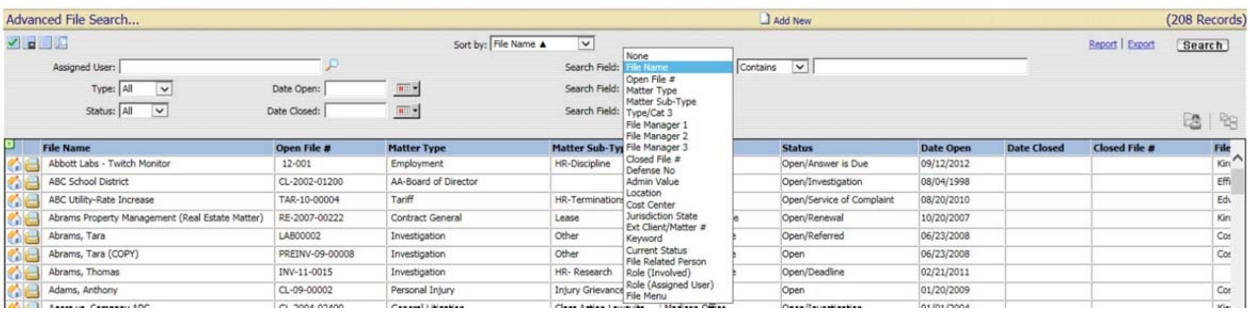
Finding and Opening a File

For your convenience, *Legal Files* provides many ways to find a file. One way is to use the scroll bar to scroll through the file list until you find the file you want, but this method can be time consuming and inefficient if you have more than a handful of files. Another way is to select the file from the Recent Files list of the Manage My Day view, which displays the files you have most recently accessed.

To Find and Open a File Using the Advanced File Search Window:

The Advanced File Search allows you to use a variety of criteria to narrow or broaden the search you wish to execute. It also allows you to name and save search criteria settings so you can use those same searches, at a later time, without having to reenter the criteria over again.

NOTE: The search options available in the various Advanced Search windows will vary, but they all function similarly.



Advanced File Search criterion filters:

Assigned User - The Assigned User field defaults to the logged in user or you can select a different user or else clear this field to search files regardless of the assigned user.

Type - Specify which Type of file search results must match.

Status - Specify whether the file(s) to search are in Open or Closed status.

Date Opened & Date Closed - Look for files Opened on/after a certain date, Closed on/before a certain date or within a date range using both fields.

Search field(s) - You can use up to three additional Search Fields. The drop down list for each contains the same fields from which to choose.

Sort By: Sort search results by a variety of factors, each of which can be sorted forwards/backwards, and can be retained in default searches.

NOTE: If field name(s) have been changed in Custom Prompts that name change will be shown in the names shown on this list.

NOTE: For some search fields the qualifiers (Exact, Contains, Sounds Like, or Begins With) are used in conjunction with the search criterion selected. For example, you might search for File Names that Begins With Smith or File Names that Contain Smith somewhere in the File Name.

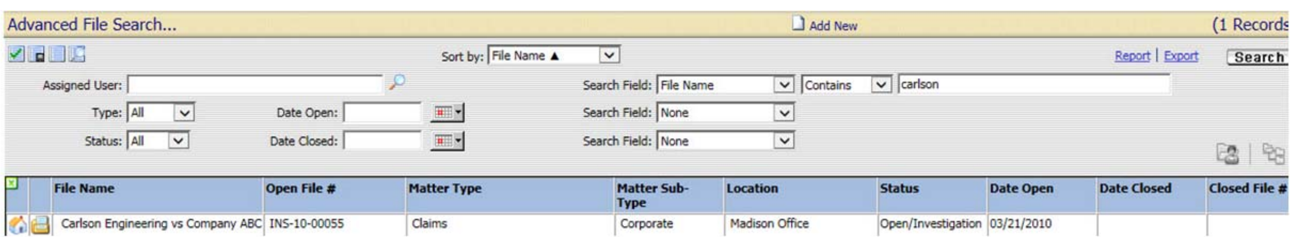
Filters Used with File Name, Open File#, Closed File #, Defense No, Jurisdiction State, Ext. Client/Matter #

Exact	Use to match exactly what is entered in the search field.
Contains	Use this to match something that contains what is entered in the beginning, middle, or end.
Sounds Like	Use this when looking for a match that would sound similar but might have a different spelling.
Begins With	Use this when looking for a match that begins with what is entered.

- **File Name**: Enter all or a portion of the File Name.
- **Open File #:** Enter all or a portion of the Open File #.
- **Type/Cat 1:** Choose from the Type/Cat 1 pick list.
- **Type/Cat 2:** Choose from the Type/Cat 2 pick list.
- **Type/Cat 3:** Choose from the Type/Cat 3 pick list.
- **File Manager 1:** Choose user that has been Assigned to the file(s) as File Manager 1.
- **File Manager 2:** Choose user that has been Assigned to the file(s) as File Manager 2.
- **File Manager 3:** Choose user that has been Assigned to the file(s) as File Manager 3.
- **Closed File #:** Enter all or a portion of the Closed File #.
- **Defense No:** Enter all or a portion of the Defense No.
- **Admin Value:** Choose from the Admin Value pick list.
- **Location:** Choose from the Location pick list.
- **Cost Center:** Choose from the Cost Center pick list.
- **Jurisdiction State:** Enter all or a portion of the Jurisdiction State.
- **Ext Client/Matter #:** Enter all or a portion of the Ext Client/Matter #.
- **Keyword:** Enter all or a portion of the Keyword. *(Keyword can be a pick list; ask your Legal Files administrator if interested.)*

- **Current Status:** Choose from the Current Status pick list.
- **File Related Person:** Enter in the name of a person or company that has been related to the file(s).
- **Role (Involved):** Choose a role for a person or company that has been related to the file(s).
- **Role (Assigned User):** Choose a role for an a user that has been Assigned to the file(s)
- **File Menu:** Choose the (Navigation) Menu used on file home page(s).

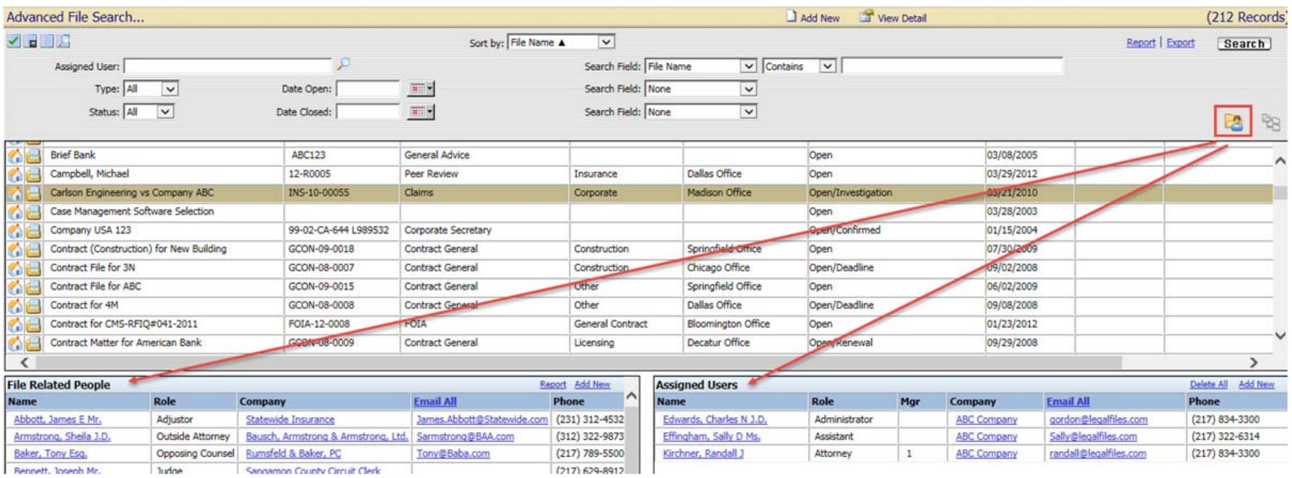
1. In this example for the Search Field choose File Name, then Contains as the Qualifier and enter the name of a file you have created or know that exists. (In this example we search for any files containing Carlson in the File Name.)
2. Click on the Search button in the upper-right corner of the window.
   Do you see your file? Note: The My File: hyperlink listing has changed.



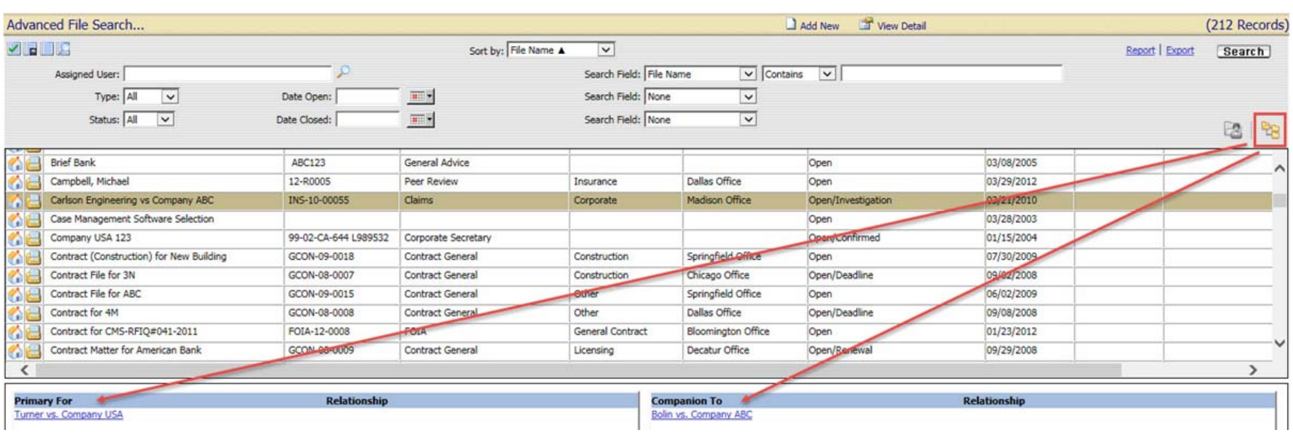
Set and re-set Advanced Search filters until you arrive at a preferred setting you want to KEEP – this can be set as your Default Search, which will automatically populate every time you visit this page. See page 56 for more information on Default and Saved Searches.

3. Buttons allowing you to view File Related Person, Users, and Related File information for selected files in the list appear in the lower right area of the Advance File Search. This can be helpful to discern the difference between similarly named files, or just to see additional details of the files selected.
   a. Click on the row of a file to select it, and then click the Show File Related People Pane icon. Lists of the current File Related People and Assigned Users appear at the bottom of the screen.

Managing My Files



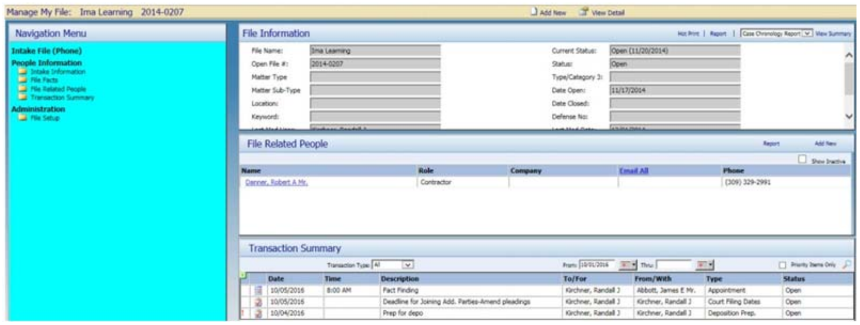
b. Or, after clicking on the row of a file to select it, then click the Show Related Files Pane icon. Lists of the files related to the highlighted file appear at the bottom of the screen.



4. Click on the **File Home page** icon next to the file name listing or on the **My File:** hyperlink (at the very top of the page) OR double- click row item in the Advanced Search window (for the file) to open it.

The File Menu view is displayed for your file.

5. The File Menu Display is home base for your file. From here you can manage the contents of the Navigation Menu folders, view basic file information, view and manage assigned file users and file related people, and access the File Details window.



Creating a File

Although creating a file may only be done by a few people in your office, knowing the theory and logic behind creating a new file may help you determine how and where to enter the information for which you are responsible.

NOTE: Remember, the extra few minutes spent entering data during the initial file setup and file maintenance could save hours when it is time to get information out of the system.

Once a file is created, you can change its file type without losing any data that has already been entered, and you can modify the file details as needed thereafter.

To create a file manually:

1. Click on the **Add New** hyperlink in the top-center of the My Files window.

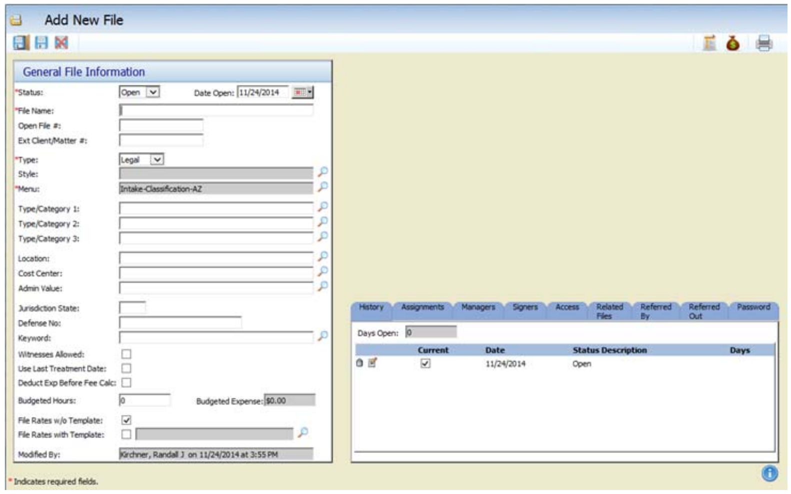
The Add New File window is displayed, featuring the General File Information, History, Assignments, Managers, Signers, Access, Related Files, Referred By, Referred Out and Password tabs.

NOTE: A red asterisk (*) next to a field name indicates that data is required in order to create the file. Although only a few fields require data, consider entering data in as many fields as you can, since the more data you put in, the more data you can extract by way of reports and such.

NOTE: The following field names may have been customized to fit your office's needs.

Managing My Files

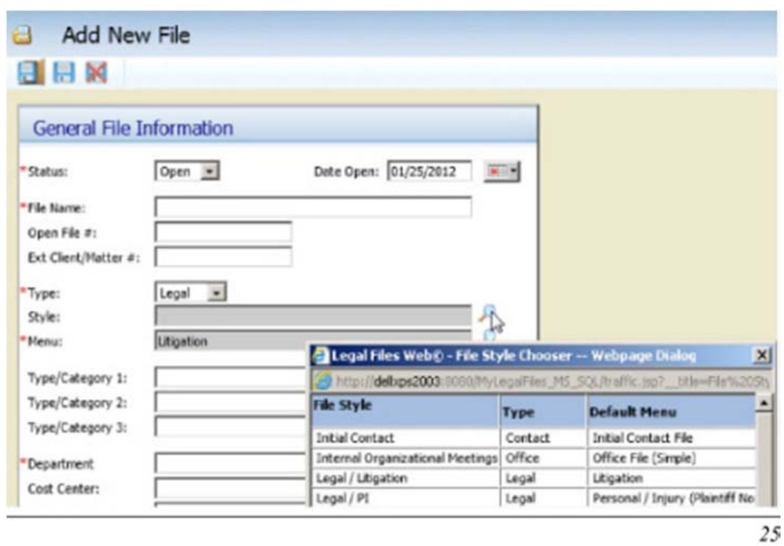
The Status field is set to Open (which is the default setting for new files).



2. Date field defaults to today's date. Change if desired.
3. Enter a file name in the File Name field.

NOTE: Your department or office may want to establish some file naming standards. For example, agree whether to enter the names by last name, first name or as first name last name. This will make it easier when searching the file lists by file name.

4. In the **Type** field choose whether this is a Contact, Legal, or Office file
5. If your office uses File Styles, you may click on the magnifying glass icon next to the **Style** field, File Styles are a combination of File Type (e.g. Contact, Legal or Office) and File Menu.



After choosing a File Style notice the **Menu** field is automatically populated (because the selected file style has a menu associated with it).

Even though the File Style has automatically entered an associated menu, you can override the auto-entry in the **Menu** field by clicking on its magnifying glass icon and selecting an item from the File

Menu pick list. The new selection will replace the auto-entry, and leave the Style field's entry unchanged.

If your office does not use File Style, you will need to select a Menu to be used by this file.

6. Enter data in the following fields as needed:

Open File #. If your office uses file numbers to track files, that number is entered here. Your office can choose to auto-fill the field, by way of an administrative setting.

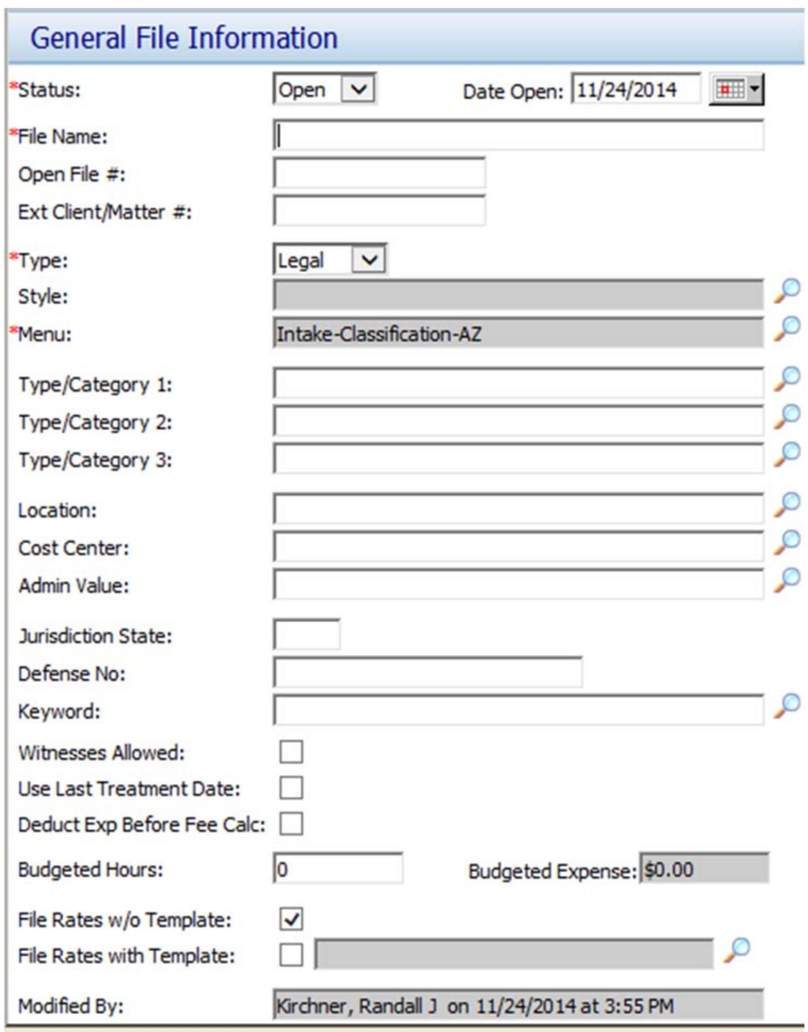
External Client/Matter #. The data entered can appear on a variety of reports.

Type/Category 1, 2, and 3. These three fields can be used to define the particular type of file and to let you filter and sort reports by Type/Category. Use the magnifying glass icons to specify up to three types/categories (1, 2, and 3).

Location. Use the magnifying glass icon to select the file location. This field can be used for file search criterion and for reporting.

Cost Center. If your office uses cost centers, use the magnifying glass icon to select which cost center.

Admin Value. Use this field to assign a descriptive value to the file (e.g., high, medium, low). You can use



this value to filter the File Query report. Use the magnifying glass icon to select the value.

Jurisdiction State. Enter the two-character state abbreviation in this field. This data can be used to filter various reports.

Defense No. The data entered can appear on a variety of reports.

Keyword. Use this field to enter a key word for searching. Use the magnifying glass icon to select a keyword or type a keyword in the field.

Budgeted Hours. The hours you enter can be used to report against actual and billable time entered into the Time Slips window.

Budgeted Expense. This field is helpful if you track a budgeted amount of money on the file. The amount you enter here will appear on the Expense Selection window; *Legal Files* will track your expenses in the file against the budgeted expense entered here.

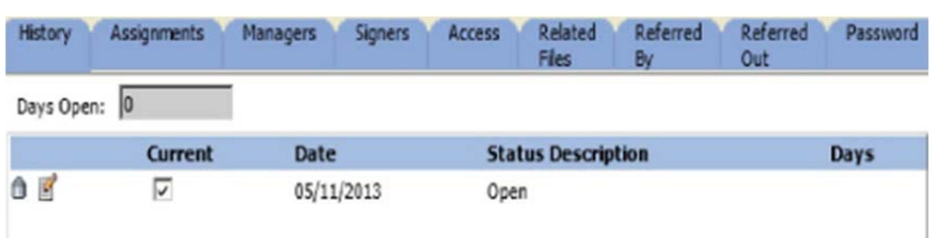
7. Select one of the following file rate check boxes, as needed:

File Rates w/o Template. Select this check box to establish file rates unique to this file.

File Rates with Template. Select this check box to apply established file rates from a template, and then click on the magnifying glass icon to select the rate template.

NOTE: The names of the above described fields can be changed (e.g. to serve a slightly different purpose). The fields can also be hidden from displaying, if your office has no need of one or more. Maintaining these fields is done from Utilities > Administration > Custom Prompt Management.

7. Track the file status and history from the History tab.



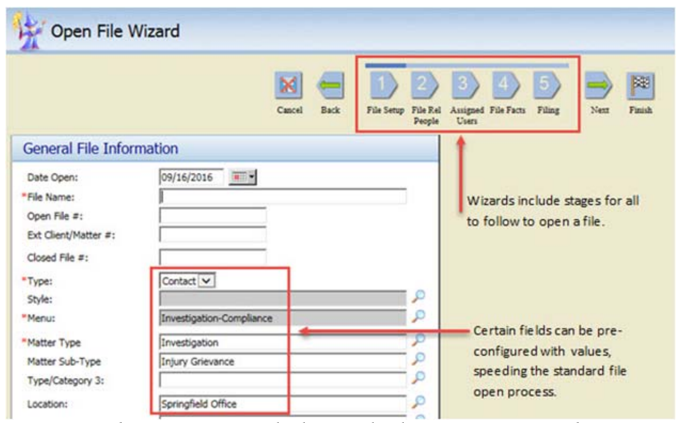
NOTE: The file's status defaults to Open, the date the file was created (i.e., opened), and the number of days it has been open. Additional current file status options can be configured for your office.

The data in the **Days Open** field (and its corresponding Days column) are automatically updated, but the other columns remain set until you choose to change them.

8. Click on the **Save** button to save your General File Information to the window. The window remains open, ready for you to specify additional file details. See page 41 for more information "To Create a File Manually."

To create a file with an Open File Wizard:

Open File Wizards automate the process of opening a File, leading the user through steps/stages needed to open a new File. Different wizards can be created by your *Legal Files* administrators for different file types. Open File Wizards simplify file creation by combining common file opening processes into one series of steps.



To see the Open File Wizards available, select the **Wizards** menu, and then click on **Open File.** Access to this feature is available with the proper security.

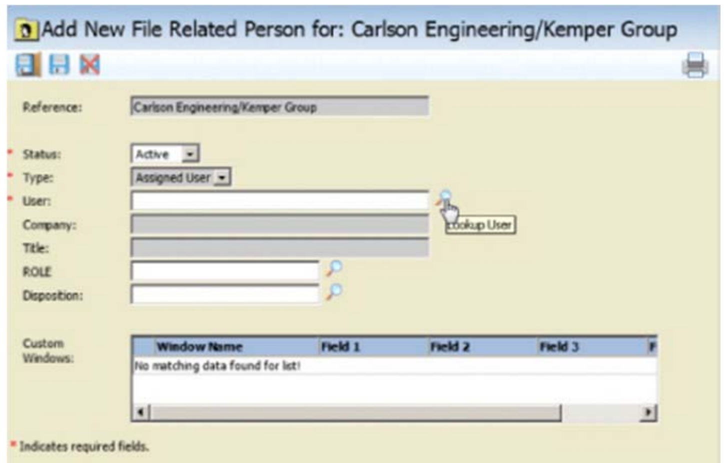
Use the File Details window to specify the ways in which your file works. You already learned about the General Information and History settings on the File Detail window -- you can add, modify or remove information from these sections at any time. In this section, you will learn to assign file users, file managers, file access, and how to relate a file to another file.

Assigning File Users

Use the Assignments tab on the file detail window to add users to the file. Users can be assigned either individually or as a team. Assigning a team of users is a convenience; once assigned, you can add or remove individual users from the Assignments tab as needed.

1. Click on the Assignments tab.
2. Click either the **Add New** to add an individual user, and:
   a. The Add New File Related Person window displays (See example window below)

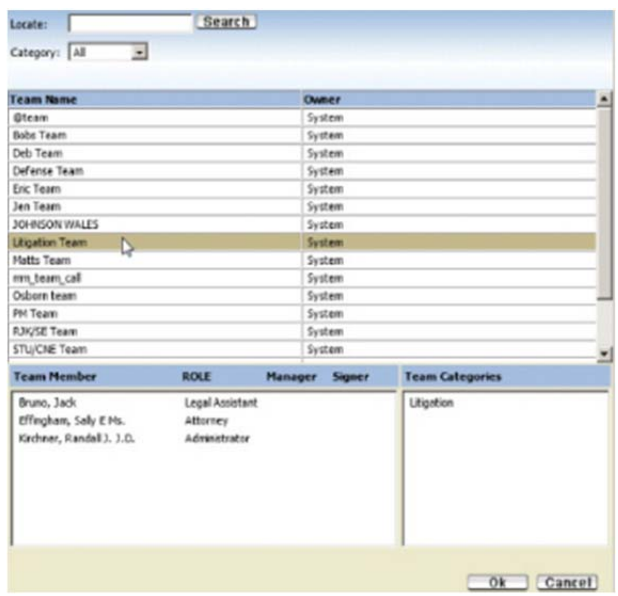
b. Notice that the **File Related Person Type** defaults to Assigned User.
c. Click on the **Lookup User** icon and select a user from the list.
d. Next select the **Role** for this user.
e. Fill in any remaining fields as needed Click **Save & Close** or **Save** to add this Assigned Users to the file



3. OR, Click on the **Add Team** hyperlink for the Add Team method. The Team pick list displays.

NOTE: Creating and managing teams is an administrative function accessed through the Legal Files desktop/administrative menu. You can click on and select a team to see which users are members of that team.

a. Click on a team to select it (in this example we select the Litigation Team). Notice the team members may already have defined roles and manager positions.
b. Click on the **OK** button to close the window and add the team of users to the Assignments tab.



NOTE: The users in the team are listed according to the data set up using Team Management in Legal Files Desktop.

4. After adding the team you can add, modify, or remove the assigned users through the Assignments tab as needed.
    a. To modify or delete one of the users - highlight that user. Additional hyperlinks will display.
    b. Click on either the **Delete** (to remove the user from the file) or **View Detail** (to edit that user's data).

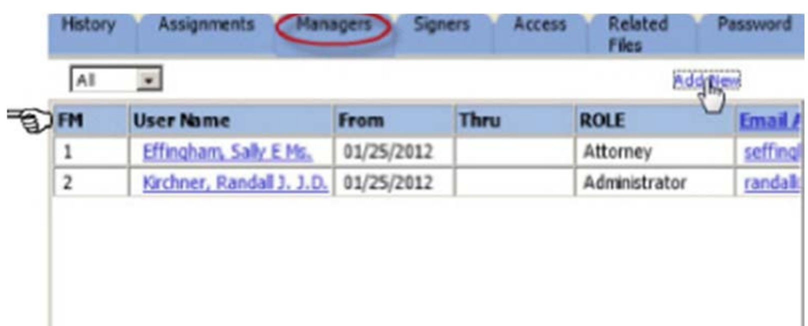
NOTE: Users can be Assigned to (or maintained in) a file using the same steps described above but from a different window, (the File Home Page). The Assigned Users preview pane will show on the File Home page if (in User Preferences) either File Home Index 1 or 2 are set to display Assigned Users.

Assigning & Maintaining File Managers

Use the File Managers tab of the File Detail window to add, modify or remove file managers. File Managers are assigned users who have responsibility for the file. You can assign up to three file managers in each file. File Manager data is used extensively to filter reports and assign tasks via Work Flows. Document Generation also uses File Manager tokens in its templates.

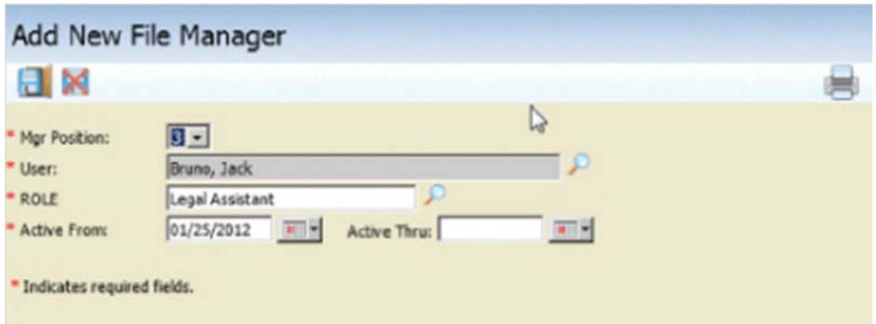
1. Click on the Managers tab from the File Details window.

NOTE: Based on how the members were defined, in the team used above, two of the three file managers have automatically been entered. Teams can also include pre-assigned File Managers. All predetermined settings save time when opening files!



2. Click on the **Add New** hyperlink.
   The Add File Manager window is displayed.
3. Since manager positions 1 & 2 are used change the Mgr Position field to 3.
4. Click on the magnifying glass icon next to the **User** field.

The User pick list is displayed, listing those *Legal Files* users which have been assigned to the Carlson Engineering file.



- Highlight Jack Bruno on the list.

Do not click on the icon next to the user name unless you want to view the user's Name Card Detail window.

- Click OK to close the pick list and add that user's name to the User field.

*NOTE: Because Jack already had a defined role (within the Team you selected) when you assigned him to the file, the **Role** field is automatically filled in.*

5. Leave the **Active From** field set to today's date and leave the **Active Thru** field blank.
6. Click on the **Save & Close** button to close the window and add Jack to the Managers tab, along with the two pre-defined file managers.
7. Click on the Assignments tab. Notice that Jack's Mgr column now displays the file manager position you just assigned for him.

Assigning & Maintaining File Access

If your office's security settings in *Legal Files* require that users must be assigned to a file in order to access that file, then use the Access tab on the File Detail window to determine which *Legal Files* users can access the file. By default every user assigned to the file will have access to the file.

Although users are automatically assigned file access upon being added as an assigned file user, you may want some users to have file access without being an assigned file user. For example, a department or office manager may want access to every file in the department or office, but does not want an assigned role in the file (per assigned users), and does not want to appear in various reports filtered by assigned users.

To assign file access to a user who is not an assigned user:

1. Click on the Access tab on the File Details window.
2. Click on the **Add New** hyperlink.

   The Grant Access to users window is displayed.

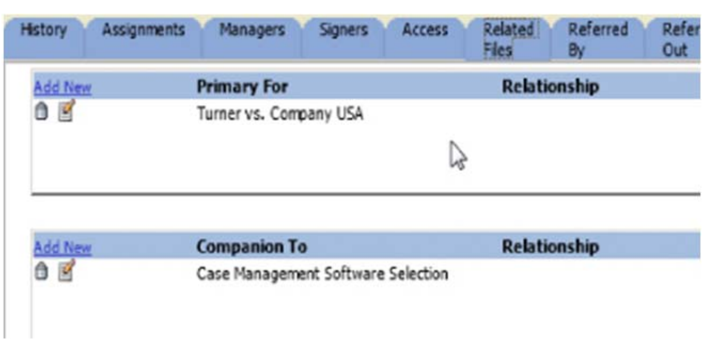
3. Click on the box next to Abrams, Sarah Mrs. to give her file access. You can select as many boxes as you want.
4. Click on the **OK** button to close the window.

Sarah is now listed along with Jack Bruno, Sally Effingham, and Randall Kirchner, who were granted file access automatically when assigned to the file.

NOTE: To remove a user's file access, highlight the user in the list, and then click on the ***Delete*** *hyperlink.*

Assigning Related Files

Use the Related Files tab of the File Details window to add, modify or remove related files to your displayed file. The Related Files tab shows only that a relationship exists between the files. It does not provide a hyperlink to the files, and no data is shared between the files. Examples of related files might be a situation where a file was opened for a matter involving two parties. Then the two parties are separated into individual files. Or you may use Related Files when you have a master contract related to various amendments. In these situations, you might want to indicate the two files are related to each other.

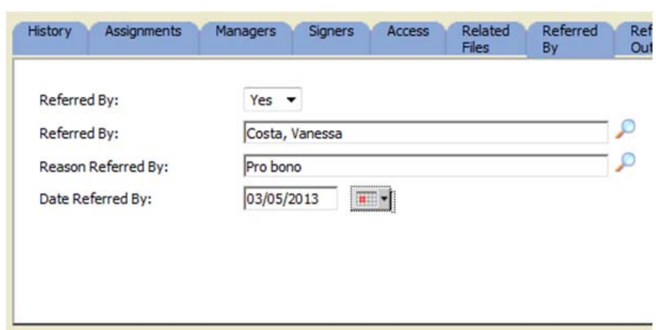


Best Practice: If relating files, consider showing the Related Files window on your file home page (controlled in User Preferences). This shows hyperlinks between related files, making them only one click away!

1. Click on the **Related Files** tab from the File Details window. The Primary For: section lists the related files that subjugated to this file. The Companion To: section lists the related that are 'master' to this file. Both sections allow you to insert, update, and delete the relationship. The **Delete** and **Edit** icons become visible once a file has been added.
2. We will not relate any files to the one you have created, at this time, so click on the **Save & Close** button of the File Detail window to save your changes, close the window and return the File Menu Display.

Tracking Referrals

Keeping track of who has referred a case to you or who you have referred a case out to can be a useful tracking or marketing tool. Use the Referred By tab to document if and when a file has been referred to you, by which File Related Person, and for what reason. Use the Referred Out tab to document if and when you have referred a file, to which File Related Person it has been referred, and for what reason.



1. Click on either the **Referred By** tab or the **Referred Out** tab, as needed.
2. Setting the first field on either tab to Yes activates the other fields on the tab.
3. Set the other values on the tab as needed. **Save & Close**.

Assigned Users

If selected in User Preference, Assigned Users are displayed on the File Menu Display. This window permits you to view at a glance the name, role, company, and Email address of every user assigned to the file. If a user also is a file manager, the users file manager number can also be viewed from here. The Inactive check box allows you to see a list of users that have been marked as inactive for this file. The Add New or Add Team hyperlink lets you assign users to the file.

You can add and remove file users from here as needed. Any changes made here are also reflected on the Assignments tab of the File Detail window. Every assigned user is also a file-related person.

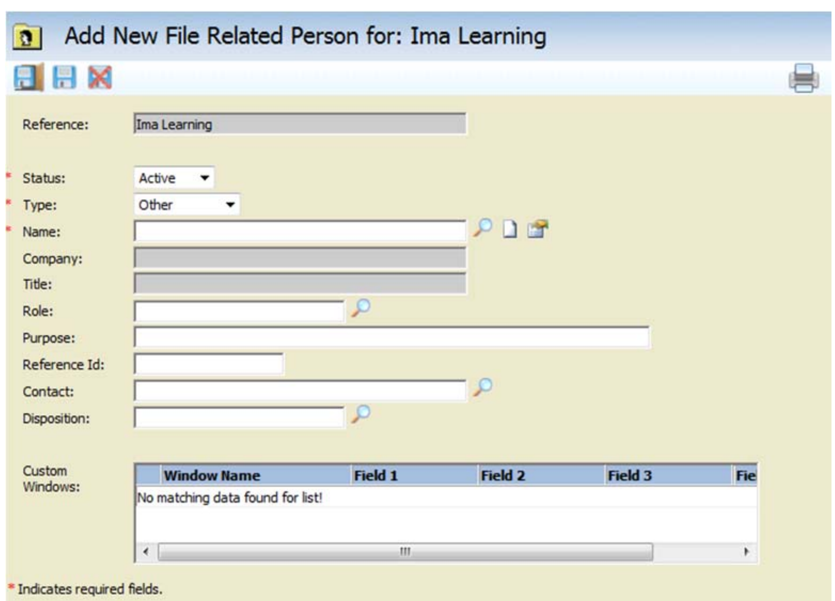
Adding a File Related Person or Company

The File Related People pane of the File Menu display lists the people who are involved in the file, but are not assigned users; the assigned users are displayed in the Assigned Users pane.

- Assigned Users are selected from the user pick list, which lists the *Legal Files* users at your office or firm.
- The file-related people are selected from the Name Card pick list.

Other than that distinction, the File Related People pane functions like the Assigned Users pane, allowing you to see at-a-glance the name, role, company and phone of every person or company involved in the file. If you put a check in the **Inactive** check box the pane will display a list of File Related People (whose Name Cards have been marked Inactive). The **Add New** hyperlink lets you add a File Related person or company to the file.

If the person or company you want to relate to the file does not have a Name Card, you can create a Name Card "on the fly" using **Add New Name Card**.



To make a person or company file related:

1. From the File Related People panel of the file menu display, click on the **Add New** hyperlink.

   The Add New File Related Person window is displayed; the required entry fields are denoted by a red asterisk (*), and the **Reference** field automatically displays *Ima Learning* as the file reference.

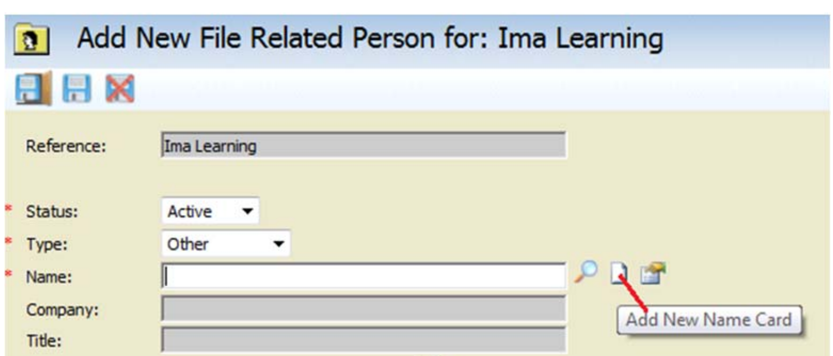
In fact, this Add New File Related Person window looks a lot like the window that displayed when you added a new user, with one important distinction

- When Assigning a User, the **Type** field defaults to Assigned User, and no other option is available.
- When opened from the File Related People pane, several options are available from the **Type** field's drop-down list. This list is hard-coded, meaning the values cannot be changed.

The **Type** field determines how this person or company is related, or involved, in the file; it is primarily used for reporting purposes and with the Document Generation module, as decided by your office. Other is displayed by default, but you can use the drop-down list to select other options such as Client, Outside Rep, and Third Party.

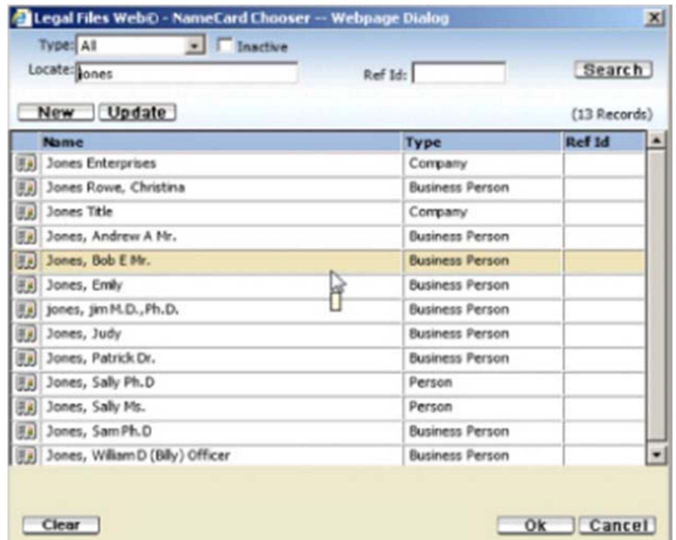
- If you select Client, Plaintiff or Defendant from the **Type** drop-down list then the role field is automatically filled with Client, Plaintiff or Defendant (respectively). And the magnifying glass icon, for **Role**, is no longer available. In other words, the type and role are the same.
- If you select Other, Outside Rep, or Third Party from the **Type** drop-down list then you will need to select the role for this File Related Person.

2. Click on the magnifying glass icon next to the **Name** field. The Name Card pick list is displayed.
3. Type in a name (e.g. Johnson) and click on the **Search** button to load all the Name Cards into the pick list, or enter a letter and then click on the Search button to display the Name Cards beginning with the letter or letters you entered.

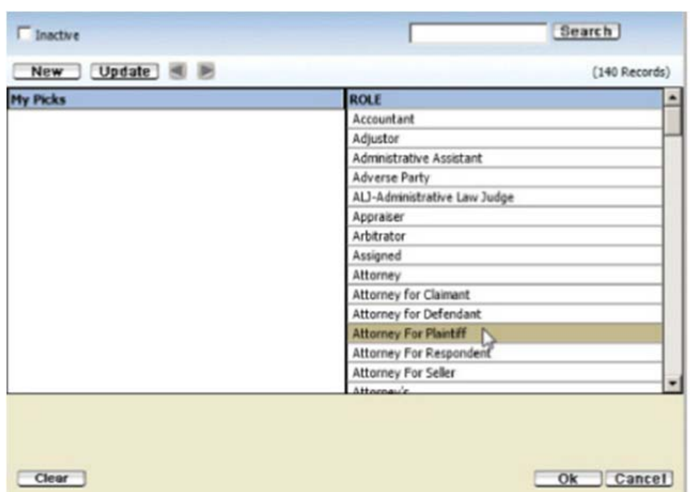


*NOTE: If a Name Card does not exist for this person or company, you can click on the **New** button from Name Card search window or* *close that window and go to the Name Cards action item and click on the* ***Add Name Card*** *icon on the Advanced Search window to display the Add New Name Card window. Refer to "Creating a Company Name Card" on page 55 for this procedure, but for now, we'll select an existing Name Card.*

4. Click **Search** to redisplay the Name Card pick list if it is not still displayed after creating.
5. Enter jones in the Locate field, and then click on the **Search** button to display the names containing Jones. Some databases, such as Oracle, are case-specific. If jones doesn't work, enter Jones.



6. Highlight a name in the list, (e.g. Jones, Bob E Mr.) on the list. Use another name if this one is not on your list.
7. Click **OK** to close the pick list and insert the highlighted name (e.g. Bob Jones) in the Name field.
8. Or, rather than highlighting and clicking **OK**, just double-click the **name** you want to select.
9. Click on the magnifying glass icon next to the **Role** field. The Role pick list is displayed.



10. Highlight a Role from the list and Click **OK** (or double-click selected item) to close the pick list and add the selection to the Role field.
11. Enter data in the remaining fields.
12. Click on the **Save & Close** button to close the window and return to the File Menu display.

Do you see your person listed in the File Related People window?

13. Repeat the previous steps to add additional external file related people as needed.

Managing My Files

NOTE: If you added the wrong person or company by mistake:

- *Highlight the name in the list, click on the* ***Delete*** *hyperlink to remove the File Related Person. Users must have specific security rights to delete File Related People.*
- *Or to modify the file related person data, highlight the name in the list and click on the* ***View Detail*** *hyperlink to display the File Related Person window and make changes as needed.*

14. Click on the **File Related People** folder on the file Navigation Menu display.

NOTE: Jones, Bob E Mr. is now listed in with the users you assigned to the file earlier. The File Related People list contains a complete listing of all the file related people (internal and external).

15. Click on the ***Ima Learning*** hyperlink to return to the file menu display, and leave it open.

Changing the File Status

To record a file's changed status, use the **Add New** hyperlink on the History tab of the File Detail window. Do not use the **Edit File Status** icon next to the current status entry because this will cause the new status to replace the current status. In order to preserve the file's status history, it is best to add the new status and then mark it as the current status.

To change a file's status:

1. Display the File Detail window for the *Ima Learning* file, using either the **View Detail** hyperlink or the File Setup folder on the file menu display.
2. Click on the **Add New** hyperlink on the History tab panel. The File Status pop-up window is displayed.
3. Select a file status from the **File Status** pick list, select a date, and click **OK** to close the window.

Notice the newly added status is listed below the original file status, and the new file status now is marked as the current status.

Using Private Files

Create a private file or convert an existing file to private if you do not want the file to register in some reports. Private files do not display in the file list--even when the list is filtered to display **All** file types. Private files only display when the file list is filtered to display **Private** file types.

In most cases, a private file is used to secure sensitive matters or perhaps store your personal information – information that nobody but you or selected users need to see. For example, some offices use private files for personnel issues or confidential matters. Or, your private file could contain all your personal appointments and contact information – for doctors', haircuts, little league schedules, school meetings, whatever.

Although private files can be password protected, we suggest you only assign a password if needed. If you forget the password, it cannot be reset! Not even the system administrator knows anyone's private file password.

Creating a Private File

A private file is created the same way as any other file is created, except you select Private from the Type field's drop-down list. You can click on the Password tab to specify a password (but read warning above).

To create a private file:

1. Click on the **Add New** hyperlink in the top-center of the My Files window.
   a. The Add New File window is displayed; the fields denoted by a red asterisk (*) require data entry.
2. From the General Information section, enter a file name in the File Name field. For example, My First File.
3. Select Private from the **Type** field's drop-down list.
   For a description of the other fields, see "Creating a File" on page 41.
4. Enter a menu type, using the magnifying glass icon next to the **Menu** field.
5. Click on the **Save** button to close the window and return to your previous view.

Finding and Opening a Private File

1. From the Advanced Search section of the file list, select **Private** from the Type field, select File Name from the **Search Field** drop-down list, and enter My First File.
2. Press the **Search** button.
   a. Do you see your file? Remember, Private files will not display in any view but the Private file list view, which protects its data from showing up in various file reports. Searching for ALL file types will NOT display Private files.
   b. A list of private files is displayed. This list displays only the private files that you created or that another user gave you access to -- either as an assigned user or a user with access rights.
3. Click on the **File Home** icon next to the listing for My First File. If a password was assigned the Private File Validation pop-up window would be displayed.
4. We did not specify a password, so the file menu is displayed.

Using the Advanced Search Settings

NOTE: The procedures for using Advanced Search are the same for every list view (users, Name Cards, To- Do's, calendars, phone logs, etc.).

The Advanced Search window allows you to filter your list views for any list, (such as files, Name Cards, documents, To-Do's, etc.) according to your specified search criteria. For example, for files you can search by type, status, date, field name (such as file name or location), and user, among other criterion.

The Advanced Search feature allows you to save multiple search criteria. For example, if you manage the files of multiple users, you might want to create search criteria for each user.

Additionally, you can designate one saved criteria as your Default Search criteria. *Legal Files* recommends you set Default Search criteria for every list view (files, calendar, To-Do's and so on). In doing so, *Legal Files* will automatically display that list of items every time you select that view.

Without designated Default Search criteria, every time you display the list view, you will have to enter your search criteria and press the Search button before any items appear in the list. Setting Default Search criteria saves you steps. You still can modify the results from your default search as needed, but the next time you exit and return to that view, *Legal Files* will display those items for your saved default search. If you find yourself repeatedly making the same modifications to your default search results, consider modifying your settings and save that as your Default Search.

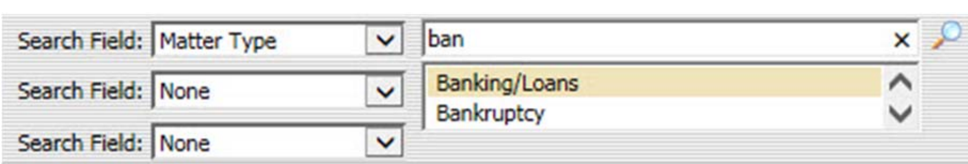
When searching for Action items, if a user does not have access to a private file, those items will not be displayed in the results.

Establishing Default Search Criteria

Use this procedure to specify your default search criteria. Then each time the list view is selected, it will display the items according to your specified default criteria.

1. From the Advanced Search window, specify the search settings you want displayed as your 'default' search method when you select the Advanced File Search.
2. Selecting a value in a **Search Field** gives you a pick list choice or an entry field. Pick lists will display a magnifying glass icon; click it to choose a single value from the list. Entry fields let you enter freeform text to search by.
3. Many entry **Search Fields** display a second field offering another level of filtering on the value to be searched by. These include:

- **Exact** – Searches on a precise value; spelling-, punctuation- and capitalization-sensitive.
- **Contains** (Default value) – Searches on any 3 characters contained (in order) anywhere in the field being searched.
- **Sounds Like** – Searches on similar-sounding values.
- **Begins With** – Searches on values at the start of chosen search field.

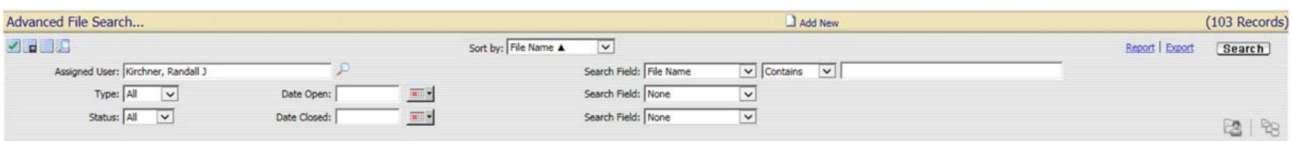


Managing My Files

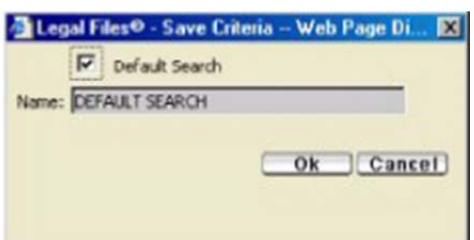
Some Advanced Search picklists offer "type ahead" behavior. If you know the values stored in the list, type the first 3 characters, and Legal Files will display all matching values. Select the one you need!

- Other entry **Search Fields** do not display a Contains field, but will allow you to recreate a "contains' search. Simply surround the search term with the percent symbol (%). This is similar to using quotation marks (") when Googling.
- Another way to use the % symbol, is as a wildcard. For example, you can search on "Sm%th" if the name might be spelled "Smith," "Smythe", etc.

- For example, set the Advanced Search fields to list all of Randall's open files by file name.



4. Click on the Save Criteria icon in the upper-left side of the Advanced Search window.



The Save Criteria window is displayed.

5. Select the **Default Search** box to designate these settings as your default search criteria.
6. The name, DEFAULT SEARCH, is automatically designated as the save criteria name.
7. Click on the **OK** button to save your criteria and close the window.
8. Go to another *Legal Files* view (e.g., My Day).
9. Return back to the Advanced File Search by selecting **My Files.**

Do you see your files listed according to your specified Default Search criteria?

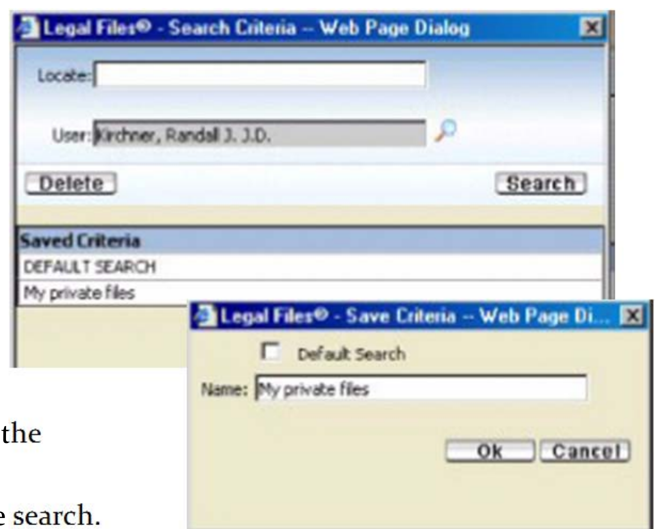
Setting and Saving Additional Search Criteria

Use this procedure to specify and use search criteria in addition to the default search criteria. To perform the search you will need to select which search criterion to execute.

1. From the Advanced Search window, specify the search settings you want displayed.
   a. For example, set the Advanced Search fields to list all Private files, or all Sally's open files by file name, or whatever.
2. Click on the **Save Criteria** icon in the upper-left side of the Advanced Search window. The Save Criteria window is displayed.
3. Enter the name of your search criteria in the **Name** field. Be as descriptive as possible to make it easy to quickly distinguish one saved criteria from another.
4. Click on the **OK** button to save your criteria and close the window. Repeat these steps as needed to create as many saved search criteria as you need.

Selecting a Saved Search Criteria

Once you have created search criteria in addition to your default criteria, you select the criteria as follows:



1. From the Advanced Search window, click on the **Select Criteria** icon. The Search Criteria window is displayed.
2. Select a saved search from the list.
3. Click on the **OK** button to close the Search Criteria window and display those criteria in the Advanced Search window.
4. Click on the **Search** button to implement the search.

Clearing Search Criteria

1. From the Advanced Search window, click on the **Clear Criteria** icon to clear your specified search criteria.
2. Enter whatever new search criteria you want, and don't forget to click on the **Save Criteria** icon if you want to be able to select these criteria again.

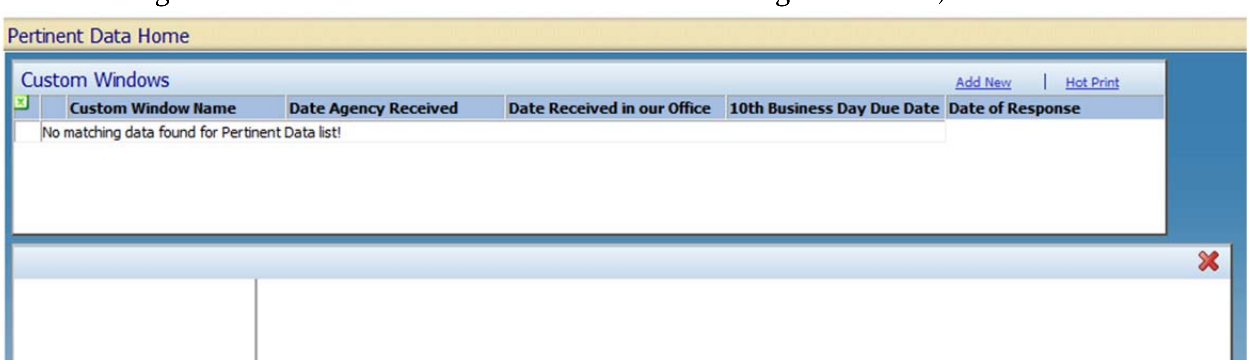
Using Custom Windows

Custom Windows are *Legal Files*' method for capturing data that is <u>not</u> already available on the standard file windows, Name Cards or Actions (Calendars, To-Do's, etc.). Nearly any type of data can be captured, and each customer's *Legal Files* administrators can create the Custom Windows required.

The most commonly used Custom Windows are those that appear on the Navigation Menu within a file. The entry will appear no differently than any other program on the menu, but when opened, the tan bar will display the label "(Name of Custom Window) Home" and the window directly below will be labeled "Custom Windows."

Adding and Navigating Custom Windows

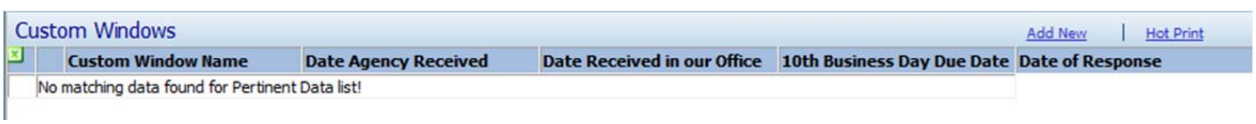
After clicking on the name of a **Custom Window** in the Navigation Menu, Users should see:



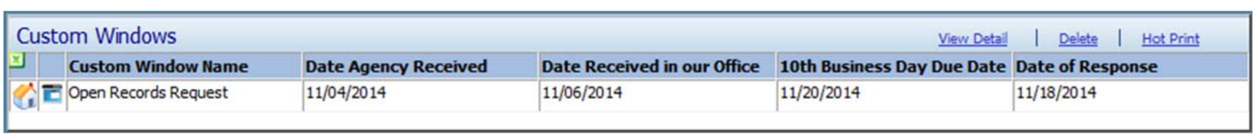
- A tan bar with "(Name of Custom Window) Home" showing at far left.
- Below the tan bar:
  - o A short, wide window labeled "Custom Windows" at left in the blue header, with hyperlinks labeled **Add New** and **Hot Print** at right.
  - o In the same window, five columns whose labels will differ in each Custom Window.
  - o A second window – tall and wide – displays below the first, with two columns.
  - o These windows will be blank if no data has yet been saved to the Custom Window. If data has been saved, both windows will display data.

Many Custom Window windows/screens will have a small Excel icon at the top of the first column. Clicking this **Export to Excel** icon will export the Custom Window data displayed, where you can format, sort and print the data.

Managing the upper window



- **Add New** hyperlink Add New opens the Custom Window detail window, so that data may be entered into the Custom Window and saved to the file.

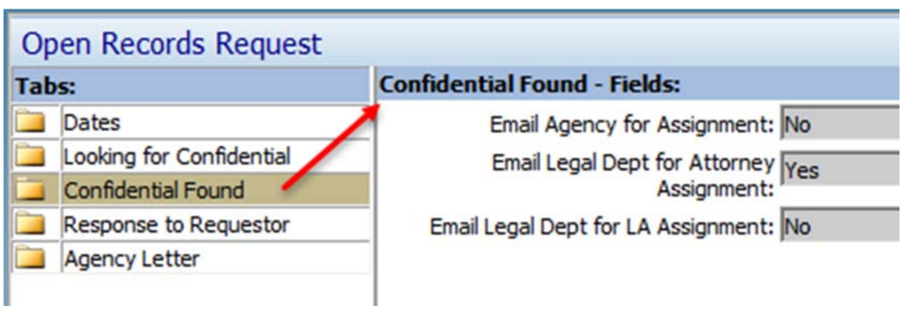


- Once data is saved to the Custom Window, a single row is added to the upper window and the **Add New** link is removed (see image above). To re-open the detail window, users can:
  - o Click once on the **View Detail** hyperlink,
  - o Click once on the **Custom Window Detail** icon in the second column , or
  - o Double-click anywhere on the entry row other than icons (i.e., dates)
- **Delete** hyperlink removes a saved Custom Window from a file. Users must have specific security rights to delete Custom Windows.
- **Hot Print** hyperlink displays the Custom Window in an HTML page, which may be printed on your printer.

NOTE: Click on the Microsoft Excel icon in the header row of the first column of the upper window to export the Custom Window data into Excel, where users can sort data and format the output to meet specific reporting needs.

Managing the lower window

The lower window displays the Custom Window data, but in a read-only view. Data may not be edited from this view.



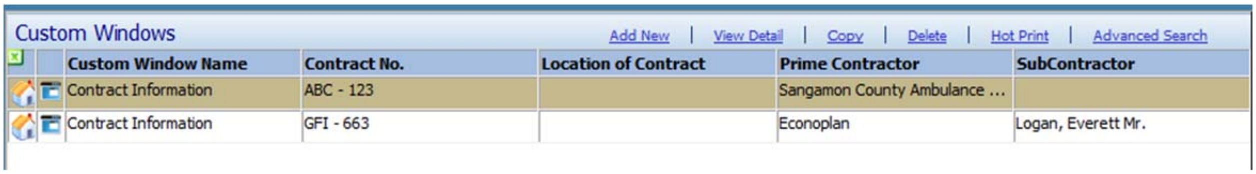
- The left column displays the names of the Tabs contained within the Custom Window.
- The right column displays the data fields contained on a Tab. When first opened, this window will display the fields contained on the first tab.
- To display data from any other tab, click on that tab in the left column. The right column header now reflects that tab name, and the fields below are those saved on that tab.
- Double-click any tab in the left column to open the Custom Window detail window.

Selection (Multiple Instance) Custom Windows

Custom Windows can be saved once to a file, or they can be saved many times. If users can select a Custom Window multiple times on a single file, these are called Selection Custom Windows. *Legal Files* administrators control whether a Custom Window is a single-instance or selection window.

Selection Custom Windows operate the same way as single-instance windows, with the following additions:

Managing the upper window

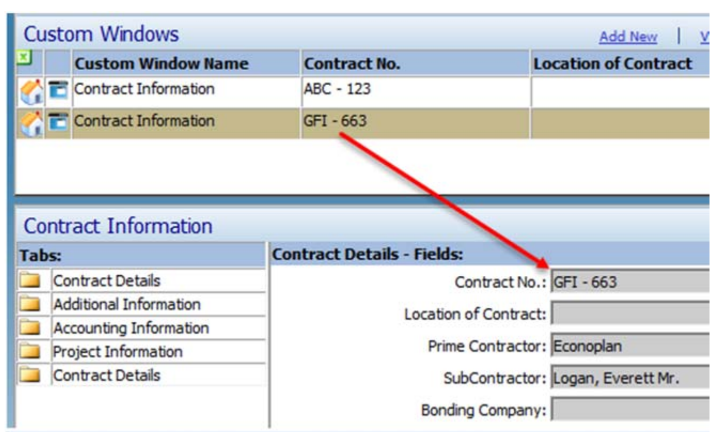


- In a Selection Custom Window, the **Add New** hyperlink remains in the upper window even after the first Custom Window is saved to a file (see image above). To add additional instances of the Custom Window, click this hyperlink.
- **Copy** duplicates a selected Custom Window (click once on a row to highlight it, as in the first row of the image above), which is immediately opened for editing.
- **Advanced Search** displays the Custom Window Advanced Search functionality, which allows users to search across all Selection Custom Windows in this file. See the *Custom Window Advanced Search* section below for more information.

Use the Copy feature when saving multiple Custom Windows with only minor differences. For example, a renewing contract often retains many elements of the original contract; you can simply copy the first Custom Window (original contract) and modify only those fields that have changed!

Managing the lower window

- If multiple Custom Windows are saved in the upper window, by default the first window's tabs/data are displayed in the lower window. To display data from another Custom Window, click on another entry in the upper window.



Custom Windows Advanced Search

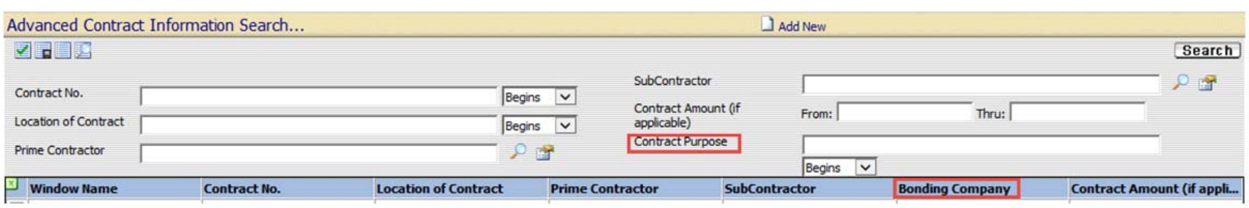
Advanced Search capabilities on Custom Windows can be enabled in each user's preferences. This will automatically display Custom Window Advanced Search on every Custom Window. To enable:

1. Click the **Preferences** hyperlink in the upper right corner of *Legal Files*. 

2. Click on the **Actions** tab
3. Set the **Use CW Advanced Search** field to "Yes."
4. Click the **Save** button, then click the **Log Off** hyperlink. Log back into *Legal Files*.

Now, when the user visits any Custom Window in *Legal Files*, an Advanced Search section appears. The name appearing in the tan bar above the gray area will always be named:
"Advanced (Name of Custom Window) Search …"

NOTE: If Custom Window Advanced Search is not enabled through Preferences, users may click on the ***Advanced Search*** *hyperlink displayed in the upper window on each Selection Custom Window home page to activate the advanced search function as needed.*



- The maximum of six (6) fields displaying in the Advanced Search area are controlled by *Legal Files* administrators, and can include any six fields in a Custom Window. Use these fields to search for values across all instances of this Custom Window saved to a file.
- The column headers in the search results display may or may not match the search fields (i.e., compare Contract Purpose .vs Bonding Company fields in the image above), and are also controlled by *Legal Files* administrators.
- Use the Advanced Search icons  to:
  - Save a default search for this Custom Window.
  - Set/retrieve saved searches for this Custom Window.
  - Recall your Last Search in this Custom Window.

Editing Custom Windows

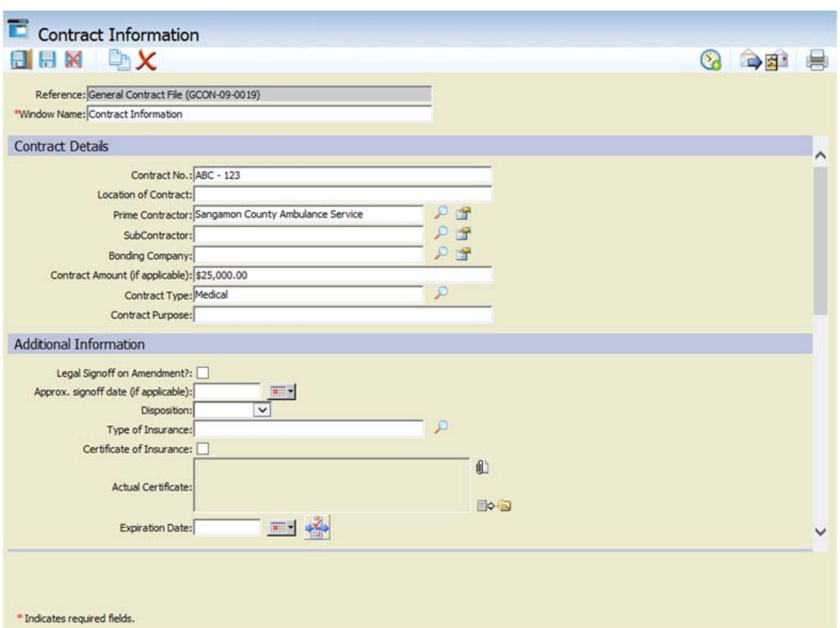
Opening the Custom Window detail window allows users to enter and edit information in a Custom Window. *Legal Files* administrators can choose one of three formats for displaying their Custom Window detail windows. Each of the display formats allows users to:

- Route a Custom Window and see its history via the **Route Item / Route History** icons. 
- Enter a Time Slip via the **Create Time Slip** icon. 
- **Print** the Custom Window. 

Comparing the Custom Window Display Formats

Scrolling Format

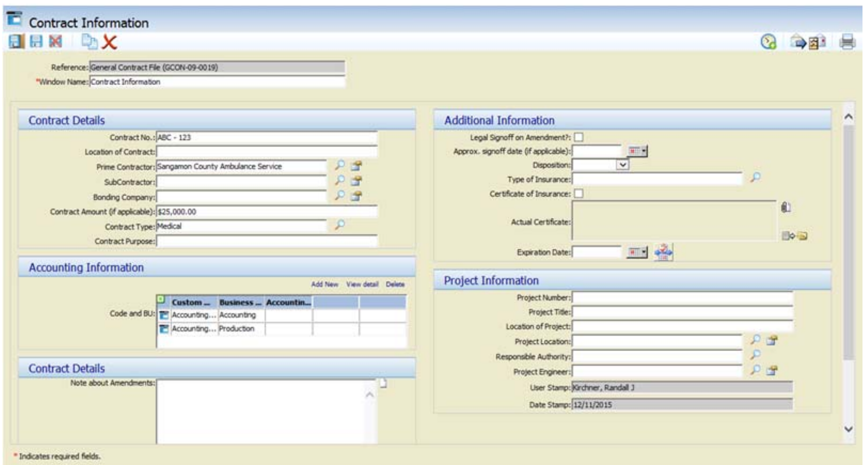
- Page is displayed in one column.
- Each Section/Tab appears as a blue/gray bar across the page with data on each tab appearing below.
- Scroll bar appears at right if more sections/tabs appear below the current window dimensions.



Managing My Files

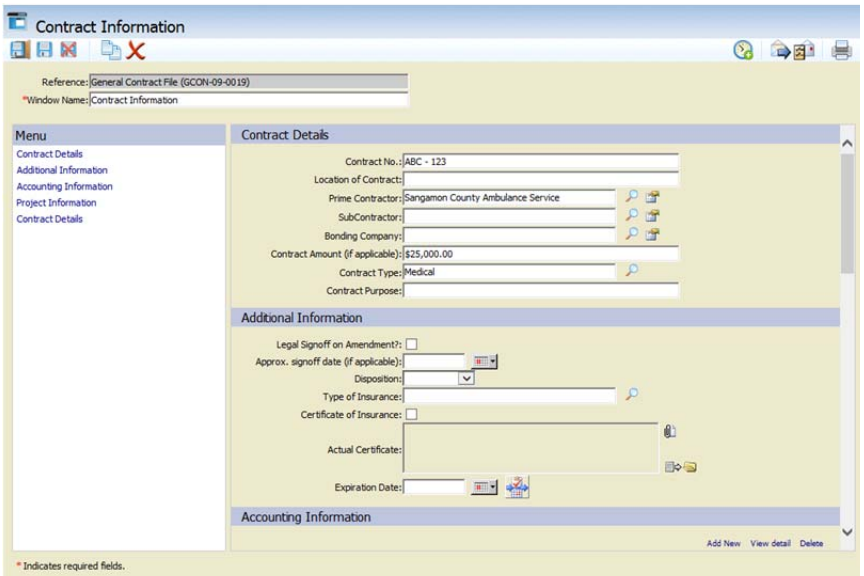
Columns format

- Page is divided into two columns.
- Sections/Tabs are distributed on the page in the following format:
    - o Tab 1 Tab 2
    - o Tab 3 Tab 4
- Scroll bar at right is functional, and can also be used to navigate down the window.



Menu Format

- Page is divided into two columns.
- All Sections/Tabs are listed in the Menu column, with the first tabs displaying in the right column.
- Clicking on any Section/Tab name in the Menu column will "jump" down the right column until that Tab displays at the top of the right column.
- Scroll bar at right is functional, and can also be used to navigate down the window.
- The Menu format is especially useful for navigating Custom Windows that have many tabs or sections.



Types of Custom Windows

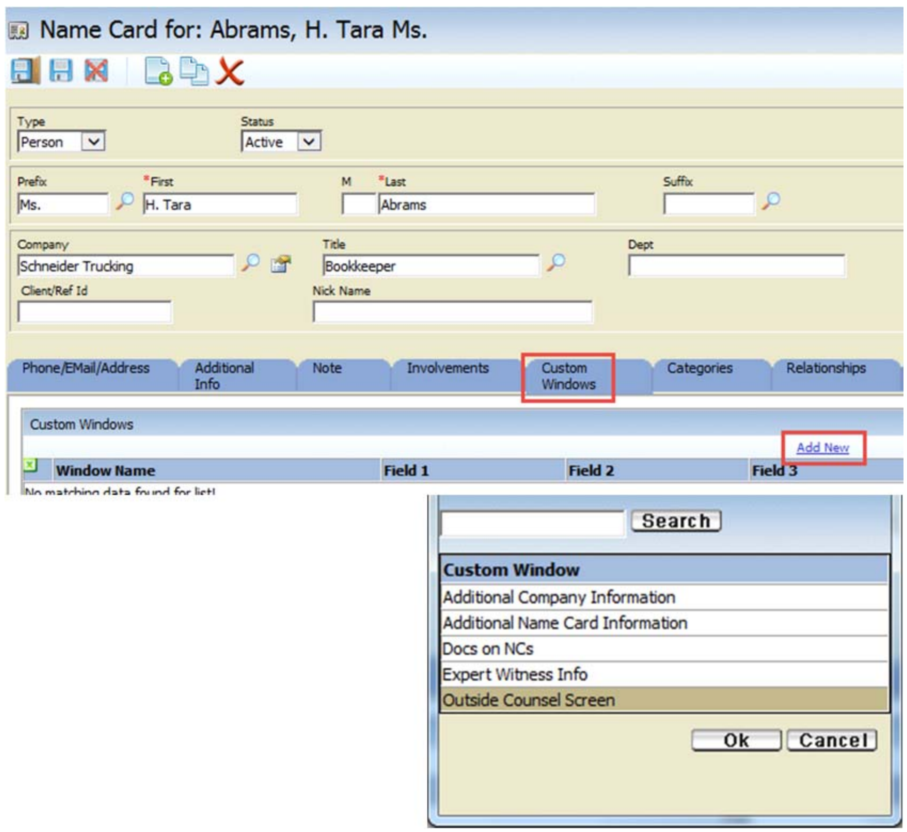
Legal Files administrators can create Custom Windows to be used in several areas of *Legal Files*, such as Name Cards and Calendars. These Custom Windows function similarly to file Custom Windows, except they offer no Advanced Search or reporting capability, and they utilize the Scrolling Display Format only.

Custom Windows may be created for the following areas of *Legal Files*:

- Calendar
- Contract
- Document
- Embedded Custom Window
- File
- File Related People
- Mail Log
- Name Card
- Phone Log
- Time & Expense
- To Do

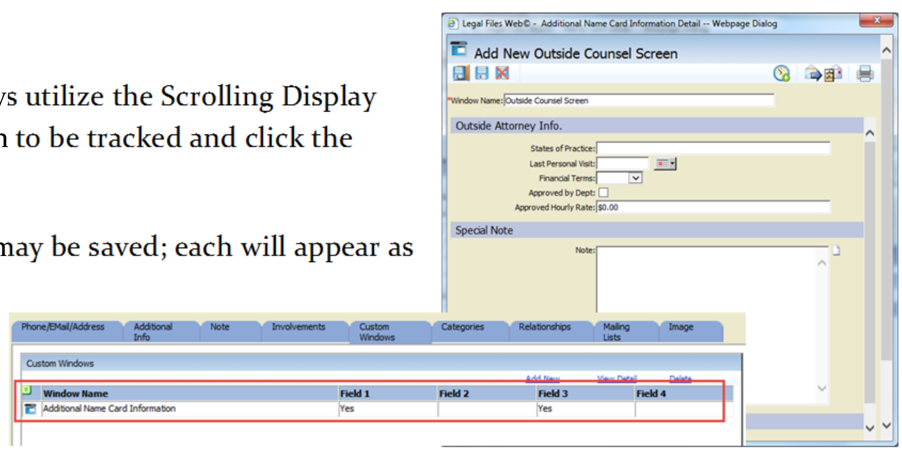
A Name Card Custom Window captures information specific to individuals that is not included in Legal Files' Name Cards. Likewise, a Calendar Custom Window captures supplementary data you need to track on calendar entries. Whatever you need to capture, a Custom Window can save it!

On a Name Card detail window, click on the **Custom Windows** tab, then the **Add New** hyperlink. A window will open displaying all Custom Windows for Name Cards created by *Legal Files* administrators. Open a Custom Window by double clicking on its name or click once to highlight it and then click the **OK** button.

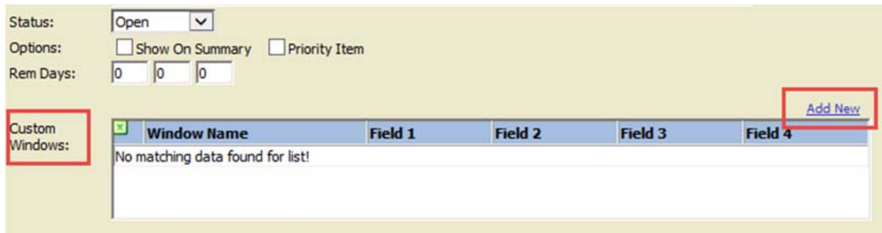


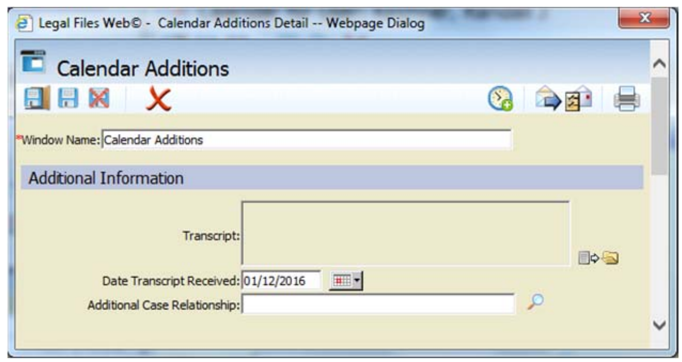
All non-file Custom Windows utilize the Scrolling Display Format. Add the information to be tracked and click the Save & Close icon.

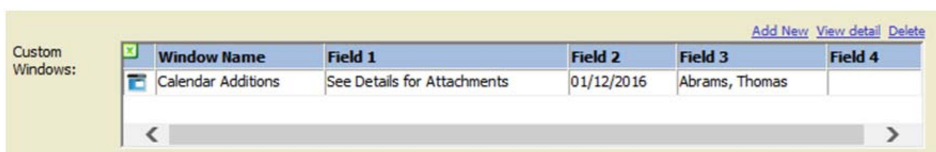
Multiple Custom Windows may be saved; each will appear as a row on the Custom Windows tab.



On Action Items (i.e., Calendars), the Custom Windows area appears near the bottom of the detail window, with the **Add New** hyper link at right. As on Name Cards, clicking this hyperlink displays the Custom Windows available. Select one, enter data, **Save & Close** the Custom Window, and it will appear in the Custom Windows area on the Calendar.







Manage Name Cards

Concept

The Manage Name Cards view lists all the Name Cards (i.e., contacts) in the *Legal Files* database. From here you can manage all aspects of the Name Cards -- adding, updating, deleting, referencing, printing, etc.

Name cards store basic information about every person and company associated with your files. Every client, attorney, witness, and other file-related person must have a Name Card in order for them to be used in or referenced to a file.

Name Cards can also function as your office address book or contacts list. You can create Name cards for any person or company your office does business with, regardless whether they are file-related.

The information on each Name Card is accessible to all *Legal Files* users. Whenever a change is made to a Name Card, it is automatically updated in every *Legal Files* window where the Name Card is referenced.

Chapter Lesson

In this lesson you will learn how to search for a Name Card; how to view, update, and save Name Cards; and how to create Person, Company, and Business Person Name Cards.

Managing Name Cards

Use **Manage Name Cards** view to manage the Name Card data of every person and company in *Legal Files*. You can do the following from Manage Name Cards & Advanced Name Card Search:

- Create and manage all aspects of a Name Card.
- Establish search criteria to filter your Name Card lists, including the ability to specify default search criteria that determines how the file list displays upon opening the Manage Name Cards view.

Common Button Functions on the Name Card Detail Window

The following program buttons are available from every Name Card Detail window:

- **Save & Close.** Click this button to save your date and close the window.
- **Save**. Click on this button to save your data and keep the window open.
- **Cancel**. Click on this button to close the window without saving any changes to it.
- **New**. Click on this button to open a new Name Card Detail window. This new window is not based on the data of the existing window; it merely provides another location from which to create a new Name Card.
- **Copy**. Click on this button to copy the open Name Card.
- **Delete**. Click on this button to delete the existing Name Card.
- **Print**. Click on this button to print the Name Card detail window.
- **Links**. Click on this button to display the Web Links pick list, from which you can display any web pages associated with this detail window.

Displaying and Navigating the Manage Name Cards View

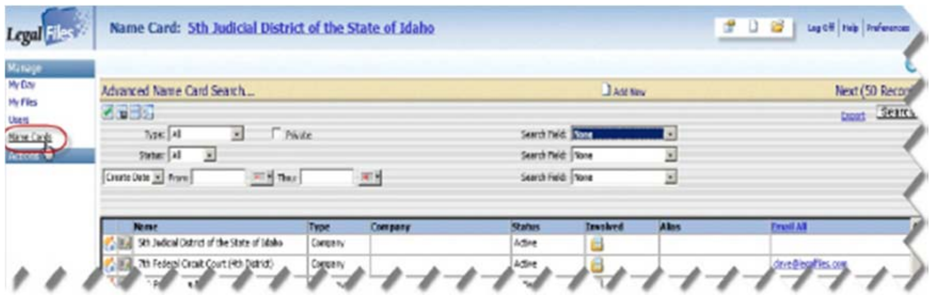
Use this section to orient yourself to the Manage Name Cards view before moving to the specifics of creating and managing specific Name Cards.

1. Click on the **Name Cards** hyperlink on the Manage menu, of the main window, to display the Name Card List window.

NOTE: The Name Card field at the top of the Legal Files window displays the name of the first person or company listed in the Advanced Name Card Search window.

Manage Name Cards

The interior window displays the **Advanced Search** fields, which default to listing All **Types** of Name Cards of All statuses (inactive and active).



The table format of the Name Card list allows you to see and access some name-card data, without opening the Name Card.

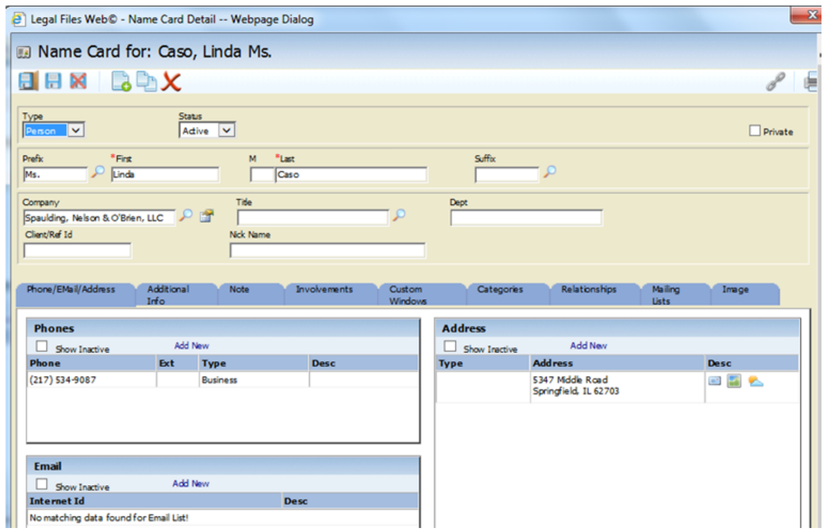
Users can re-order the columns by clicking on a column heading and move it to its preferred location. The new column order will be retained for that user on that machine until changed.

2. Single-click anywhere in the list (anywhere but on an icon or hyperlink that is; clicking on an icon or hyperlink will open that item).

NOTE: Although the list view does not change, the name corresponding to the one you selected is now listed in the Name Card: hyperlink at the top of the Legal Files window.

3. Click on the name listed in the **Name Card:** hyperlink at the top of the window, or click on the **Home** icon on the left side Advanced Name Card Search window to display the Home view for that Name Card. This Name Card Home view displays the General Information, Custom Windows (or Additional Info if no Custom Windows exist), and People or Involvements panels for the Name Card.

4. Click on the **Name Cards** hyperlink on the Manage Menu, left of the main window, to return to the list of Name Cards.



5. From the Name Cards list view, display the Name Card detail window in one of the following ways:
   - Click on the **Name Card Detail** icon.
   - Highlight a name, and then click on the **View Detail** hyperlink at the top of the Advanced Name and Search window.
   - Double-click on a name in the Name Card list.
6. **Close** the detail window to return to the Name Cards list view.
7. From the Name Card list, click on a **Company** hyperlink to display that company's Name Card detail window, an **Email** hyperlink to send an Email, or on the **Involvements** icon to view the Name Card's File involvements.

Creating a Company Name Card

Legal Files recognizes three types of Name Cards: Person, Company, and Business Person. The fields are identical for Person and Business Person Name Cards; the only difference is that once a Person Name Card has been associated with a Company Name Card it is then identified as a Business Person.

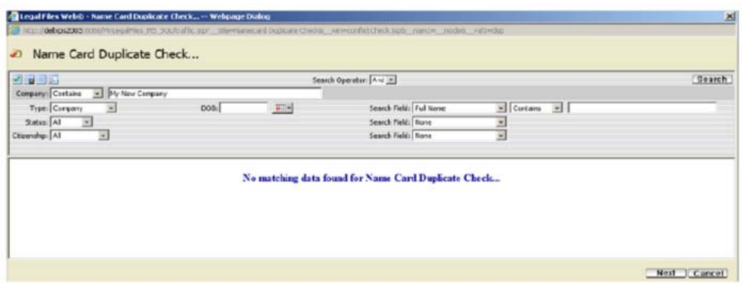
All three types of Name Cards can be associated with a file. Once associated with a file, those files then show under Involvements on the Name Card.

You should create only one Name Card per person or company; duplicate Name Cards diminish the integrity of your database. In order to help you maintain your database integrity, *Legal Files* can be set by your system administrator to automatically display the Name Card Duplicate Check window every time you begin to create a new Name Card, allowing you to easily see if the Name Card you intend to create already exists.

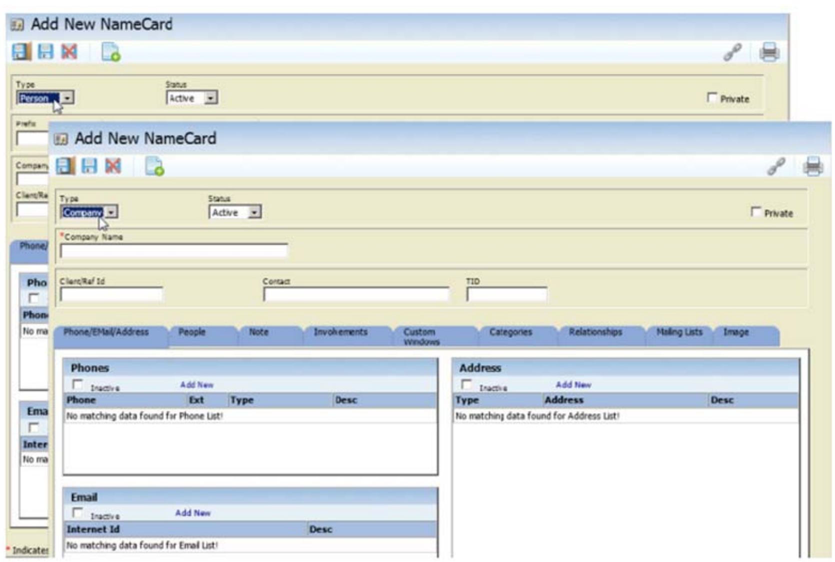
Create the Company Name Card first. Next create the person Name Cards that are related to the company because you can immediately associate each person with the company and have the option to associate/copy the company Name Card's phone and address information to the linked person's Name Card.

To create a company Name Card:

1. From the Name Card list, click on the **Add New** hyperlink at the top of the Advanced Search window. Name Card Duplicate Check window displays (if turned 'on' in System Configuration).



- Select Company from the **Type** drop-down list to display the Company field.
- Type My Company in the Company field.
- Click on the **Search** button. No matching data is found.
- Click the **Next** button to display the Add New Name Card window.



*NOTE: The **Type** field defaults to Person.*

2. Select Company from the **Type** drop-down list. The fields have

changed accordingly. The fields for a Person or a Business Person are identical; a Business Person is just a person associated with a Company, but the fields of a Company Name Card are different.

3. Type My New Company in the **Company** field.
4. Leave the **Client/Ref ID** and **Contact** fields blank.

Adding Phone Information

5. Click on the **Add New** hyperlink in the Phones section of the Phone/Email/Address tab to display the Add New Phone for: New Name Card window.

- Leave the **Format** field set to United States.

6. *Legal Files* automatically formats your phone number entry according to your *Legal Files* system configuration. Use the drop-down list to select Canada or Free Form. Use Free Form to supply your own formatting for a phone number other than the U.S. or Canada.

- Type 2175556345 in the **Phone #** field, which is a required field. *Legal Files* will format the numbers according to your chosen format upon saving this window.
- Use the lookup icon next to the **Type** field, and select Office from the **Phone Type** pick list.
- Enter Call 8am-5pm CST, M-F in the **Comments** field.

7. Use this field to enter any helpful notes about the phone number. For example, if you enter a cell phone number and a home number, you might make a note as to which number to call first. Both the **Type** and **Comment** field data are visible at a glance.

- Leave the **Status** field set to Active.
- The **Status** field allows you to make some phone numbers inactive, rather than deleting them. For example, if you have a winter and summer home phone number, you can enter both numbers as Home numbers, but inactivate one or the other as appropriate.
- Click on the **Save & Close** button to close the window and save your settings.

Notice that the phone number is properly formatted and your comments are displayed in the Desc. column.

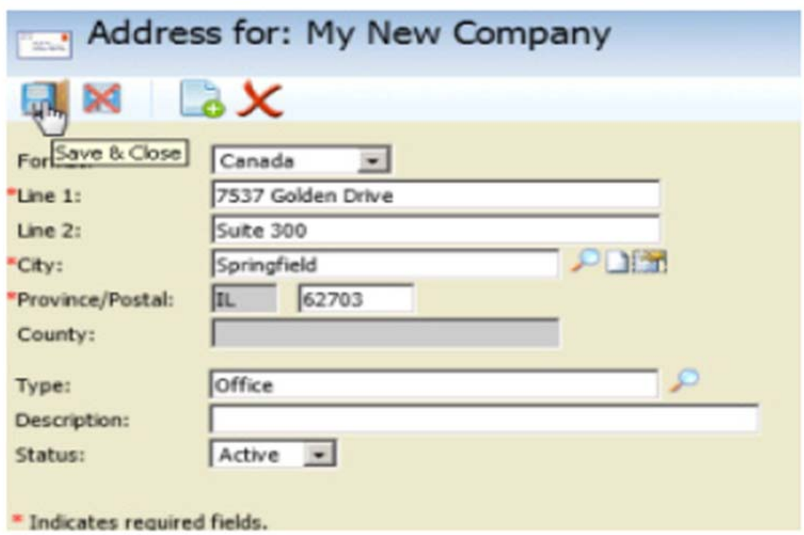
Manage Name Cards

You can enter as many additional phone numbers as you need. We will just enter the one for now.

Adding Address Information

8. Click on the **Add New** hyperlink of the Address section to display the Add New Address for: New Name Card window.

- Leave the **Format** field set to United States. As with the Add New Phones window, *Legal Files* will automatically format your address according to your *Legal Files* system configuration; Canada and Free Form are the other choices.
- Type 7537 Golden Drive in the **Line 1** field, which is a required field.
- Type Suite 300 in the **Line 2** field.
- Use the lookup icon next to the **City** field, and select Springfield, IL 62703 from the City pick list.



*NOTE: The City, State/Zip, and County fields are automatically filled in because all the information was included in the **City** pick list. You also can manually enter in a new city, two-digit state code, zip code and county by using the **New City** icon.*

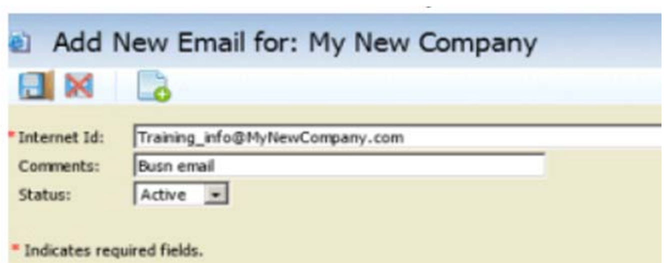
- Use the lookup icon next to the **Type** field, and select Office from the **Address Type** pick list.
- Leave the **Description** field blank and the **Status** field set to Active.
- The **Description** field can be useful for entering any notes about the address, as needed. The **Status** field allows you to make some addresses inactive, rather than deleting them.
- Click on the **Save & Close** button to close the window and save your settings.

NOTE: The address now is properly formatted. ***Envelope*** *,* ***Map*** *and* ***Weather*** *icons display in the Desc. column. Use these to print mailing envelopes, and to view map and weather information corresponding to the address. If we had entered descriptive comments, they would be listed beneath these icons.*

You can enter as many additional addresses as you need. We will just enter the one for now.

Adding Email Information

8. Click on the **Add New** hyperlink of the Email section to display the Add New Email for: New Name Card window.



- Type Training Info@MyNewCompany.com in the **Internet ID** field, which is a required field.
- Type Busn. Email in **Comments** field and leave the Status field set to Active.
- The **Comments** field can be useful for entering any notes about the Email address, as needed. The **Status** field allows you to make some Email addresses inactive, rather than deleting them.
- Click on the **Save & Close** button to save your settings and close the window. If we had entered descriptive comments, they would be listed in the **Desc** field.

You can enter as many additional Email addresses as you need. We will just enter the one for now.

NOTE: On Company Name Cards, the ***Internet ID*** *field is used to store the company website address, if desired.*

9. Click on the **Note** tab to enter any helpful notes about the company. For example, you could use it to include descriptive information to help you place the nature of the company.

In theory, any Name Card can be related to many different files. Therefore, never add any file-related information to a Name Card Note field. This Note should only contain information about the person or company (i.e., needs interpreter, etc.).

10. Click on the **Save & Close** button to save changes and close the window or the **Save** button to save changes and keep the window open, in order to add additional information.

Finding a Name Card

Now that you created the My New Company Name Card, it's time to learn how to find and open it from the Name Card list. One way to find your Name Card is to use the scroll bar to the right of the Name Card list. That method works fine if your Name Card begins with a number or an A or B -- or if you have very few Name Cards entered in your database.

In most cases, however, the scroll method can prove slow and unwieldy. Therefore, we'll use the Advanced Search method that we learned about in “Using the Advanced Search Settings” on page 56 of “Managing My Files.”

To find a Name Card using the Advanced Name Card Search window

The Advanced Name Card Search allows you to use a variety of criteria to narrow or broaden the search you wish to execute. It also allows you to name and save search criteria settings so you can use those same searches at a later time.

Advanced Name Card Search criterion filters:

Type - Specify which Type of name cards search results must match.

Status - Specify whether the name card(s) to search are in Active or Inactive status.

Create Date & DOB - Look for name cards created on/before/after a certain date, people who were born on/before/after a certain date, or within a date range using both fields.

Search field(s) - You can use up to three additional Search Fields. The drop down list for each contains the same fields from which to choose.

Sort By: Sort search results by a variety of factors, each of which can be sorted forwards/backwards, and can be retained in default searches.

NOTE: If field name(s) have been changed in Custom Prompts that name change will be shown in the names shown on this list.

For some search fields the qualifiers (Exact, Contains, Sounds Like, or Begins With) are used in conjunction with the search criterion selected. For example, you might search for Names that Begins With S or Names that Contain Smith somewhere in the Name field.

Filters Used with Alias, Company Name, Contact, Department, First Name, Middle Initial, Last Name, Full Name, License, Notes, Ref ID, ID#, TID, and Phone Number

Exact Use to match exactly what is entered in the search field.

Contains Use this to match something that contains what is entered in the beginning, middle, or end.

Sounds Like Use this when looking for a match that would sound similar but might have a different spelling.

Begins With Use this when looking for a match that begins with what is entered.

- **Alias**: Enter all or a portion of the Alias.
- **Category:** Choose from the Category pick list.
- **Company:** Choose from the Company pick list.
- **Company Name:** Enter all or a portion of the Company Name.
- **Contact:** Enter all or a portion of the Contact.
- **Department:** Enter all or a portion of the Department.
- **First Name:** Enter all or a portion of the First Name.
- **Middle Initial:** Enter all or a portion of the Middle Initial.
- **Last Name:** Enter all or a portion of the Last Name.

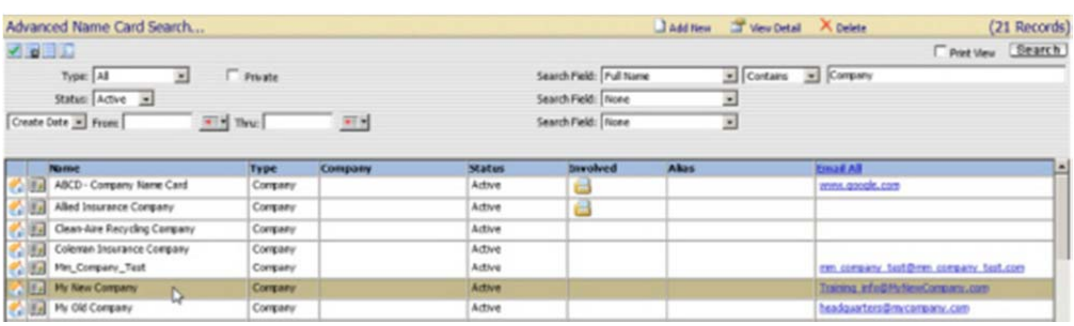
Manage Name Cards

- **Full Name:** Enter all or a portion of the Full Name.
- **License:** Enter all or a portion of the License.
- **Notes**: Enter all or a portion of the Notes.
- **Ref ID:** Enter all or a portion of the Ref ID.
- **Role (Assigned User):** Choose a role for an a user that has been Assigned to the file(s)
- **Role (Involvement):** Choose a role for a person or company that has been related to the file(s).
- **File Related Person Type:** Choose from the File Related Person Type pick list.
- **ID #:** Enter all or a portion of the ID #.
- **TID:** Enter all or a portion of the TID.
- **Title:** Choose from the Title pick list.
- **Phone Number:** Enter all or a portion of the Phone Number.
- **Email Address:** Enter all or a portion of the Email Address.

EXAMPLE

Set the default search settings to Full Name / Contains . Using Full Name will search all three Name Card types (Company, Person and Business Person) using the Company Name field and/or First & Last name fields for Person and Business Person Name Cards

1. From the Advanced Name Card Search window, select Full Name from the first **Search Field** drop-down list, then select **Contains** from the drop-down field next to the **Full Name** field. Enter all or a portion of My New Company in the blank field beside it.
2. Click on the **Search** button. Do you see your Name Card listed?



3. Double-click on a name in the Name Card list or

- Single click on the **Name Card Detail** icon to display the Name Card detail window, from which you can add or change Name Card data. This is the most direct way.
- Single click on the **Name Card Home** icon to display the Name Card home window, and then click on the **View Detail** hyperlink to display the Name Card detail window.
- If you have your Name Card highlighted, click on the **Name Card: My New Company** hyperlink at the top of the *Legal Files* window to display the Name Card home window, then click on the **View Detail** hyperlink to display the Name Card detail window.

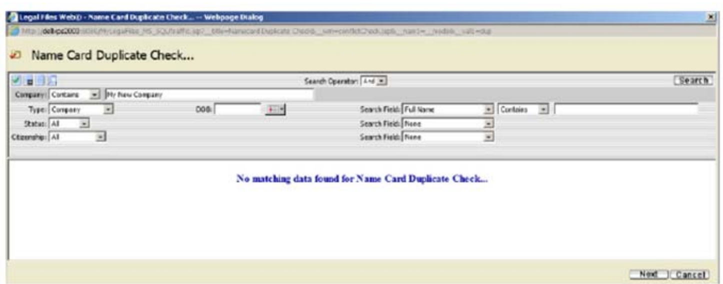
4. Close the detail window. Although there is more data to enter for the My Company Name Card, we will create a person Name Card first.

Creating a Person Name Card

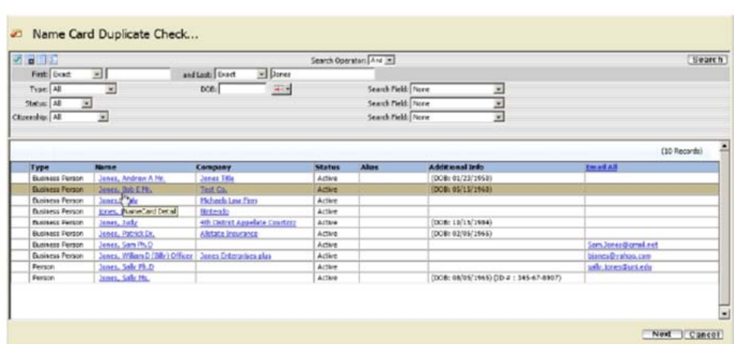
Use this procedure to begin creating a person Name Card. Because you will reference this Name Card to a company Name Card, this person Name Card will end up as a business person Name Card. The fields on a person and business person Name Card are otherwise identical.

To create a person Name Card:

1. Click on the **Add New** hyperlink at the top of the Advanced Search window.



The Name Card Duplicate Check window displays (if turned 'on' in System Configuration).

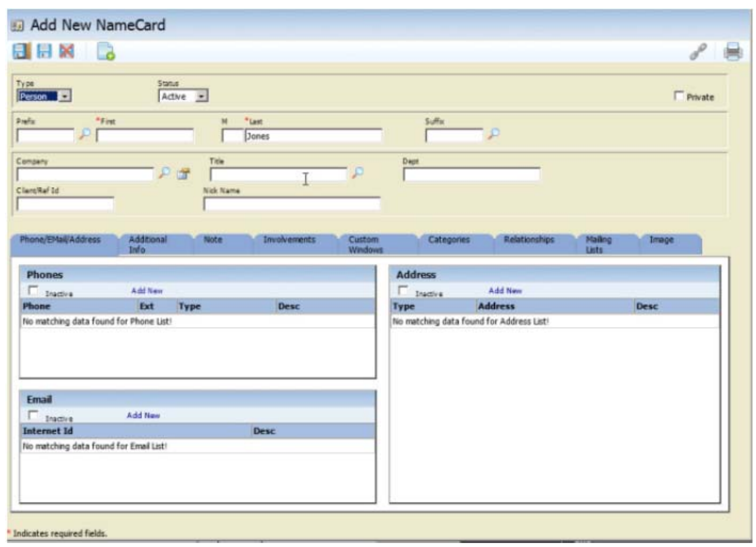


It defaults to All for **Type** of Name Cards (Company, Person, & Business Person) and uses the **First Name** and **Last Name** as search fields. In this manner you can use First or Last or a combination of the two to search for either a Person or Business Person Name Card. These fields will not search Company Name Cards.

2. Type Jones in the **Last Name** field next to search for duplicate Person or Business Person Name Cards with the last name of Jones.
3. Click on the **Search** button. The Duplicate Name checker found Jones, Bob E Mr. as a match.

If this were the person for whom we intended to create a Name Card, (i.e. it's indicating the Name Card already exists) we could click on the hyperlinked **name** to display the existing Name Card and modify it as needed.

Since this is not the person for whom we want to create a Name Card, we will continue to create a Name Card.

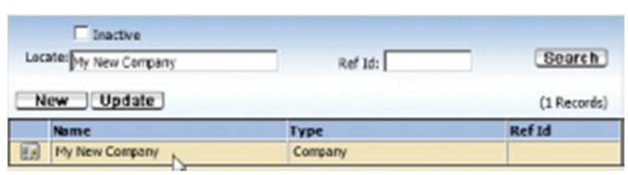


4. Click the **Next** button to display the Add New Name Card window.

*Notice that The **Type** field defaults to Person and search term auto-fills in its field.*

5. Leave the **Type** field set to its default setting, Person, and then complete the following fields.

- Use the magnifying glass icon next to the **Prefix** field to enter Ms. as your prefix.
- Type Jane in the **First** field, Q in the **M** field, and Jones in the **Last** field. M stands for middle initial.



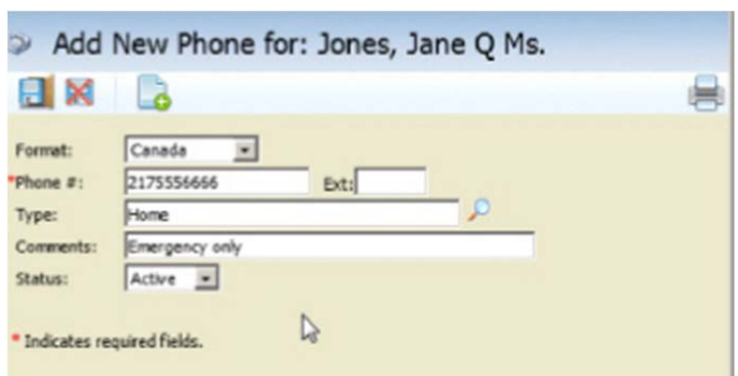
- Use the magnifying glass icon next to the **Company** field to display the Name Card pick list.
- Enter My in the **Locate** field and press the **Search** button to find the My New Company listing.
- Double-click on the My New Company entry to enter it in the **Company** field.

- A message prompt asks if you would like to automatically associate all the company's address and phone information.
- Click **OK** to associate the address and phone information and close the pop-up message. My New Company now is listed in the **Company** field, and the phone and address information is entered as well. Notice the phone number type is listed as Office, and the address is identified as Office.
- The **Type** field Jane Q. Jones will be changed from Person to Business Person on **Save**.
- Use the magnifying glass icon next to the **Title** field to enter Attorney at Law as Jane Jones' title.
- Enter data in the **Dept, Client/Ref ID**, and **Nickname** fields as appropriate.

NOTE: Not all of these fields require data, but because many reports and document generation templates key off data entered on these fields, the more data you enter, the better.

Adding Phone Information

1. Click on **Add New** hyperlink in the Phones section to display the Add New Phone for: Jones, Jane Q window.



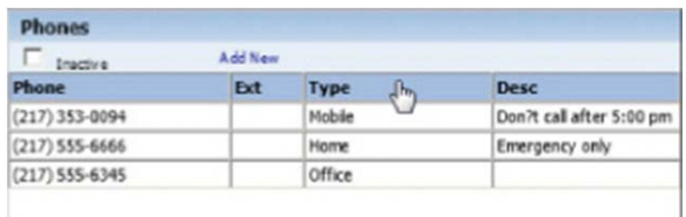
- Leave the **Format** field set to United States.
- Type 2175556666 in the **Phone #** field, which is a required field. *Legal Files* will format the numbers according to your chosen format upon saving this window.
- Use the lookup icon next to the **Type** field, and select Home from the **Phone Type** pick list.
- Enter Emergency only in the **Comments** field.
- Leave the **Status** field set to Active.
- Click on the **Save & Close** button to close the window and save your settings.

You can enter as many phone numbers as you need. We will enter a cell phone number next.

2. Click on **Add New** hyperlink in the Phones section to display the Add New Phone for: Jones, Jane Q window.

- Leave the **Format** field set to United States.
- Enter 2173530094 in the **Phone #** field.
- Select Mobile from the **Phone Type** pick list
- You can either use the lookup icon or you can use the type-ahead feature by typing Mob and then any choices starting with Mob will display for you to select from.
- Enter Don't call after 5:00 pm in the **Comments** field.
- Leave the **Status** field set to Active.
- Click on the **Save & Close** button to close the window and save your settings.

NOTE: Notice each newly added entry appears at the top of the list.



Phones

Inactive   Add New

Phone	Ext	Type	Desc
(217) 353-0094		Mobile	Don?t call after 5:00 pm
(217) 555-6666		Home	Emergency only
(217) 555-6345		Office	

Later in the chapter, we will learn how to re-order your Phones, Address, Email, and Internet lists.

Adding Address Information

- Click on the **Add New** hyperlink of the Address section to display the Add New Address for: Jones, Jane Q window.
- Leave the **Format** field set to United States. As with the Add New Phones For: window, *Legal Files* will automatically format your address according to your selection in System Configuration; Canada and Free Form are the other choices.
- Type 101 Easy Street in the **Line 1** field, which is a required field.
- Leave the **Line 2** field blank; this field is useful for including building names or apartment or suite numbers.
- Use the magnifying glass icon next to the **City** field, and select Springfield, IL 62703 from the **City** pick list.
- Use the lookup icon next to the **Type** field, and select Home from the **Address Type** pick list.
- Leave the **Description** field blank and the **Status** field set to Active.
- The **Description** field can be useful for entering any notes about the address, as needed. The **Status** field allows you to make some addresses inactive, rather than deleting them.

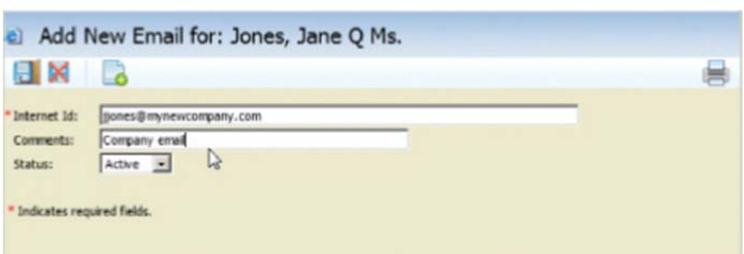
- Click on the **Save & Close** button to close the window and save your settings.

Notice the address is now properly formatted. **Envelope** , **Map** and **Weather** icons display in the **Desc**. column. Use these to print mailing envelopes, and to view map and weather information corresponding to the address. If we had entered descriptive comments, they would be listed beneath the icons.

You can enter as many additional addresses as you need. We will just enter the one for now.

Adding Email Information

1. Click on the **Add New** hyperlink of the Email section to display the Add New Email for: Jones, Jane Q window.



- Type jjones@mynewcompany.com in the **Internet ID** field.
- Type Company Email in the **Comments** field blank and the **Status** field set to Active.
- Click on the **Save & Close** button to save your settings and close the window.

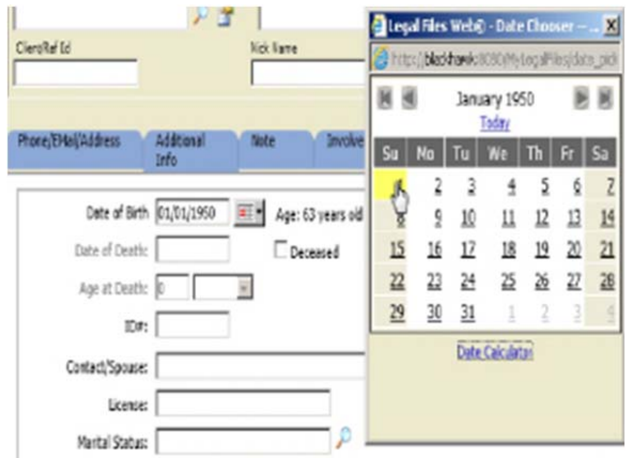
What you entered in comments Company Email, is listed in the Desc field.

You can enter as many additional Email addresses as you need. We will just enter the one for now.

Entering Additional Information

1. Click on the **Additional Info** tab to continue entering Name Card data:

- Enter your birth date in the **DOB** field. Use the **Calendar** icon to select your date or, if you don't relish clicking back 20, 30 or 40 years to select the date, you can enter the date directly in the **DOB** field, using the mm/dd/yyyy format. Be sure to enter the forward slashes (/). To verify that your typed date works, click on the **Calendar** icon after entering your date.

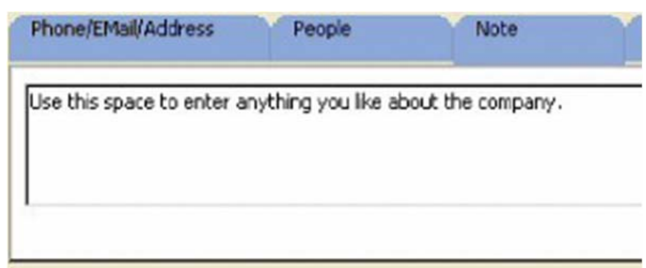


What do you see?

- Close the Calendar window and enter data in the **ID#, Alias, Contact/Spouse, License, Marital Status, Ethnicity,** and **Gender** fields as needed.

The **Alias** field is not interchangeable with the **Nickname** field. The **Alias** field is useful for tracking people who may use multiple names, legally or otherwise. Use the **Marital Status, Ethnicity,** and **Gender** fields if you are required to track and report this information.

2. Click on the **Note** tab to enter any additional notes about the person. For example, you could use it to include descriptive information to help you place who the person is, or to include helpful information about the person, such as *needs a translator*.



3. Click on the **Save & Close** button to save your settings to the Jane Q. Jones Name Card and close the window.

Changing the List Order for Phones, Addresses, and Email

The phone numbers, Email, and addresses initially are listed in the order you created them, with the most recently added number at the top of the list. *Legal Files* allows you to rearrange the list as needed. This procedure applies to Phone, Address, and Email. The item at the top of these lists is considered primary and is the item to be used in a document generation document which includes this data.

To rearrange the list order of phone numbers:

1. Highlight the Home phone number listing from the Phones section, which should be the 2nd phone number on the list.

   Notice now the appearance of the **View Detail, Delete**, and **Up** or **Down** hyperlinks once an item is highlighted.

2. Click the **Up** hyperlink to move the Home phone number above the Cell phone number. Similarly, you could have highlighted the Cell phone number and clicked the Down hyperlink to move it beneath the Home listing. Likewise, you could highlight a listing and click on the **Delete** hyperlink to remove the listing altogether.
3. Repeat this process as needed to change the list order for Address and Email information.

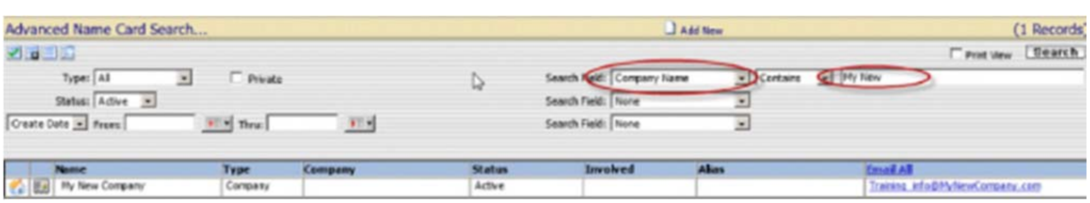
NOTE: The phone number/address/email at the top will be the number displayed for that person wherever these values are shown in Legal Files windows (i.e., list of File Related Persons, etc.).

Opening the Company Name Card

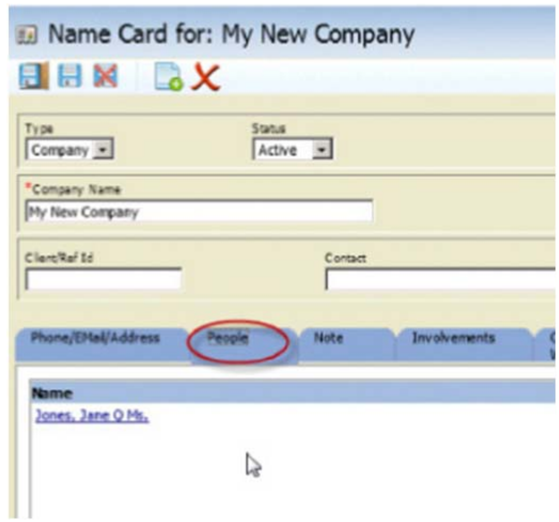
For this exercise, you will open the My New Company Name Card in order to see the People associated with this Name Card (i.e., Jane Q. Jones). You then will open Ms. Jones' Name Card from the company Name Card and attach an image to her Name Card.

To open the My Company Name Card:

1. On the Advanced Name Card search window Select Company Name in the **Search Field**, select **Contains** and enter My New in the **search term** field.



2. Click on the **Search** button to quickly find it in the Name Card list.
3. Double click on the **My Company** listing to display the My Company detail window or single click on the **Detail** icon (on left hand side just right of the Home icon).



Notice the company's phone number, address, and Email address is already entered. You can enter additional data as needed.

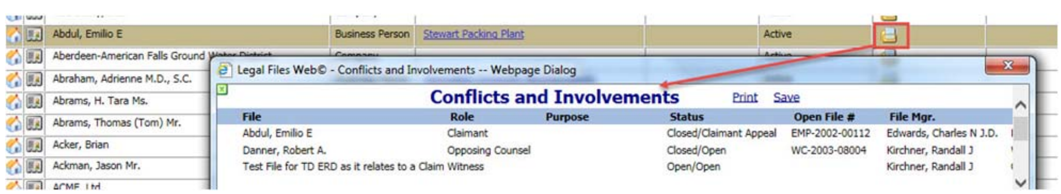
4. Click on the **People** tab to display the people associated with this company for whom a Name Card exists. Notice that Jane Q Jones is listed on the People tab, along with Jane Professional.
5. Click on the **Jones, Jane Q** hyperlink to display the detail window for her Name Card.

Involvements on Name Cards

Linking a Name Card to a file will create a File Related Person association for that Name Card. (See "Adding a File Related Person or Company" on page 51 in this manual for details on relating Name Cards to files.) *Legal Files* tracks every file to which a Name Card is related, and has three ways for you to see this information.

On the Name Card Advanced Search window:

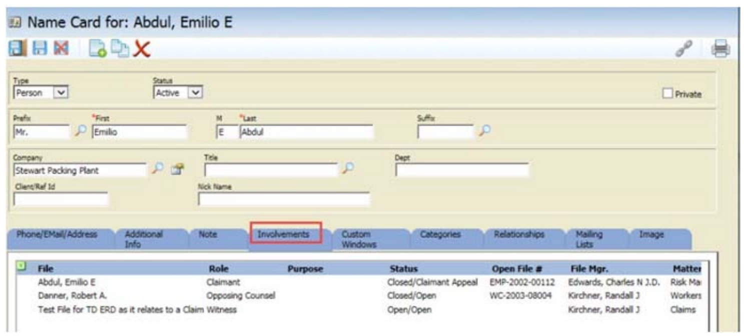
1. Click on the **Name Cards** hyperlink in the Manage section of the menu at left.
2. Look for a column named Involved. A folder icon in this column  means the Name Card in this row has been related to a file.
3. Click on this icon. The Conflicts and Involvements window opens, displaying the files to which this Name Card is related, and information about the person and file.



On the Name Card Details Window:

1. Click on the **Name Cards** hyperlink in the Manage section of the menu at left.

2. In a row containing a folder icon in the Involved column, double click on the name of the person. The Name Card Detail window opens.
3. Click on the Involvements tab. This also displays the files to which this Name Card is related, and information about the person and file.



On the Name Card Home Page:

1. Click on the **Name Cards** hyperlink in the Manage section of the menu at left.
2. In a row containing a folder icon in the Involved column, click on the Name Card Home icon . The Name Card Home window is displayed.
3. The Involvements window displays the files to which this Name Card is related, and information about the person and the file.

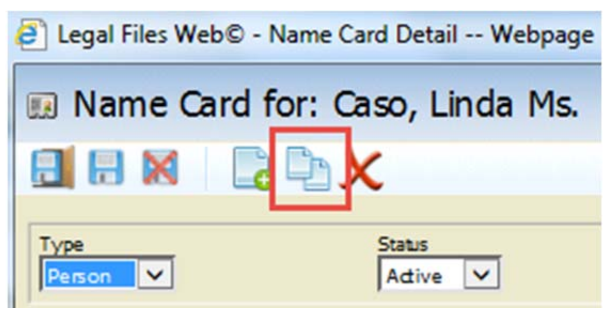
NOTE: From the Name Card Home page only, the file names are hyperlinks to the File Home page; the other views of Involvements are lists only.

Attaching an Image to a Name Card

1. Click on the **Image** tab to attach an image to Jane Q Jones's Name Card.
2. Clicking on the **Image** tab displays the **Upload Image** icon in the upper-left side of the pane.
3. Click on the **Upload Image** icon to browse to wherever the picture you want is saved so you can attach it to the Name Card.
4. Once displayed, use the **Delete** hyperlink to remove the image. Attaching and removing an image from the Name Card does not affect the image itself, which remains stored elsewhere. Moving, renaming, or deleting the stored image will prevent the image from being displayed. If you move or rename the image, you will need to reattach it for it to display again.

Copy a Name Card

This feature is a quick and handy way to easily create several name cards for parties who share common contact information (family members, business associates, etc.). From the Name Card Detail Window, click on the **Copy** icon. All personal contact information is copied to the newly created Name card, but not other data, such as Involvements. Once created, the new card can be edited.



Managing Users

Concept

The Manage Users view lists all the Name Cards of the *Legal Files* users. From here, *Legal Files* users can view and modify the Name Card data of *Legal Files* users *(except in Enterprise sites, where Name Cards are managed at the Enterprise level).*

User Name Cards (like person, business person, and company Name Cards) store basic information about every *Legal Files* user. Every user must have a Name Card if they are to be used in or referenced to files and/or Action items.

User Name Cards are added to the database by the *Legal Files* system administrator. Be sure to contact your *Legal Files* system administrator to add or remove user Name Cards as needed.

The Name Cards displayed from the user list view look identical to those in the Name Cards list view. They feature all the same fields and buttons and have the same functionality, except that only the system administrator can add or remove a user Name Card.

Although user Name Cards can be accessed from the Name Cards list view, the Advanced User Search view is provided for your convenience and is the recommended way of managing user Name Cards.

Legal Files users can also use the user list view to manage all aspects of user-related Actions for every user. See "Using Action Items" on page 96, for information about user-related actions.

Chapter Lesson

In this chapter, you will become familiar with the Manage Users view and learn what you can do from this view. Specific information about user-related actions is explained in "Using Action Items" on page 76. See "Manage Name Cards" on page 70 for specific information about the contents of the Name Card detail window.

Managing Users

Use the Manage Users view to display a user's Name Card information and to manage all aspects of a user's action items. User Name Cards are listed in both the Manage Users and the Manage Name Cards views, but access to a user's action items can only best be managed from the Manage User view.

NOTE: User security is managed by your system administrator.

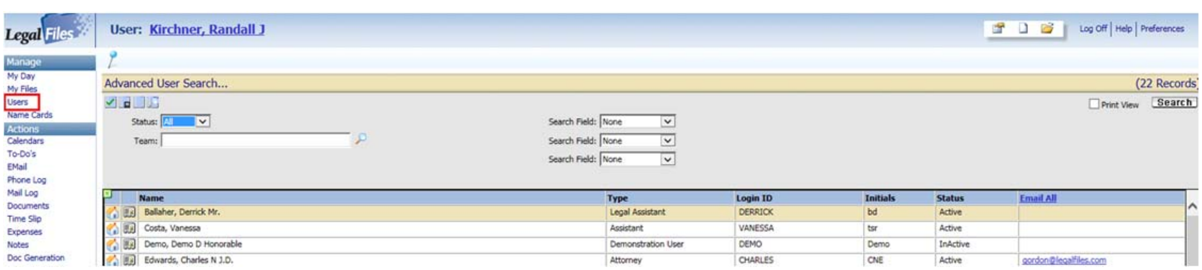
Although the **Add New** button (from a displayed User Name Card's detail window) allows you to create a new Name Card, the Name Card is saved only to the Name Card list; it is not designated as a user nor is it available from the Advanced User Search window or from user pick lists. To add a new user, contact your system administrator.

Although the primary function of the Manage Users list is to manage actions for a user, the procedure for managing Action Items remains the same, regardless whether it is user- or file-related; refer to "Using Action Items" on page 96 for information about using Action Items.

Displaying the Manage Users View

Use this section first to initially orient yourself to the Manage Users view before moving to the specifics of creating and managing specific Name Cards.

1. Click on the **Manage Users** hyperlink in the upper-left corner on the Manage menu to display the Advanced User Search window.



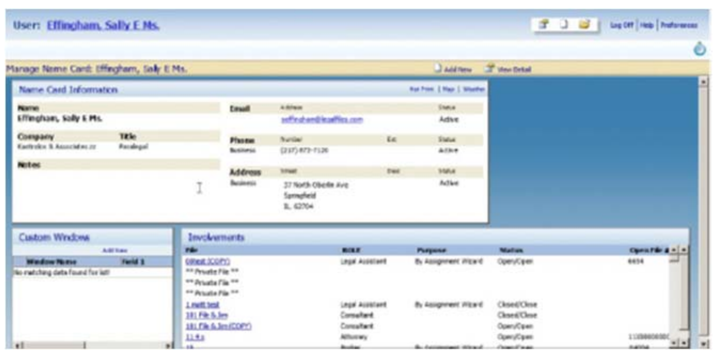
NOTE: The User field at the top of the Legal Files window displays the name of the logged-in user listed in the User List window.

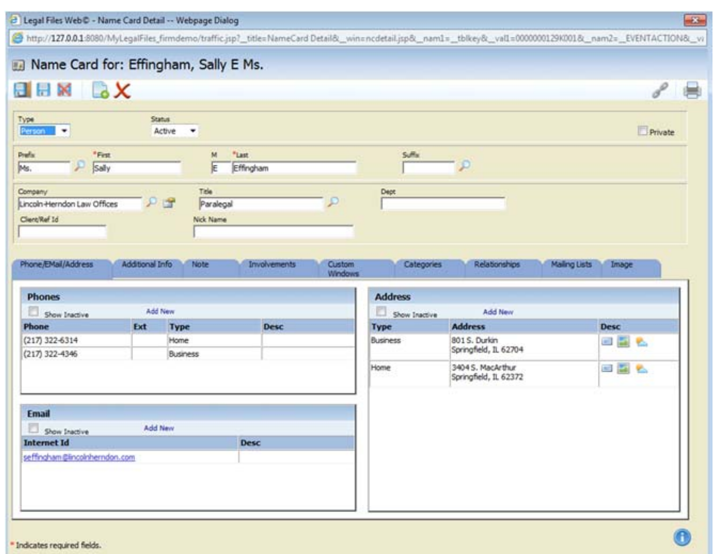
2. Use the scroll-bar to the right of the Advanced User Search window to scroll through the list, or search for a user by selecting a **Search Field** (e.g. First, Last or Full Name) and press the **Search** button to locate that user.

NOTE: The table format of the Advanced User Search window allows you to see some user data at a glance, without opening the Name Card.

3. Single-click anywhere in the list (except for the icons or Email hyperlinks). Notice how although the list-view does not change, the highlighted user name is now listed in the User field at the top of the *Legal Files* window.

NOTE: If you were to click on an Action item (e.g. Calendar, To-Do, and Document) it would display those items pertaining to the user whose name is displayed at the top of the Legal Files window.





4. Double-click on the name listed in the **User:** hyperlink at the top of the window, or single click on the **Home** icon in the Name Card list to display the user's Name Card Information. This window displays an at-a-glance view of the Name Card Detail window, allowing you to see the user's General Information, File Involvements, and Custom Windows panels for the Name Card, as well as the user's primary Email address, phone number, and address.

- Click on any hyperlink from the Involvements panel to go directly to that file's file menu display, where you can manage all aspects of that file from the User view.

- Also the Action Items to the left of the window now correspond to the displayed file.

5. Click on the **Manage Users** hyperlink at the left of the window to return to the list of users.
6. From the Advanced User Search window, click on the **Name Card Detail** icon or double-click on a name in the list to display the Name Card Detail window for that user. You also can highlight the user name in the list, and then click on the **View Detail** hyperlink at the top of the User list.

NOTE: Unless you have administrative rights to modify a user Name Card, you probably do not need to access the Name Card Detail window except to view additional phone numbers, mailing addresses, or Email addresses.

Using the Advanced User Search Window

The Advanced User Search functions the same as other advanced search windows in *Legal Files*.

Search

You can search for a user by Department, Name, Login ID, along with other criteria.

Click on the **Search Fields** drop down list to view the various criteria you can use to search by.

Teams

You can display a list of only those users within a specified team.

NOTE: Teams are set up in Legal Files Desktop.

Display a Users' Name Card Data

Click on the **Home** icon to display the user's basic Name Card information.

- Click on the **Detail** icon to display the user's Name Card Detail window.
- Double click anywhere (except on icons or Email hyperlink) on the row for the user to display the user Name Card Detail window.
- Click on the name shown, at the top of the window, in the **User:** field to display the user's basic Name Card Information.

Although it looks like any Name Card for which you can add, modify or delete the data, the user Name Card data should, in most cases, only be changed by the system administrator.

Display and Manage a User's Action Items

With the user's name, at the top of the window, in the **User:** field click on an Action Item hyperlink in the left column to access the Action item pertaining to that user.

- Click on the Action Item to display its detail window (see "Using Action Items" on page 96 for more information), or
- Click on **Manage Users** to return to the User list view to select a different user.

Ordering and Re-Ordering the List View

By default, the names in the list view are displayed in alphabetical order, though you can click any one of the columns to organize your list according to that column's category. The columns can be selected to organize your list in ascending or descending order within that category.

Print a List of Users

To get a list of the *Legal Files* users from the list view:

1. Click the **Export to Excel** icon at the top of the Name Card Home column. This exports the list of users to Excel, where you can format, sort and print the data.

Or, alternatively:

1. Select the **Print View** check box.
2. Click on the **Search** button. An HTML document listing the users in alphabetical order is displayed.
3. Use links to **Print** or to **Save** in HTML format.

Using Action Items

Concept

Action Items are used to facilitate interoffice communication. Actions categories are listed on the left-side pane of the *Legal Files* window. *Legal Files* uses the following Actions categories:

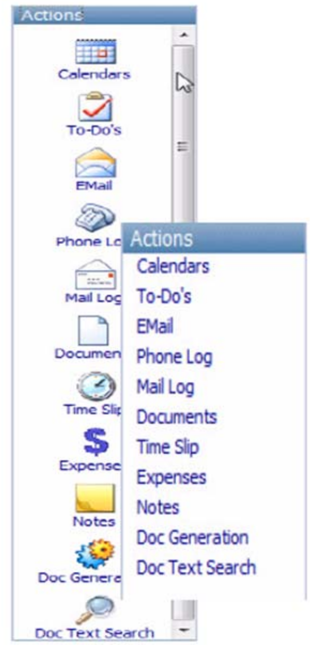
- Calendars
- To Do's
- Email
- Phone Logs
- Mail Logs
- Documents
- Time Slips
- Expenses
- Notes
- Document Generation (files only)

Each action item is automatically related to a user or file, depending on which view you have displayed. For example, from the Manage My Day view, click on the Documents hyperlink or icon to display the list of documents you, the logged-on user, has saved to *Legal Files*; click on the Email hyperlink or icon from the My Files view to display a list of Email items you have saved to all files; click on the Time Slip hyperlink or icon in the Users view to display the list of time slip records for a selected user. Actions for a specific file are also available from a file's Transaction Summary window.

Chapter Lesson

In this lesson you will learn to manage all aspects of action items, including how to create, copy, update, route, print, and delete action items.

Displaying the Actions Hyperlinks or Icons



The actions categories are displayed and accessed from the left-side of your *Legal Files* window. Each *Legal Files* user can display the listings as either hyperlinks or as icons. It's easy to toggle between the views.

1. Click on the **Actions** heading to toggle between the named hyperlinks or named icons according to your viewing preference.
2. Click on either a hyperlink or icon to display the Action items advanced search window.

Managing Action Items

Data is entered on a detail window for all Action items. Although the fields will vary according to the type, most of the functions are common to all. For example, you create, modify, and delete an action item in much the same way--regardless whether it is a To-Do, Phone Log, or Expense item. Other functions are common to several, but not all, -- such as the ability to route, copy, and create time slips for an action item.

Although the content and functionality of the detail windows vary somewhat according to the action item type (calendar, To-Do, phone log, document, etc.), it remains the same regardless whether the item is user- or file-related.

NOTE: There is an exception, of course--document generation applies only to files; you cannot generate a user-related document.

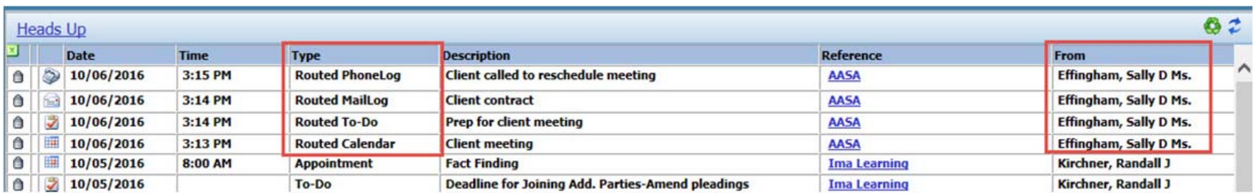
Because the content and function is the same for user- and file-related action items (with the exception of document generation), the examples in this chapter will alternate between user- and file-related action items.

Auto-Routing Action Items

Several Action Items have a built in functionality that routes items saved for another user to that user's Heads Up Display. This helpful feature alerts users to items they should be aware of, without the actions being manually routed by the user who saved them.

If Sally saves the following Action Items for Randall, they will auto-route to Randall's Heads Up Display … if Sally enters Randall's name in the fields identified:

- **Calendars** – Field to contain Randall's name: **User**.
- **To-Do's** – Field to contain Randall's name: **User Assigned**.
- **Phone Logs** – Field to contain Randall's name: **To**.
- **Mail Logs** – Field to contain Randall's name: **To**.


Heads Up

Date	Time	Type	Description	Reference	From
10/06/2016	3:15 PM	Routed PhoneLog	Client called to reschedule meeting	AASA	Effingham, Sally D Ms.
10/06/2016	3:14 PM	Routed MailLog	Client contract	AASA	Effingham, Sally D Ms.
10/06/2016	3:14 PM	Routed To-Do	Prep for client meeting	AASA	Effingham, Sally D Ms.
10/06/2016	3:13 PM	Routed Calendar	Client meeting	AASA	Effingham, Sally D Ms.
10/05/2016	8:00 AM	Appointment	Fact Finding	Ima Learning	Kirchner, Randall J
10/05/2016		To-Do	Deadline for Joining Add. Parties-Amend pleadings	Ima Learning	Kirchner, Randall J

Using the Detail Window: Common Functions

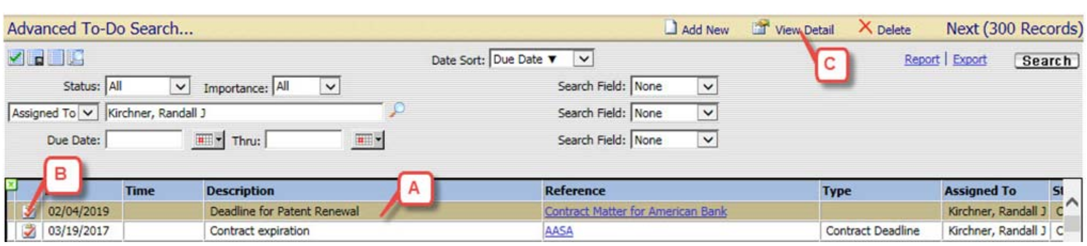
This section explains some of the Detail window buttons and check boxes that are common to all Action items that feature them.

Locating and Opening an Action Item's Detail Window

1. Display the Actions menu (screen shots shown on page 98).
2. Click on the icon or hyperlink (depending on how you have Actions set to display) for the type of action item you want to view.

NOTE: Keep in mind that the items contained in the list that will be shown will depend on whether you are in File or a User view mode, and will be specific to that File or that user.

3. Open the Action item's Detail window by using one of these three methods.



You can either:

A. Double click (except on icon or hyper-link) somewhere on the row of the Action item.
B. Single click on the **Detail** icon (located in the leftmost column of the Advanced Search window).
C. Click once on an item in the list (to highlight & select it). Then click once on the **View Detail** icon, at the top of the Advanced Search window.

Detail Window Buttons

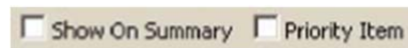
The following buttons exist on most Action detail windows. The explanations in this section apply in all instances where the button exists.

- **A - Save & Close.** Save data as it's currently entered and close the window.
- **B - Save.** Save data as it's currently entered and keep the window open.
- **C - Cancel.** Click on this button to close the window without making any changes
- **D - New.** Click on this button to create a new item based on this existing record. Some data fields will already be filled, but you can change the data as needed.
- **E - Copy.** Create a copy of this window.
- **F - Delete.** Click on this button to delete this record. A pop-up message asks you to confirm whether you want to delete it; click OK or Cancel as appropriate.
- **G - Time Slip.** Create a Time Slip using data entered into this Action Item window.
- **H - Route.** Click on this button and then select one of two options from the drop-down list. Select Route Item to select the users to whom you want to route this item; select Route History to display this item's routing history -- such as the date, time and user (who routed it and to whom it was routed), and the routing message.
- **I - Route History.** Show the history of routing of this item.
- **J - Print.** Click on this button to print a copy of the detail window.

NOTE: A To-Do, Mail Log, or Document window must be saved before routing or attaching anything. Saving the window will not close it, but will ensure your ability to route or attach the data. Once completed, save the data again to close the window.

Detail Window Check Boxes

The following check boxes exist on most, if not all, action detail windows. These explanations apply in all instances where check boxes exist.



- **Show on Summary**. Check this box to include this item on the file's Menu Summary Report, although whether this data displays on the report depends on the report criteria established by your system administrator.
- **Priority Item**. Check this box if you want the item to display as a priority item in the list view. When marked as a priority item, the Action item displays a red !, making it easy to distinguish from a non-priority item in the list.

General Instructions

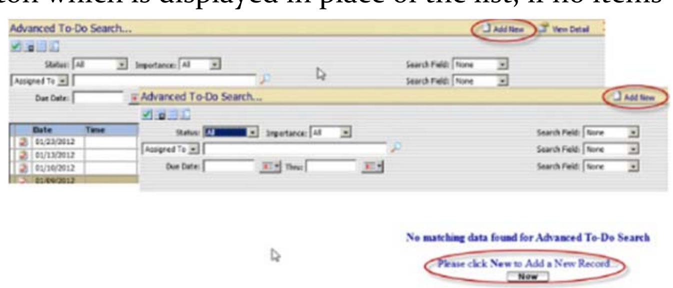
The general instructions in these next sections apply to each of the following types of actions. The process of creating, deleting, routing, printing, etc. is mostly the same for all action items.

- Calendars
- To Do's
- Email
- Phone Logs
- Mail Logs
- Documents
- Time Slips
- Expenses
- Notes

Creating an Action Item

A new item is created from either the **Add New** hyperlink at the top-center of the Advanced Search panel of the list view or the **New** button which is displayed in place of the list, if no items exist.

Clicking on either the **New** button or the **Add New** hyperlink displays the Add New detail window.



To create an action item:

1. Click link for the type of action item you want to display the Advanced Search for.
2. Click the **Add New** or **New** hyperlink. A new detail window is displayed.
3. Use the magnifying glass icons, check boxes, drop-down lists, or enter text directly into the fields of the detail window as needed to enter data for a new item. The fields noted by a red asterisk are required fields; the window cannot be saved unless data is entered in the required fields.
4. Enter data in the fields and check boxes as needed.
5. Click on the **Save & Close** or **Save** button to save your settings (or to send an Email), or click on the **Cancel** button to cancel your changes and revert to the previous settings.

Modifying an Action Item

Use the magnifying glass icons, check boxes, drop-down lists, or enter text directly into the fields of the detail window as needed to change the data. The fields noted by a red asterisk indicate fields for which data is required.

NOTE: Email cannot be modified.

To modify an action item:

1. Locate and open the action item. See “Locating and Opening an Action Item's Detail Window” on page 98 for instructions.
   A. The name of the file or user the item references is noted in the title of the detail window (e.g., To-Do for User: Randall Kirchner or To-Do for File: ABC School District).
2. Make changes to the fields and check boxes as needed.
3. Click on the **Save & Close** or **Save** button to save your settings (or to send an Email), or click on the **Cancel** button to cancel your changes and revert to the previous settings.

Deleting an Action Item

With the proper security, you can use this procedure to delete an action item. An action item can be deleted from either the list view (Advanced Search window) or from the action items detail window. Once deleted, it is removed from the List view and from the database.

To delete from the list:

1. Locate the action item list you want to view. See "Locating and Opening an Action Item's Detail 78 for instructions.
   A. The name of the file or user the item references is noted in the title of the detail window (e.g., To-Do for User: Randall Kirchner or To-Do for File: ABC School District)
2. Click once on the action item that you want to delete, to highlight and select it.
3. Click on the **Delete** icon Delete at the top of the Advanced Search window.

The detail window for the item you want to delete is opened.

A pop-up message asks, are you sure you want to delete the current record.

4. Click **OK** to delete the item or **Cancel** to return to the detail window without deleting the item. Upon clicking **OK**, the pop-up and detail windows close and the item is removed from the List view.

To Delete from the action item Detail window:

1. Locate the action item you want to delete and open its detail window. See "Locating and Opening an Action Item's Detail Window" on page 98 for instructions.
2. Click on the **Delete** icon near the top of the window.

A pop-up message asks you if you are sure you want to delete the record.

3. Click **OK** to delete the record, or **Cancel** to return to the detail window without deleting the item. Upon clicking OK, the pop-up and detail windows close and the item is removed from the List view.

*NOTE: The **Delete** button and **Delete** icon are available for Email items that belong to you. Depending on your security access, you may be able to view Email belonging to other users, but you can only delete messages belonging to you. If an Email message is sent to you and other users, deleting this message removes it from your Email view only; the Email is still available to the other users.*

Routing an Action Item

Sometimes you need to notify other people about an action item even though the item is not actually to or for them. In such cases, you can route action items and documents to other users with the Routing button in the upper-right corner of the action item's detail window. The routed items will display in the routed user's Heads Up list.

NOTE: Routing an item does not assign or give ownership of an item to the user it is routed to. Therefore the routed item will not (necessarily) show in their User view of Action items.

NOTE: Email and Time Slip action items cannot be routed.

To route an action item to one or more users:

4. Locate the action item you want to Route. See "Locating and Opening an Action Item's Detail Window" on page 98 for instructions.
5. Click on the **Route** icon at the top of the detail window.
    a. The Routing window is displayed.
6. Click in the check box next to each user to whom you want the item routed or select a group of users based on a Team.
7. Type a note in the **Message** field, if desired.
8. Click on the **Send** button to route the item and close the window or **Cancel** to close the window without routing the item.
    a. The routed item will appear in the Heads Up lists of the user(s) to whom the item was routed.
9. Click on the detail window's **Save & Close**, **Save** or **Cancel** buttons to close the window.

*NOTE: After you Send you must either do **Save & Close** or **Save** in order for the routing to occur. SO Remember: Send AND Save!*

It is also necessary to save the detail window if you add or change any of the data fields.

Printing an Action Item

You can print an item's detail window from the **Print** button in the upper-right corner of the window.

To print a copy of an Action item's detail window:

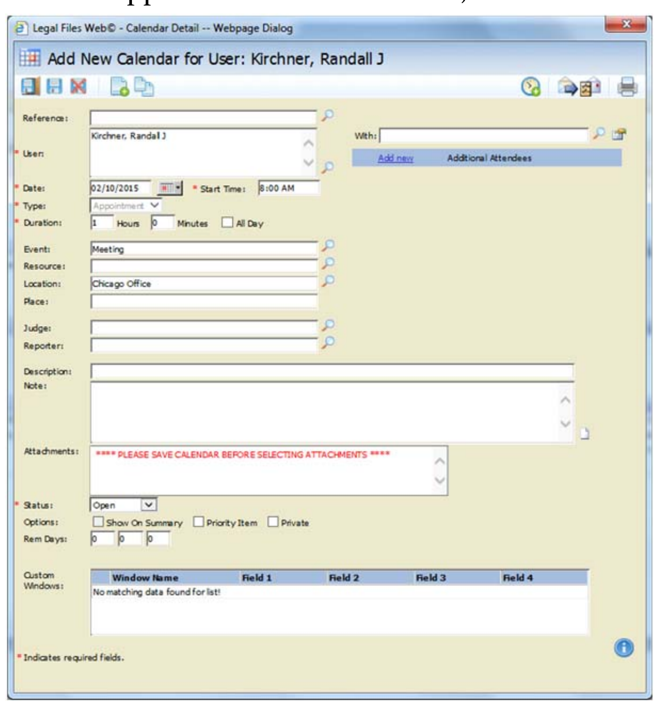
1. Locate and open the action item you want to print. See "Locating and Opening an Action Item's Detail Window" on page 98 for instructions.
2. Click on the **Print** icon in the upper-right corner of the window.

A printer dialog window displays from your Windows operating system. For help using the printer controls, consult the documentation for your Microsoft Windows operating system.

Managing Calendars

Use the *Legal Files* Calendar to schedule appointments for yourself and others, reference the appointments to files, and even schedule your office resources such as conference rooms and audio/ visual equipment. You can also use Reminder Days to give advance Heads Up notice when an appointment is due. For example, upon creating or modifying a Calendar, you can set it to issue a reminder notice any number of days you specify in advance of the due date.

In addition to creating calendar appointments, you can modify and/or copy an existing appointment, create a time slip for the appointment, route the appointment to other users, and print a copy of the appointment.



Calendars can also be imported into *Legal Files* from external programs, such as Outlook, Gmail, Lotus Notes and GroupWise. The saving process is similar to saving Emails, as described in "Managing Email" on page 123. See additional documentation for specific instructions to your calendar program.

First, we'll create a user-based calendar appointment and then we will create a file-referenced appointment.

Creating a Calendar Appointment

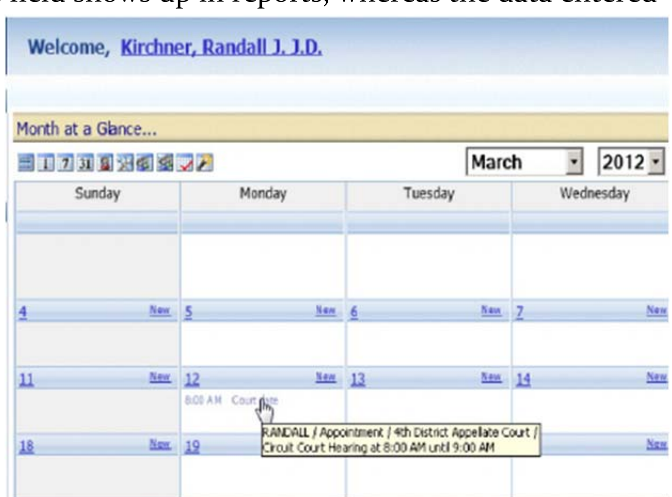
1. From the Manage My Day view, click on the **Calendars** hyperlink or icon under the Actions heading.

a. The Month At A Glance calendar view, for the current month, is displayed by default, and because you selected the Calendars hyperlink or icon from the Manage My Day view, the calendar view is automatically referenced to you, the logged on user (remember that your name will be listed in the Welcome field at the top of the window).

2. Click on the **New** hyperlink next to one of the days of the current month.
   a. The Calendar Detail window is displayed. The **Date** field is automatically displayed with the date you chose, and the User field defaults to the logged-in user.
3. Type 8:30am in the **Start Time** field.
   a. Enter the time in HH:MM or H:MM format with am or pm. You can enter am or PM (with or without spaces), but do not enter a.m. or P.M.
4. The **Duration** field defaults to 1 hour or whatever you have it set in Preferences. Enter *30* in the **Minutes** field to set the duration of your appointment to 1 1/2 hours.
5. Enter something like *Meeting* in the **Event** field. Do so by clicking on the lookup icon and selecting from the **Events** pick list window.

NOTE: *The items contained in pick lists throughout the program are maintained by your staff. If you don't find what you are looking for, talk to your system administrator.*

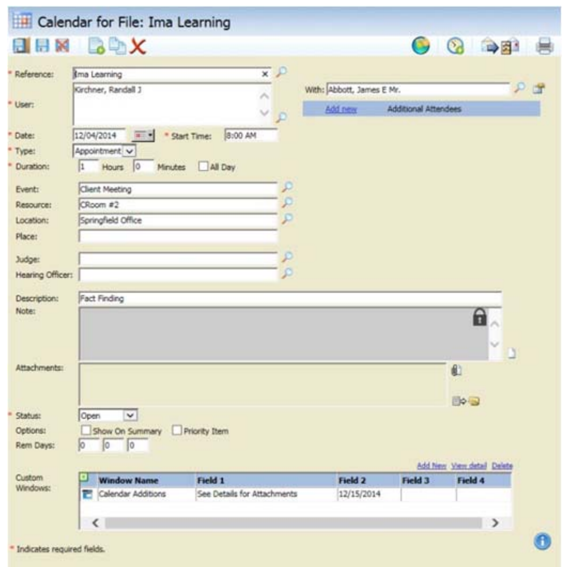
6. Leave the **Resource** field blank.
7. Enter Out of Office in the **Location** field.
8. Enter *Meeting* in the **Description** field.
   a. The data entered in the Events field shows up in reports, whereas the data entered in the **Description** field is displayed on the Calendar view next to the appointment time for convenience, allowing you to see the description and appointment time on the calendar view without opening the detail window.



9. Use the **Note** field to enter a more lengthy description of this calendar appointment,
should you desire.

10. Leave the **Status** field set to Open. Use the Status settings to help track and categorize appointments as needed. Selection lists and reports can be filtered by status.
11. Click on the **Save & Close** or **Save** button to save the calendar item.

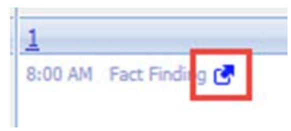
    The Calendar appointment appears in the Monthly calendar view on the date you specified. Notice that the time and description are listed.



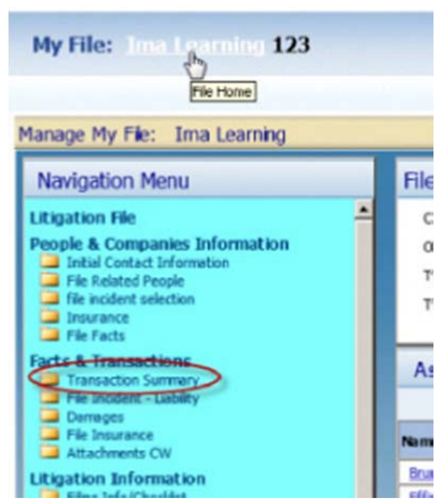
12.  Click on the **right arrow** in the upper-right corner of the calendar. The calendar advances one month. The appointment you just set is no longer listed.
13. Click on the **New** hyperlink for the date you want. The **Date** field displays the date you selected, and the **Time** field reflects your current time.
14. Enter 9:00 am in the **Time** field.
15. Set a **Duration** of 1 hour.
16. Using the magnifying glass icon, enter Client Meeting in the **Event** field.
17. Type Fact finding in the **Description** field.
    a. Descriptions are clearly visible on the calendar view. Use this field for quick information about the appointment.
18. Using the magnifying glass icon, enter the *Ima Learning* file in the **Reference** field.
19. Using the magnifying glass icon, enter Mr. James Abbott in the **With** field.
20. Using the magnifying glass icon to enter something in the **Resource** field. (e.g. Conference Room #2)
21. Using the magnifying glass icon to enter something in the **Location** field (e.g. Springfield *office*).
22. Leave the **Judge** and the **Reporter** fields blank. These are custom prompt labels/fields, meaning they can be renamed or hidden by system administrators.

NOTE: Once the calendar is saved, two icons appear to the right of the Attachments window. If attachments were needed for this calendar, you can use the top ***Select Document*** *icon* *to attach documents already saved to the current file, or the bottom* ***Select Attachments*** *icon to attach documents currently saved outside Legal Files.*

23. Leave the **Status** field set to Open.
24. Click on the **Show on Summary** check box to include this appointment on any file menu summary reports generated for the file.
    a. This check box was not available for your *Meeting* appointment because this check box is only available for file referenced appointments.
25. **Save & Close** the Calendar item. Notice the new appointment date and description are listed on the calendar.
26. Go to the **My Files** view, locate and open the *Ima Learning* file.
27. Click on the **Calendar** hyperlink under Actions.
28. Do you see your Fact Finding appointment? Note the **Go to File** link appears on the calendar entry. Appearing only on calendars saved to files, it links to the file's home page. This feature is available for the following calendar views: Day at a Glance, Work Week at a Glance, Week at a Glance, Month at a Glance, Resource View, Group View, and Team View.



29. Do you see your *Meeting* appointment? Why not? Answer: Because you're in File View and that appointment was not referenced to a file. You'll only see it on the calendar when you are in the User view.
30. Click on the **My File: *Ima Learning*** hyperlink (at the top of the main window) to go to the file menu display.
31. Open the Transaction Summary menu item. Your calendar entry appears here as well; Transaction Summary lists all Actions saved to the file in reverse chronological order.



NOTE: The menu item could be named something other than Transaction Summary on your menu. The appointment is also listed in the file's Transaction Summary.

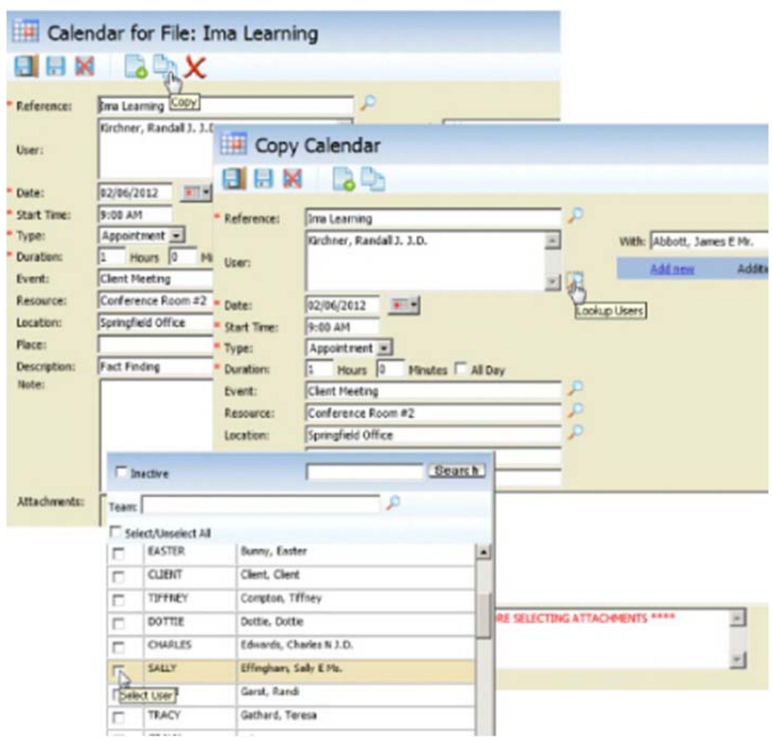
Reminder Days on Calendars

The field named **REM Days** at the bottom of the Calendar Detail window allows you to set three reminders of upcoming calendar events. Important factors to understand include:

- Any value entered into a **REM Days** window will create a reminder that many whole-calendar days before the date entered into the **Date** field.
- Reminders appear in the Heads Up Display only. The icon associated with a reminder is a light bulb icon .
- Reminders are the ONLY item appearing in the Heads Up Display that will *rotate off* the HUD automatically; they only appear on the day they are scheduled to appear. Due to this – assuming the calendar event falls on a weekday – entering REM Days in increments of 7 will almost guarantee they appear in the HUD on weekdays, and will be seen.
- You can set one, two or three reminders. If entering multiple reminders, begin with the box on the left, entering the highest value there. Use the next box for the next lowest value, and the last box with the lowest value, if needed.

Copy Calendar Items

You would like Sally Effingham to attend the Fact finding meeting, but you don't want to re-type the entire appointment. If you simply route the Calendar item to Sally, she'll see the appointment in her Heads Up list, but because the appointment is set for you, not her, she will not see the appointment on her calendar. That's where the Copy Calendar feature is useful.



The **Copy** button on the Calendar detail window lets you create a new appointment from an existing one. You need to open the Calendar item.

You can open it from Heads Up, from Calendars or from the Transaction Summary window. In this example we will do the following.

1. Return to the calendar view for the *Ima Learning* file. To do this click on the **My File: *Ima Learning*** hyperlink (at the top of the main window).
2. Choose **Calendars** from off the Actions menu (on left side).
3. Locate and open the 9:00 AM Fact Finding appointment to display the Calendar Detail window for that appointment.
4. The Calendar for File: *Ima Learning* window is displayed. Notice the data is exactly as you saved it.
5. Click on the **Copy** button. The Copy Calendar window now is displayed and all the data is exactly the same.
6. Use the lookup on the **User** field to locate and select Sally Effingham. Click **OK** on the User lookup window to keep Sally as selected.
7. Because we do not need to change any other data on the Calendar appointment, click on the **Save & Close** button to save the appointment and close the window.

- Both appointments appear in the *Ima Learning* Advanced Calendar Search window.
- Both will also be on the *Ima Learning* file's Transaction Summary.
- And there will be an appointment on the Advanced Calendar Search when logged in as Randall and also when logged in as Sally. Sally will also receive *two notifications* in her Heads Up Display: one will be for this Calendar appointment, and another will be for the auto-routed Calendar appointment.

NOTE: Whenever one user creates a Calendar or To-Do for another user, Legal Files immediately routes that Action to the user for whom it was created.

Printing Calendars

- The **Export to Excel** icon, found at the top of the first column of any calendar list (List View, Master Calendar List View) will export the listed calendars to Excel.

- The **Hot Print** icon (on a calendar detail window) and **Print** hyperlink (found on various calendar views such as: Daily, Weekly, Monthly) will print that specific calendar window.

- The **Report** hyperlink in the upper-right corner of Advanced Calendar Search will access a Crystal Report that you can use to generate reports. Check with your system administrator for information on whether that Crystal Report has been installed.
- The **Export** hyperlink (same location at Report hyperlink) will generate an HTML list of the calendar items currently shown in the list. You can either **Print** or **Save** that HTML document. If saved it could then be imported into an Excel spreadsheet.

To print the calendar view you current have displaying:

1. Display your calendar view (e.g. Day, Week, Month at a Glance)
2. Click on the **Print** button in the upper-right corner of the view.
    a. The Print window from your operating system displays.
3. Use the various settings to choose your printer and print preferences, as needed.

To print the details of a specific calendar item:

1. Open the calendar item from your calendar view. The Calendar detail window is displayed.
2. Click on the **Hot Print** (printer icon) in the upper-right corner of the detail window.

The Print window from your operating system displays. Use the various settings to choose your printer and print preferences, as needed.

About the Calendar Views

The *Legal Files* Calendar makes it easy to view anyone's time commitments in a variety of ways from the icons along the top-left side of the Calendar view window.

 **Calendar List** view displays all calendar items pertaining to your current view, either User or File.

- From this view but only in files, users can launch Work Flows. The Launch **Work Flow Wizard** button is located under the Search button on the right-hand side of the Advanced Calendar Search window. For more information about Workflows, see the Work Flow Wizards section in this manual.

Day at-a-Glance view displays every calendar item for a single day broken out by hour (defaulting to current day). Includes Open Items Only checkbox filter.

Work Week at-a-Glance view displays every calendar item and To-Do for the current work week (Monday - Friday). Includes Open Items Only checkbox filter.

Week at-a-Glance view displays every calendar item for the current week, broken out by day. Includes Open Items Only checkbox filter.

Month at-a-Glance view displays every calendar item for the current month, broken out by day. Includes Open Items Only checkbox filter.

Resource view allows you to check to see if a resource has been reserved for a particular time and date. If "Multiple Events" are listed, click this link to open a dialogue box with more information.

Group view allows you to check a daily calendar for more than one user at a time. If "Multiple Events" are listed, click this link to open a dialogue box with more information.

Team View works similar to Group view. The difference is that its list of users is from a Team.

Master View displays the Calendar items for all users for the date selected.

The **Recurring Calendar Wizard** lets you schedule recurring appointments for one or more users in a variety of ways.

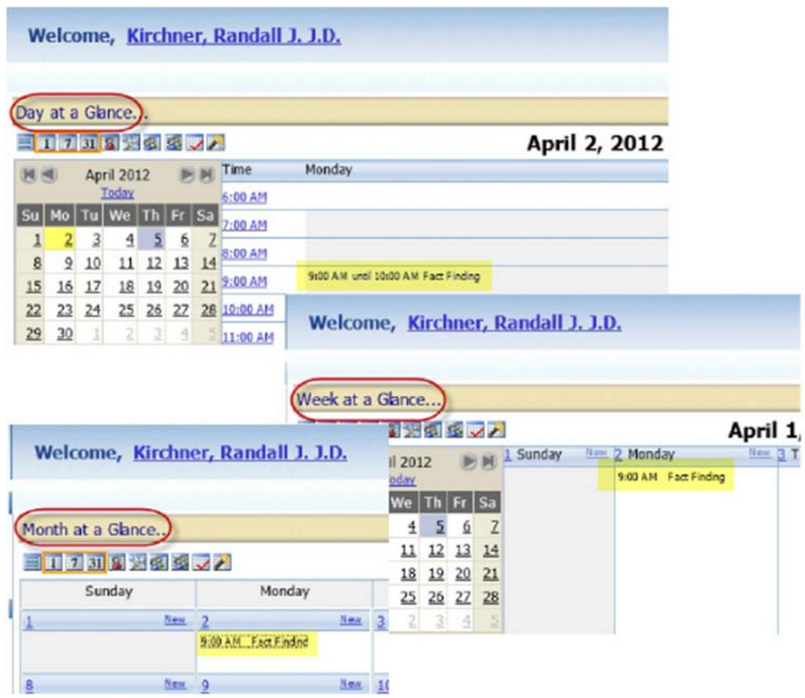
User Calendar Daily View Report prints a graphical daily view of a single user's calendar items for one day or a range of days.

My Week view (located under graphic calendar on Manage My Day) displays the logged-in user's Work Week at a Glance view.

Each view provides key information at-a-glance for the day, week, or month. You can view the complete details for an appointment in the Calendar detail window by clicking on the appointment in any of the calendar views.

DAY AT A GLANCE, WEEK AT A GLANCE, AND MONTH AT A GLANCE VIEWS

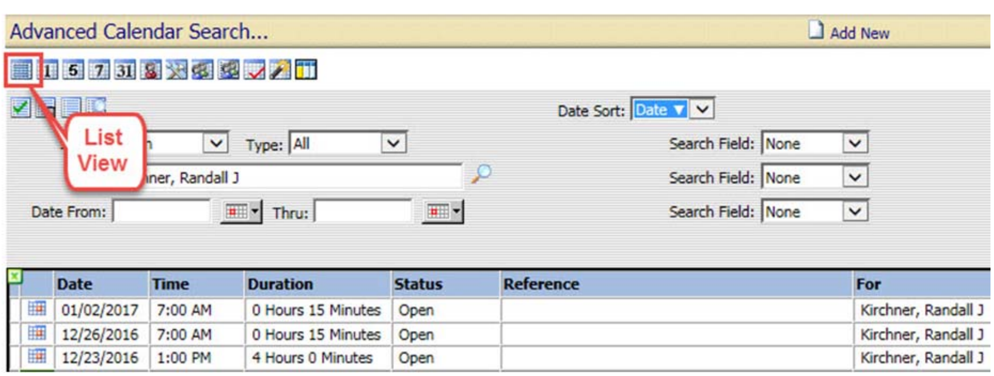
These three views let you see details for an appointment by floating your cursor over the appointment's hyperlink; the appointment details are displayed in a pop-up field that disappears when you move your cursor.



Click the **Print** hyperlink to print a copy of the view; click on the right or left arrows to display a different month and/or year. Click on the appointment's hyperlink to display its detail window.

LIST VIEW

This view displays a selection listing of calendar items based on your specified search criteria. For example, you can see all of Randall's appointments or all of Randall's appointments for a specific date or range of dates, or for a particular file/matter or with a particular person, and so on. The example displayed shows a list of all the appointments scheduled for Randall through January 1 to January 1, 2017.

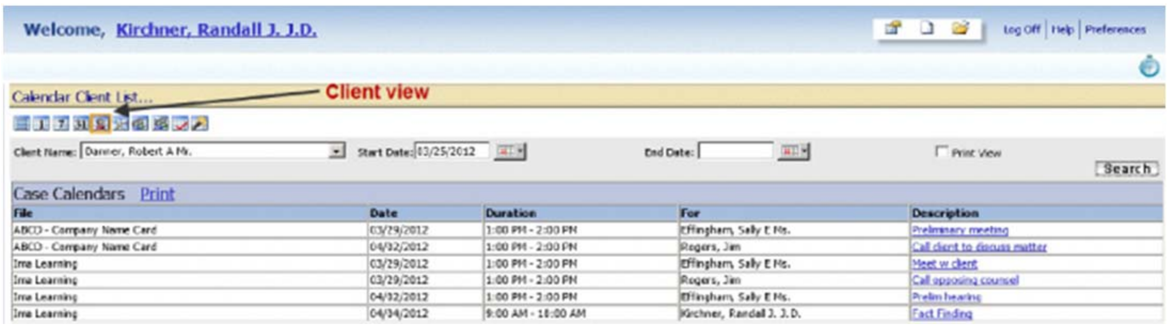


- Click on the **Add New** hyperlink to create a new appointment.

- Double click somewhere on the row of an appointment (except on a hyperlink or icon) or single click on a listing's Calendar icon (left-most column) to display the Detail window for the appointment.

CLIENT VIEW

Use this view to list and access the appointments of a specific client on a particular date or range of dates. Either the **Print View** check box or **Print** hyperlink is available from which you can display, print the listed items. You can modify existing appointments from this and all views.



Client View works when:

- A Name Card is added to a file as a File Related Person with Type = Client.
- Then calendar item(s) are created and that Name Card (which is a File Related Person and flagged as the Type of Client) is entered into the With field.

The Client View will show all calendar appointments within the specified date range. It will show appointments with the specified client and any other appointments within the date range for any files which also have a calendar appt. with that client that falls in the date range. The preceding example shows the search results for:

- *Legal Files* We / User View (not File View) therefore more than 1 file can display.
- Calendar / Client View
- Selected date range 03/25/2012 thru present
- Client selected is Danner, Robert A.

NOTE: Two different files appear on the list and multiple calendar appointments for both. One, or more, of those appointments will be marked as With the Client, Danner, Robert A. Those *that are not specifically with that File Related Person are included because they fall within the specified date range and are on same file(s).*

RESOURCE VIEW

Use this view to check for which resources have been scheduled on any given day. Select as many resources as you want, specifying a range of hours. By default, it shows you the resources for today's date, but you can use the Calendar graphic (lower left) to select another date, as needed. This view is particularly useful in determining whether a resource is available prior to scheduling an appointment for it.

The **Print View** check box or Print hyperlink is available from which you can display, print the listed items. You can create a new appointment with **Add New** and/or modify existing appointments, by clicking on the text description of an appointment, from this view.

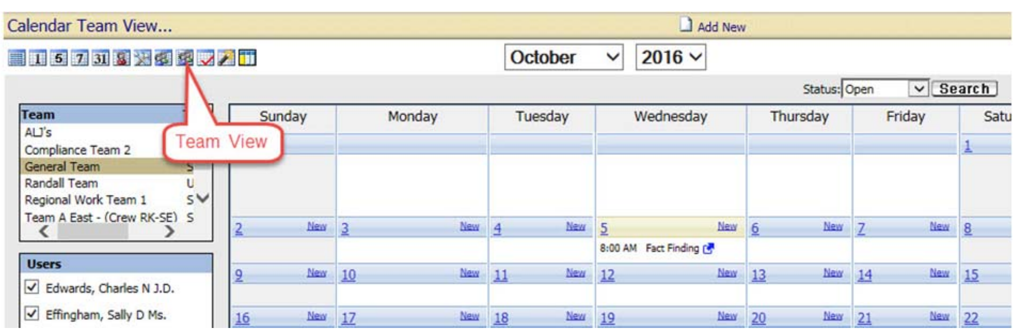
GROUP VIEW

This view lets you see appointments for multiple users at once on any given day. Select a group, and then select the users from that group (check box next to user names on User list) whom you want to include in the display. Calendar Groups are created by *Legal Files* administrators.

The **Print View** check box or **Print** hyperlink is available from which you can display, print the listed items. You can create a new appointment with **Add New** and/or modify existing appointments, by clicking on the text description of an appointment, from this view.

TEAM VIEW

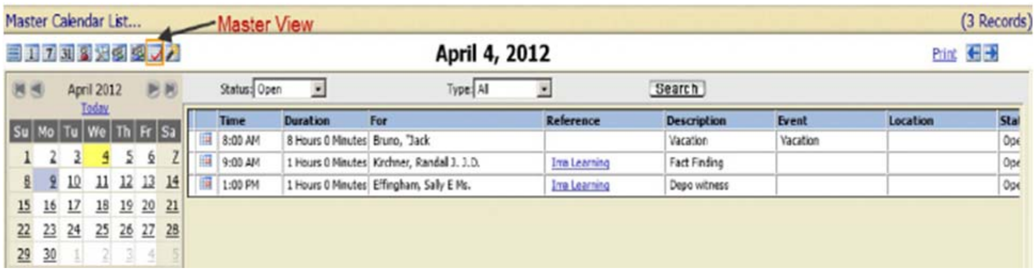
This view lets you see appointments for multiple users at once in a Month At A Glance view, and then select the users from that team (check box next to user names on User list) whom you want to include in the display. Teams are created by *Legal Files* administrators.



The **Print View** check box or **Print** hyperlink is available from which you can display, print the listed items. You can create a new appointment with **Add New** and/or modify existing appointments, by clicking on the text description of an appointment, from this view.

MASTER VIEW

This view resembles the Daily List view, except that it lists ALL calendar items for EVERY user for the selected day.



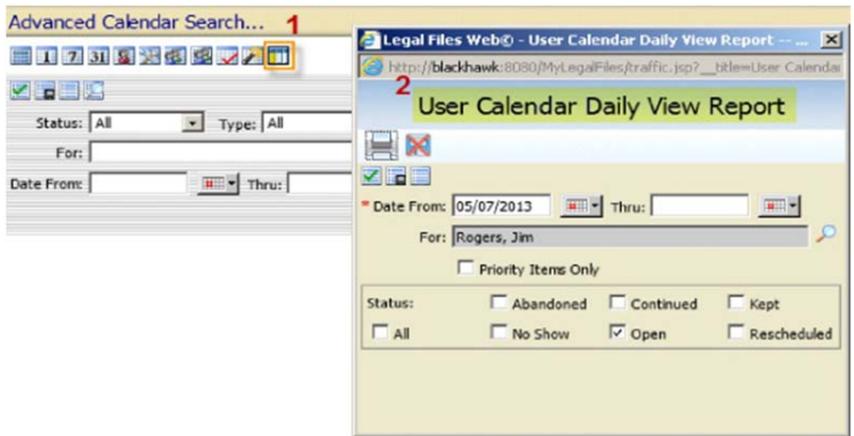
RECURRING CALENDAR

Clicking on **Recurring Calendar** icon #1 opens the Recurring Calendar Wizard #2.

The Recurring Calendar Wizard lets you schedule recurring appointments to recur on the dates and intervals you choose for one or more users in a variety of ways. For example, you can schedule the recurring appointment to occur daily, weekly, monthly, or yearly. You can specify on which days it is to recur, and the number of occurrences or on what date it is to end.

USER CALENDAR DAILY VIEW REPORT

Clicking on icon #1 opens the User Calendar Daily View Report #2.



The User Calendar Daily View Report prints a graphical daily view of a single user's calendar items for one day or a range of days which includes open To-Do's and contact information.

The Default Calendar View

Which of these calendar views display upon clicking the **Calendars** hyperlink or icon (on the Actions menu) depends on your settings in User Preferences. See "Establishing Preference Settings" on page 19 for how to do so.

Print hyper-link

The **Print** hyperlink is available from which you can display, print the listed items. You can modify existing appointments, by clicking on the listing's Calendar icon (left-most column) to display the Detail window for the appointment.

Previous & Next

Use the **Previous** time period / **Next** time period icon to move backward or forward for the date you wish to view.

Managing To-Do's

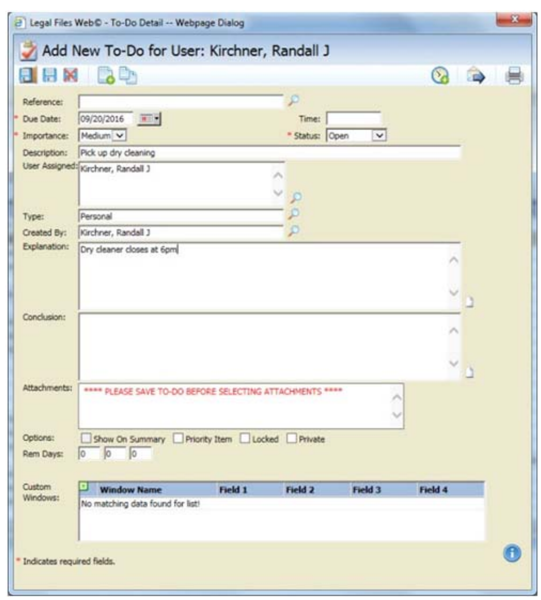
To-Do's are task assignments you create for yourself, for someone else, or that someone else creates for you. A To-Do appears in your Heads Up on the day the task is due. You can also use Reminder Days to give advance Heads Up notice when a task is due. For example, upon creating or modifying a To-Do, you can set it to issue a reminder notice any number of days you specify in advance of the due date.

To-Do's are managed from the **To-Do** hyperlink or icon of the Actions menu, and like other actions, To-Do's can be referenced to files or users. Click on the **To-Do** hyperlink or icon from within the My Files view to view and manage file-referenced To-Do's, and from the User view to view and manage user-specific To-Do's. As an added convenience, use the To-Do list in the Manage My Day view to find and manage your To-Do's for a specific date.

Creating a To-Do

Follow these steps to create a user (non-file referenced) To-Do for you, the logged-on user. Fields denoted by a red asterisk (*) require data to be entered before the To-Do can be saved (i.e., created).

1. Confirm that you are on User (e.g. Randall) home page (i.e. check top of window to see that is shows Welcome, Username).
2. Click on the **Actions** hyperlink to display the action items.
3. Click on the **To-Do's** hyperlink or icon.
    a. The Advanced To-Do Search window is displayed.
4. Click on the **Add New** hyperlink to display the To-Do detail window.
5. Leave the **Date** and **Time** fields set to today's date and current time.
    a. The **Date** and **Time** fields indicate when the To-Do is due.
6. Enter Pick up dry cleaning in the **Description** field.
7. Leave the **User Assigned** field set to you, the logged-in user.



Although *Legal Files* defaults to the logged-in user, you can use the Magnifying Glass icon to assign the To-Do to another user as needed.

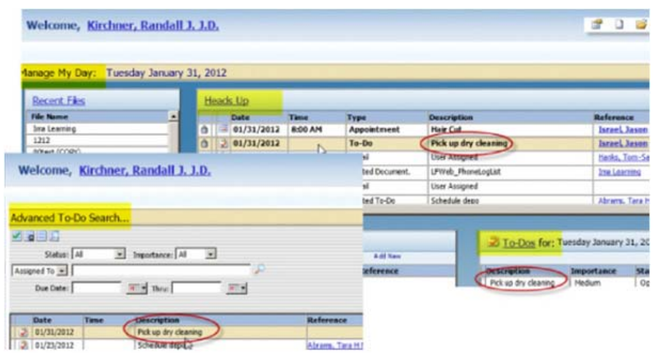
1. Enter Personal in the **Type** field.

   Remember to use the magnifying glass icon and select your entry from the pick list.

2. Leave the **Importance** field set to Medium, although you can set it to Low or High as needed.
3. Leave the **Status** field set to Open. The other options are Abandoned or Done.

4. Type Cleaner closes at 6 p.m. in the **Explanation** field.
5. Click on the **Save & Close** or **Save** to save your data and create the To-Do.

Do you see the To-Do in the Advanced Search window's To-Do list? If today is the Due Date for the To-Do, where else would you find it?



Because the To-Do is due today, it will be in your Heads Up list and in the To-Dos for panel of the Manage My Day view. You can also find it in the To-Do list of the Manage Users view when your name is highlighted.

NOTE: Had this To-Do been created for another user, that user would have seen TWO notifications in the Heads Up Display. Whenever one user creates a Calendar or To-Do for another user, Legal Files immediately routes that Action to the user for whom it was created.

Although you can remove the To-Do from Heads Up (by using the trash can icon) and still access to it from the various To-Do list views, sometimes it's helpful to leave To-Do's in Heads Up until the task is done. Heads Up pops up periodically with your new messages and notifications, and seeing the To-Do in Heads Up throughout the day serves as an added reminder that the task is due.

You can use the **Status** drop down list on the To-Do's detail window and mark it as Done or Abandoned. Changing that will remove it from Heads Up as well.

Reminder Days on To-Do's

The field named **REM Days** at the bottom of the To-Do Detail window allows you to set three reminders of upcoming tasks. Important factors to understand include:

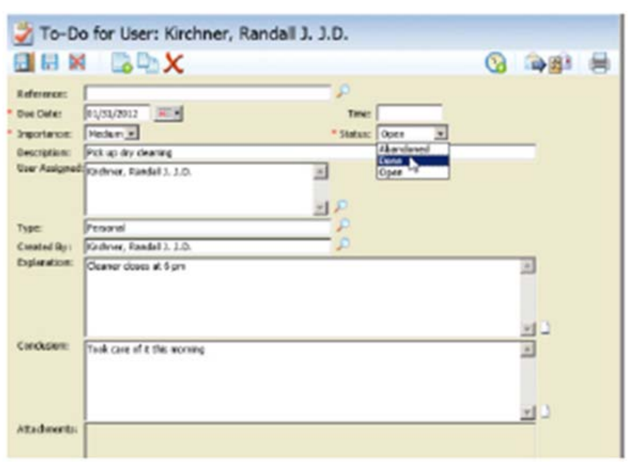
- Any value entered into a **REM Days** window will create a reminder that many whole-calendar days before the date entered into the **Due Date** field.
- Reminders appear in the Heads Up Display only. The icon associated with a reminder is a light bulb icon .
- Reminders are the ONLY item appearing in the Heads Up Display that will *rotate off* the HUD automatically; they only appear on the day they are scheduled to appear. Due to this – assuming the task falls on a weekday – entering REM Days in increments of 7 will almost guarantee they appear in the HUD on weekdays, and will be seen.
- You can set one, two or three reminders. If entering multiple reminders, begin with the box on the left, entering the highest value there. Use the next box for the next lowest value, and the last box with the lowest value, if needed.

Changing the To-Do Status to Done

1. From the Manage My Day view, single click on the **To-Do Detail** icon from the Heads Up pane or double-click on the **To Do** in the To-Dos for panel. Or use the Advanced To-Do Search window to locate and open the To-Do.

The To-Do detail window opens with the To-Do's information.

2. Change the To-Do's status to **Done**.
3. Type *Took care of it this morning*. in the **Conclusion** field (optional).
4. **Save** the To-Do. Because the task is complete, the To-Do is automatically removed from the Heads Up list the next time Heads Up polls for new notices.
   The To-Do will remain on the Manage My Day's To-Dos for panel but with the status changed from Open to Done.



Deleting a To-Do

With the proper security, *Legal Files* allows you to delete To-Do's from the To-Do list views, but does not recommend it.

Do not delete To-Do's. Deleting a To-Do removes your ability to report on the To-Do. For example, you can filter the To-Do Advanced Search list to find To-Do's based on selected criteria (i.e., by status; assigned to or created by user, due date, etc.) and then save and/or print these lists, using the Export to Excel icon at the top of the first column of the To-Do's list. So it is better to use Status to mark a To-Do as Done or Abandoned rather than to delete it.

Because the To-Do you created was a personal To-Do, it is okay to remove it.

1. Find the To-Do you want to remove from the To-Do list view.
2. Highlight the To-Do you want to delete and click on the **Delete** hyperlink that displays in the upper-right corner of the panel.

A pop-up window asks "Are sure you want to delete the current record?"

3. Click **OK** to delete the To-Do or **Cancel** to not delete it and return to viewing the record.

Creating a Referenced To-Do with Reminder Days

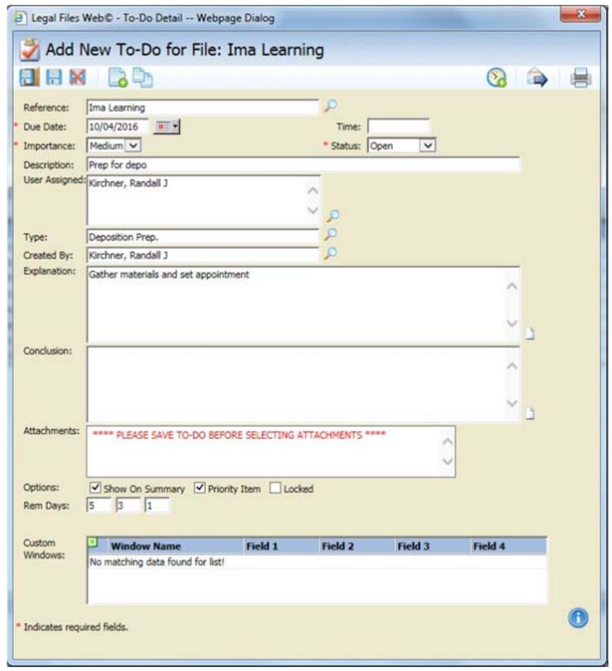
Use Reminder Days to provide advance notice of To-Do due dates. You can specify 1, 2, or 3 reminder days; the To-Do will display in your Heads Up on the specified reminder days, and on the due date.

1. Click on the **Add New** hyperlink from an Advanced To-Do Search.

The To-Do detail window is displayed.

You can create To-Do's for other users in your office. When you create a To-Do for someone else, that person receives a To-Do notification in his or her Heads Up when it is created and also on the day it is due. If reminder days are used then those will also display in Heads Up on those days.

2. Reference the To-Do to the *Ima Learning* file. Remember to use the Magnifying Glass icon next to the **Reference** field.
3. Enter a date, two weeks from today, in the **Date Due** field.
4. Type *4:30 PM* in the **Time** field (optional).
5. Type Prep for depo in the **Description** field.
6. Leave the **User Assigned** field set to you, the logged on user.
7. Enter Deposition Prep in the **Type** field by selecting from the Type pick list.
8. Type Gather materials and set appointment in the **Explanation** field.



*NOTE: Once the To-Do is saved, two icons appear to the right of the Attachments window. If attachments were needed for this To-Do, you can use the top **Select Document** icon to attach documents already saved to the current file, or the bottom **Select Attachments** icon to attach documents currently saved outside Legal Files.*

9. Check the **Show on Summary** and **Priority** Item boxes. Note a **Locked** checkbox is available to prevent a To Do from being altered. Leave it unchecked.
10. Enter 5, 3 and 1 in each of the **Rem Days** boxes. This will cause the To-Do to display in your Heads Up view five, three, and one day prior to the date the To-Do is due.
11. **Save** the To-Do.
12. View the To-Do list for you, the logged on user.

The To-Do you just created is displayed. The red exclamation mark beside the **To-Do Detail** icon indicates a priority item.

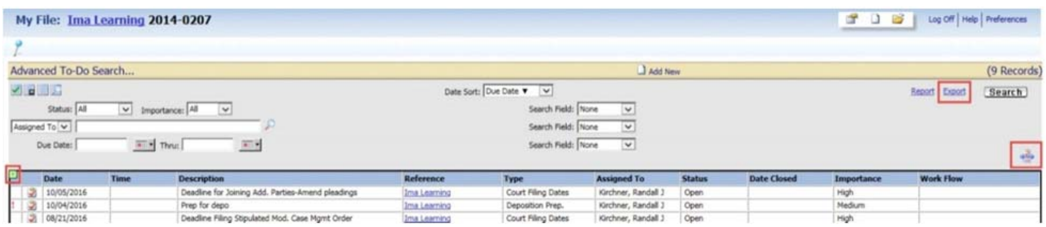
13. Click on the ***Ima Learning*** hyperlink to display the *Ima Learning* file.

14. Click on the **To-Do's** hyperlink under the Actions heading to display the To-Do's referenced to the *Ima Learning* file.

Do you see the To-Do you created?

15. Redisplay the *Ima Learning* file's home page. You can either click on the ***Ima Learning*** hyperlink in the To-Do list or at the top of the *Legal Files* window.
16. Click on the **Transaction Summary** menu item to display the Transaction Summary list for the file. Keep in mind that the hyperlink name (on the menu) may vary, depending on your setup.

Do you see the To-Do you created?



Printing To-Do's, Launching Workflows from To Dos

To print To-Do's from the Transaction Summary (and other list view windows):

- Click the **Export to Excel** icon at the top of the first column . This exports the list of users to Excel, where you can format, sort and print the data.

Or, alternatively:

- The **Export** hyperlink next to the Search button will generate an HTML list of the To-Do's currently shown in the list. You can either **Print** or **Save** that HTML document. If saved it could then be imported into an Excel spreadsheet.

To Launch Work Flows

From this view but only in files, users can launch Work Flows. The **Launch Work Flow Wizard** button is located under the Search button on the right-hand side of the Advanced To-Do Search window. For more information about Workflows, see the Work Flow Wizards section in this manual.

Managing Email

Legal Files Email will serve two primary purposes.

1. First, *Legal Files* Email will be a repository for Email messages that you send and receive using your 'external' Email software (e.g. Outlook, Gmail, Lotus Notes, and GroupWise). *Legal Files* provides plug-ins (or, for Gmail, an extension) for those programs. Once installed you can then save a copy of Email messages into *Legal Files* software, reference the message(s) to specific files (i.e. matters). You therefore have a convenient place to store and track any and all Email correspondence regarding those matters that you are involved with.

To learn more about plug-ins speak to your system administrator or visit the Customer Resource Center area of the *Legal Files* site (www.legalfiles.com) to locate and download documentation describing installation and setup. Or contact *Legal Files* support at support@legalfiles.com or by calling 217-726-6400

2. Second, *Legal Files* Email acts as an internal intranet Email system, letting you send and receive electronic mail messages with other users on your system. These internal Emails can be created manually or automatically as part of Wizard Trigger notifications.

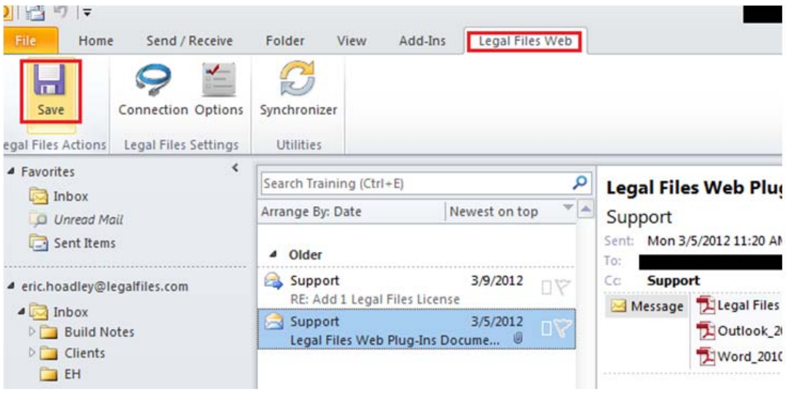
NOTE: When Legal Files Email is not referenced to a file, only the sender and recipient can view it. Referenced Email can be viewed by anyone with access to the file.

Saving an Email into *Legal Files* from External Email program

For Outlook, Lotus Notes and GroupWise:

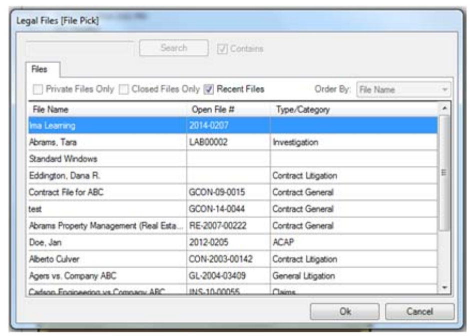
Once the plug-in has been installed you will see a new tab and icons which can be used to save Email messages to *Legal Files*. Emails can be saved to *Legal Files* either individually or multiples (by selecting more than one). In this example one Email is selected (and opened).

For Outlook:



1. Click on the ***Legal Files* Web** tab and the **Save** icon.

The File Pick window is displayed



2. Locate the file (matter) that you want to reference this Email to. In this example **Recent Files** is selected displaying a list of the files you have most recently accessed in *Legal Files*.
3. Either

- Highlight the file to reference and click **OK**.
- Double click the **file** to reference.

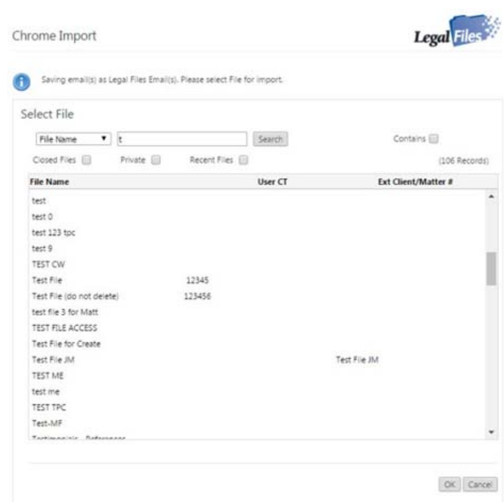
A copy of the Email is saved to *Legal Files*. Separate documentation has more details on the Outlook plug-in. See your *Legal Files* administrator.

For Gmail:

Once the *extension* has been installed you will see a new icon which can be used to save Email messages to *Legal Files*. From Gmail, Emails may be saved to files one at a time, but not in groups.

1. Click the **checkbox** next to an Email, a ***Legal Files*** blue folder icon will appear at the top of the window next to the other Gmail action buttons (image at left, above).
2. Or when you open the Email, a **Save to *Legal Files*** icon appears at the top of the window next to the print icon at the top right of the window (image at right, above).

The Chrome Import window is displayed.



3. Locate the file (matter) that you want to reference this Email to. Recent Files is an option.
4. Either

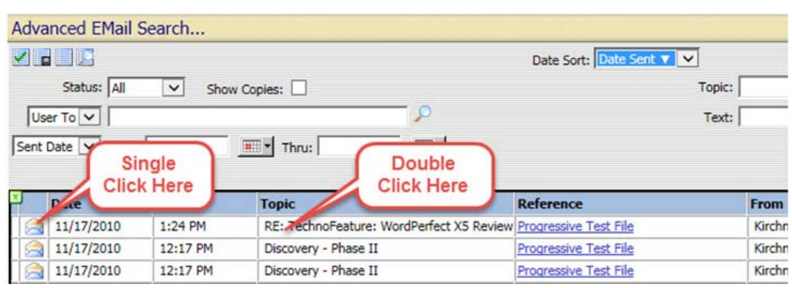
- **Highlight** the file to reference and click **OK**.
- Double click the **file** to reference.

A copy of the Email is saved to *Legal Files*. Separate documentation has more details on the Gmail plug-in. See your *Legal Files* administrator.

Also, separate documentation for the Lotus Notes and GroupWise plug-ins is available. See your *Legal Files* administrator.

Locating and Displaying Email messages

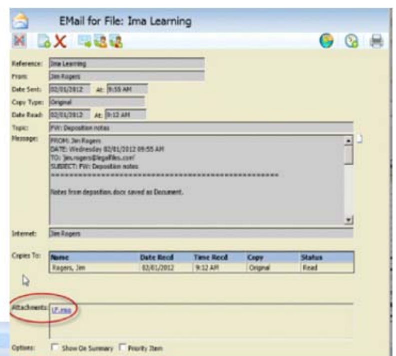
Email messages that have been copied into *Legal Files* from an external Email program (e.g. Outlook, Lotus Notes, and GroupWise) are located using the Email action item and its Advanced Email Search window (just as you would for intranet Emails … discussed later).



You can open an Email by either:

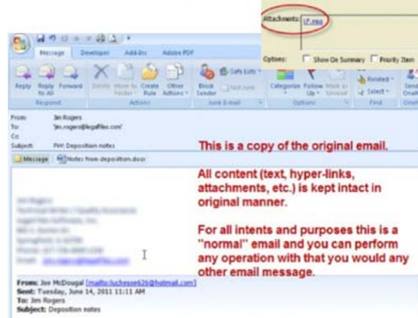
- Double clicking on a **blank area** in the row for the Email message
- Click once on the **Email Detail** icon .

Once opened the Email detail window will display the pertinent information about the stored Email. Notice how the fields are grayed preventing changes to be made.



Displaying the Email in its Original Format

A copy of the original Email and all its content is stored as an **Attachment** to the Email Detail window in *Legal Files*. You can open the original message (even if it has been deleted from the external Email program) by single clicking on the **attachment file** LF.msg. When you do this the Email will open, in the format used by the external Email program (Outlook in this example).

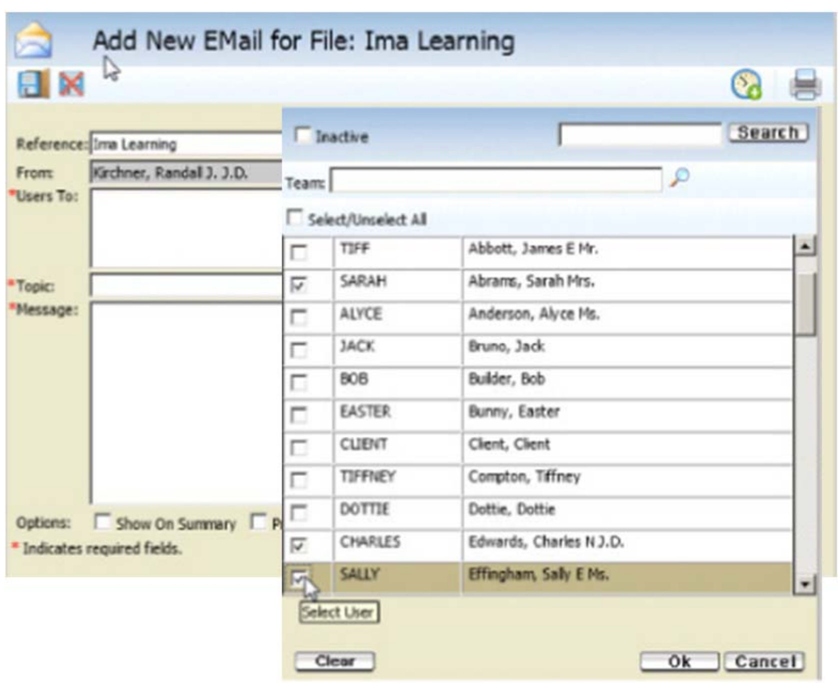


Using Email

Creating Internal Email

The procedure for creating a referenced and non-referenced internal Email is largely the same. In this example, you will create a file-referenced Email from the *Ima Learning* file.

1. With the *Ima Learning* file displayed, click on the **Email** hyperlink under Actions.



2. The Advanced Email Search window is displayed.
3. Click on the **Add N**ew hyperlink. The Add New Email window is displayed.

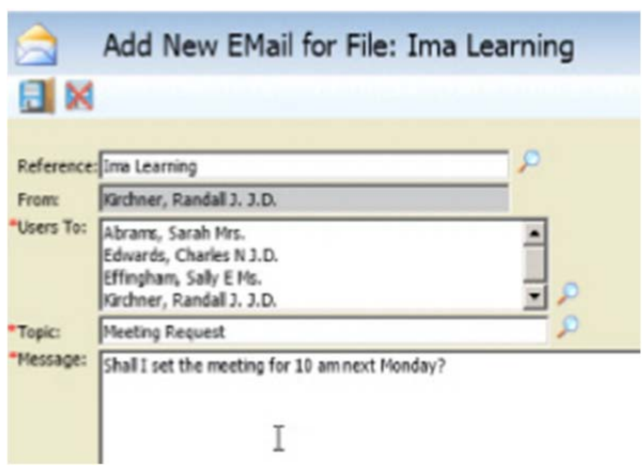
NOTE: Because this window was opened from the Ima Learning file, the file name is automatically entered in the ***Reference*** *field; you can remove the reference or use the* ***magnifying glass*** *icon to select another reference as needed. The* ***From*** *field defaults to you, the logged-on user, and cannot be changed.*

Use this window to address the Email, reference the Email to a file as needed, and type your mail message.

4. Click on the **magnifying glass** icon next to the **Users To** field.

The Users To pick list is displayed, listing all the available interoffice Email recipients.

   a. Select yourself along with some other users (e.g. Sarah, Charles, Sally) by clicking on the **box** next to their name. A check mark will appear in the boxes. You are choosing yourself as an Email recipient so that you can see how Email works from the recipient side. You normally will not do this.
   b. Press the **OK** button to close the list and enter the names in **Topic** the **Users To** field.



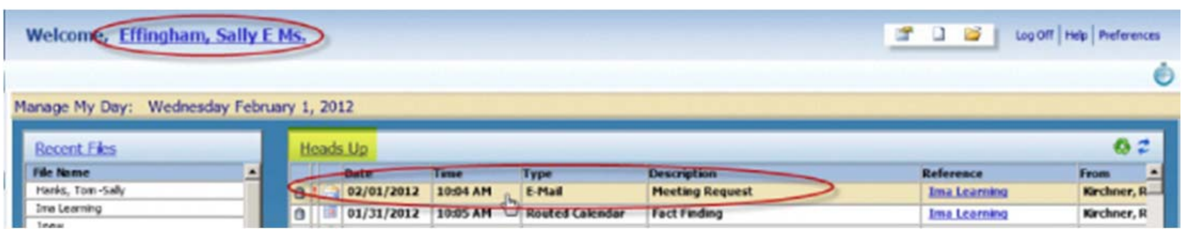
5. Click on the **magnifying glass** icon next to the field. The Topic pick list is displayed. The Topic pick list is provided as a convenience, but you may type an entry directly into the **Topic** field (thus by-passing the Pick List selections) as desired.
   a. Select Meeting Request from the list.
   b. Press the **OK** button to close the list and enter the selection in the Topic field.
6. Type Shall I set the meeting for 10 am next Monday? in the **Message** field.

7. Click on the **Priority** check box, if you want the Email to stand out from others on the list.
8. Press the **Save** button to close the window and send the Email to the users entered in the **Users To** field.

The Email you sent is listed at the top of the Advanced Email Search list when displayed for either My File view, displaying the *Ima Learning* file or from the User view for Sarah, Sally, Charles or (in this case) yourself as well.

9. Click on the **Manage My Day** or **Heads Up** hyperlinks. The Email you sent yourself is listed in the Heads Up list too.

NOTE: This is how the other users would be notified of the Email sent to them.

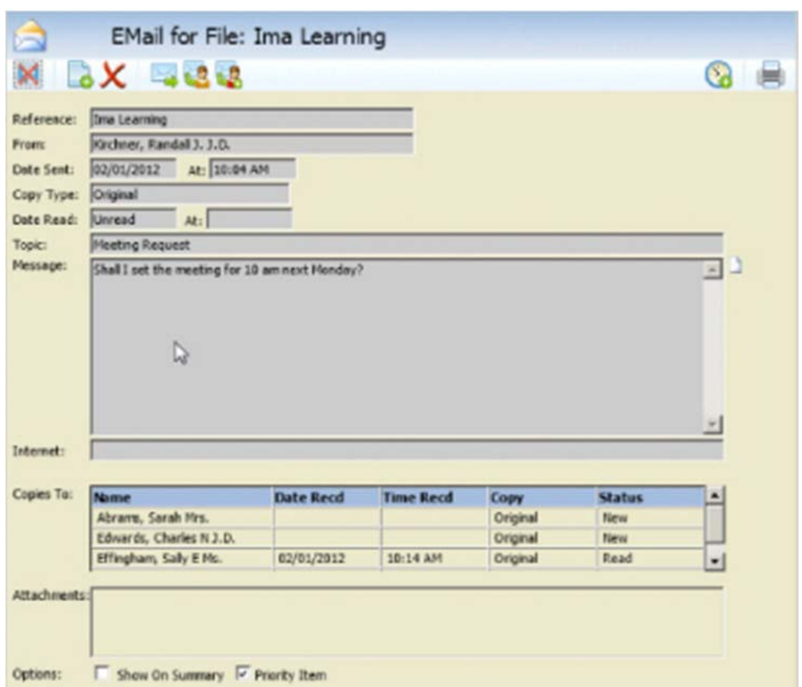


Reading Internal Email

Although much data about the Email is available from its listing, the Email message can only be read by opening the Email.

1. Double click on the **Email Detail** icon  next to your Email listing in the Heads Up list (or from the *Ima Learning* Email list).

   The Email Detail window is displayed.



NOTE: Unlike other Action Item detail windows all but one section are grayed out so that they cannot be changed. Only the ***Show on Summary*** *and* ***Priority*** *check boxes are available for selection.*

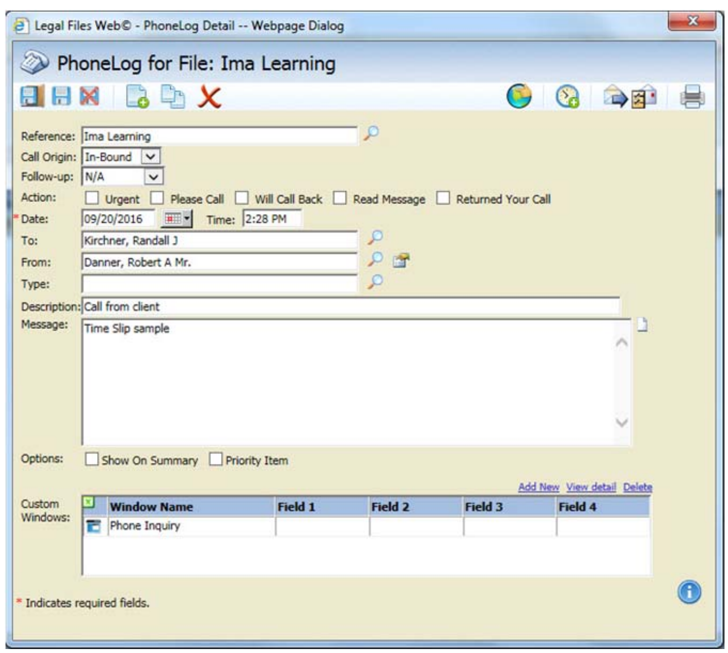
NOTE: See your system administrator about using File Menu Summaries.

Replying or Forwarding Internal Email

Sometimes you want to forward the Email you received to another user or users or reply to the user who sent you the Email or to all the Email recipients. In each case, the contents of the previously sent Email appear in the **Message** field and you have the opportunity to specify the other fields again, including the **Reference, Users**, and **Topic** fields.

1. From the Email detail window, click on one of the following buttons:

- **Forward**. Use this button to forward the Email to another user or users; the **Users To** field is blank. You also can reference the Email to another file.
- **Reply To Sender**. Use this button to send a reply to the user who sent you the Email. For your convenience, the Email sender's name is automatically entered in the **Users To** field, although you can select other users as well. You also can reference the Email to another file.
- **Reply to All**. Use this button to send a reply to all the users who received this Email. For your convenience, the Email recipients' names are automatically entered in the **Users To** field, although you can select other users as well. You also can reference the Email to another file.



2. Press **Save** to send the

Email to the designated recipients, close the window, and return to the Email detail window.

3. Or press **Cancel** to not send and close the detail window.

Managing Phone Logs

Use Phone logs to document incoming and outgoing phone calls for yourself and other users in your office. When a Phone log is referenced to a file, the record is listed in the files Transaction Summary window, the file's Phone Log list as well as the user's Phone Log list.

You can view the file-referenced phone logs for other users, and with proper file-access rights, you can modify and create file-referenced phone logs for other users.

Creating a Phone Log

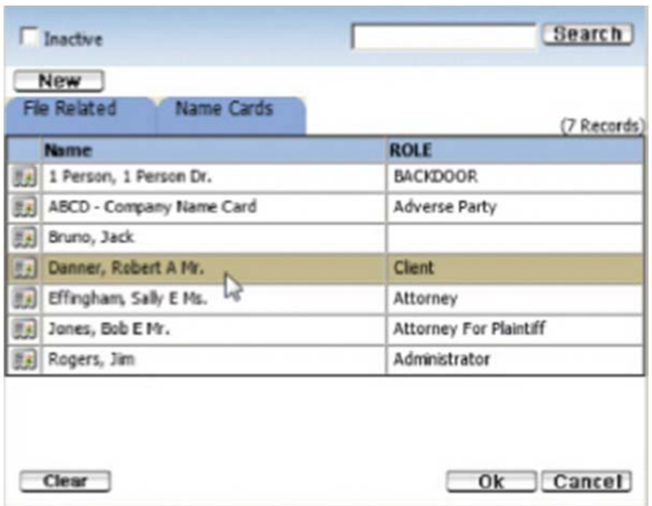
The procedure for creating a referenced and non-referenced phone log is largely the same. In this example, you will create a file-referenced phone log from the *Ima Learning* file.

1. With the *Ima Learning* file displayed, click on the **Phone Log** hyperlink from Actions.

The Advanced Phone Log Search window is displayed.

2. Click on the **Add New** hyperlink. The Add New Phone Log window is displayed.

Notice those fields that are automatically filled by default upon displaying the Add New Phone Log window. All the pre-filled default fields on this window can be changed as needed.



3. Leave the **Reference** field set to *Ima Learning*, the **Call Origin** field set to In-Bound, the **Follow Up** field set to N/A, the **Date** and **Time** fields set to the current date and time, and the **To** field set to you, the logged-on user.
4. Click on the magnifying glass icon next to the **From** field.

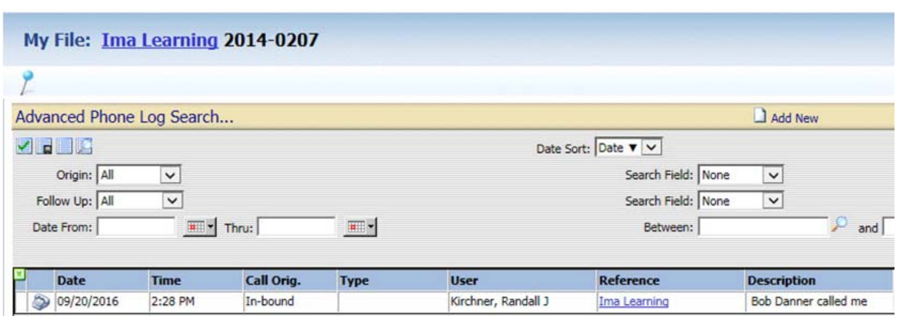
The File Related persons tab is displayed by default, but you can click on the **Name Card** tab to display everyone with a Name Card if needed.

   a. Select Danner, Robert A Mr. from the File Related list.
   b. Press the **OK** button to close the window and enter the selected name in the **To** field.

7. Click on the **Returned Your Call** and **Will Call Back** check boxes.
8. Click on the **magnifying glass** icon next to the **Type** field.
   The Call Type pick list is displayed.
9. Select Information Request from the list.
10. Press the **OK** button to close the window and enter the selection in the **Type** field.
11. Type Bob Danner called me in the **Description** field.

This field is provided as a convenience to allow you to know about the Phone Log contents without opening it.

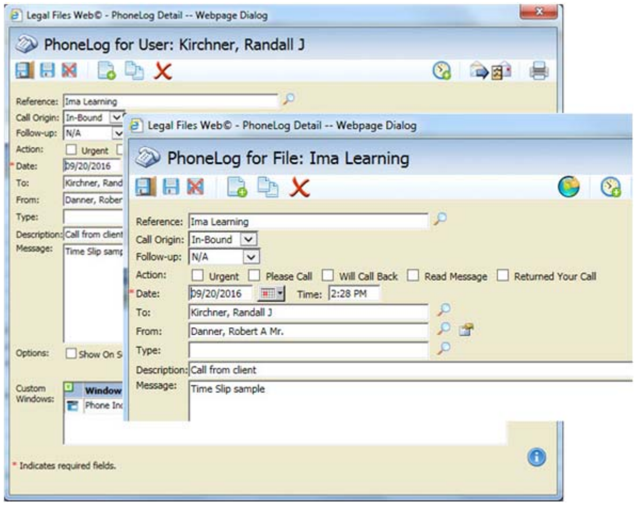
12. Type Called to discuss case, will call back in the **Message** field.
13. Click on the **Show on Summary** and/or **Priority** check boxes if you want the phone log to appear in the file's Menu Summary report and/or be with red ! on when displayed on list(s).
14. Press the **Save & Close** icon to save your entries and close the window.



The Phone Log you created is listed on the Advanced Phone Log Search list of the *Ima Learning* file view and the user-list view of you, the logged-on user.

Priority and Urgent Phone Logs

Phone logs marked as a Priority Item displays with a red !, same as the other priority action items. The Urgent setting functions as a "pink slip;" you might want to use it to help routed phone log messages stand out, but it has no effect on filtering your selection list or reports. If you want to route an urgent message and also be able to filter it as a priority item, consider marking the phone log as Urgent and as a Priority.



Viewing Phone Logs

A user must have file-access rights in order to be able to view a phone log (the same as with viewing other Action items).

1. From either your User or Manage My Day view, click on the **Phone Log** hyperlink or icon.
2. From the Advanced Phone Log Search list, click on the **Phone** icon of the phone log you just created.

The Phone Log detail window is displayed. Notice that because you opened it from a user view, the window heading reads: Phone Log for User, but the phone log still is referenced to the *Ima Learning* file.

3. Close the detail window.
4. From the *Ima Learning* file view, click on the **Phone Log** hyperlink or icon.
5. From the Advanced Phone Log Search list, click on the **Phone** icon of the phone log you just created.

The Phone Log detail window is displayed. Notice that because you opened it from a file view, the window heading reads: Phone Log for File.

Other than the window titles that change according to the view from which it was displayed, the contents of these detail windows are the same and any changes made to a detail window is made in all instances of the window. This holds true for all the Action detail windows.

6. Leave the detail window open.

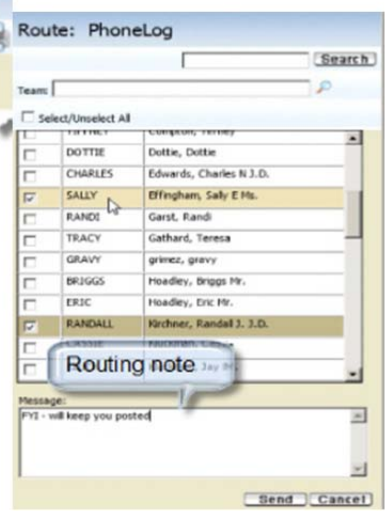
*NOTE: The **Copy** icon will create duplicate phone log records. Using the same **Reference** will duplicate a phone log in the same file; changing the **Reference** will duplicate the phone log in a new file.*

Routing a Phone Log to Another User

Use this procedure to send an existing phone log to another user or users. This routing procedure is the same for all Action items (for which routing is available).

Be sure everyone's Preferences for Note Preview Pane is set to Yes, so that they can view any routed messages that might be entered when routing an action item. See "Establishing Preference Settings" on page 19 for information about setting user preferences.

1. From the open Phone Log detail window, hover your mouse over the **Route** button, and click on the **Route Item**.



The Route Phone Log window is displayed.

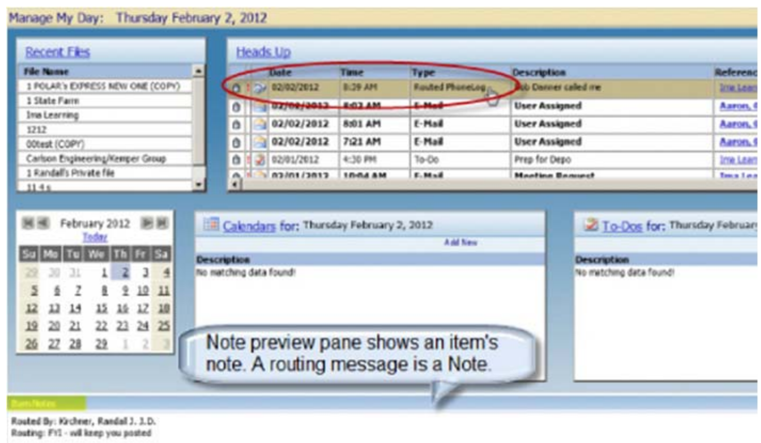
2. Select Sally Effingham and you, the logged-on user, from the list.
   Normally, you would not route an item to yourself, but we do so in this exercise to make it easier to view the routing results.
3. Type FYI -- will keep you posted in the **Message** field. The contents of this field will only display when the recipient's Preferences setting for **Note Preview Pane** is set to Yes.

4. Click on the **Send** button to route the phone log to the designated users and return to the detail window.
5. Click on the **Save & Close** or **Save** to save entries, and send routing.
6. Go to Manage My Day and look at the Heads Up list.

Do you see the routed phone log on the list?

7. Highlight the routed item.

Do you see the routed message in the Item Notes pane at the bottom?



8. Click on the **Phone Log Detail** icon of the routed item to view the contents of the routed phone log.
9. Close the detail window.

Managing Mail Logs

Use Mail Logs to document incoming and outgoing mail. Mail logs can be referenced to a file. File-referenced mail logs can only be viewed by users assigned to the file. File access is also required for the user to create, delete or modify file-referenced mail logs.

Creating a Mail Log

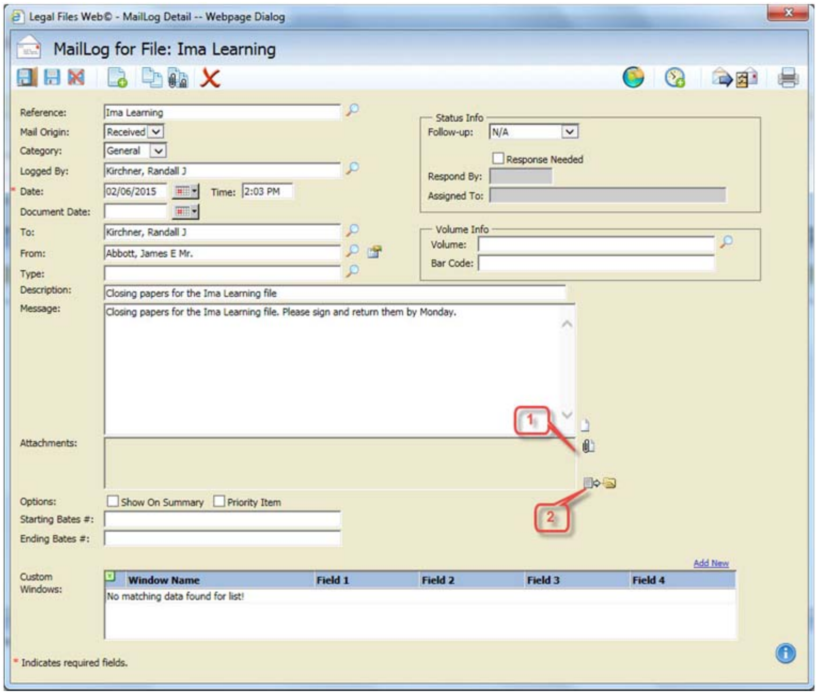
The procedure for creating a referenced and non-referenced mail log is largely the same. Because your Heads Up or Manage My Day view is already displayed, this example will show you how to create a user-based mail log and reference it to the *Ima Learning* file.

1. From your current Heads Up or Manage My Day view, click on the **Mail Log** hyperlink or icon from the Actions menu.

   The Advanced Mail Log Search window is displayed for you, the logged-on user.

2. Click on the **Add New** hyperlink. The Add New Mail Log window is displayed.

   Notice the fields that are automatically filled by default upon displaying the Add New Mail Log window. All the pre-filled default fields on this window can be changed as needed.



3. Leave the **Mail Origin** field set to Received, the **Category** field set to General, the **Date** and **Time** fields set to the current date and time, and the **Logged By** field set to you, the logged-on user.
4. Use the magnifying glass icon next to the Reference field to select *Ima Learning*.
5. Leave the **Document Date** field blank, although this field can be useful if the date of the document being logged differs from the date the mail log is being created.
6. Leave the **To** field set to you, the logged-on user, from the User pick list.
7. Click on the magnifying glass icon next to the **From** field to select a File Related Person (e.g. Robert A. Danner) from the **Name Card** pick list.
   a. Press the **OK** button to close the window and enter the selected name in the **From** field.
8. Use the magnifying glass icon next to the **Type** field to display the Mail Type pick list.
   a. Select Closing Papers from the list.
   b. Press the **OK** button to close the window and enter the selection in the Type field.
9. Checking the **Response Needed** checkbox activates the **Respond By** and **Assigned To** fields. Upon saving this window, data entered into these fields will create a To Do for the Assigned User.

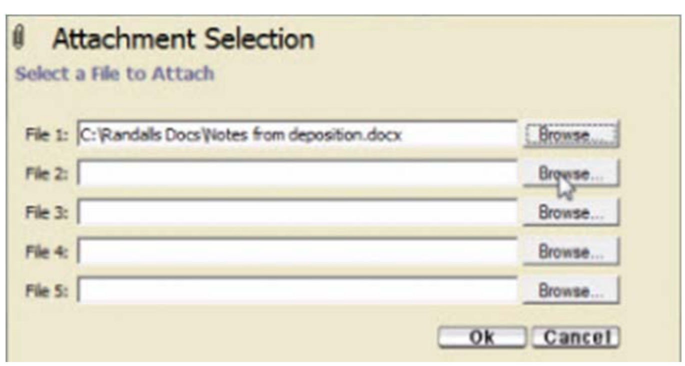
10. Type Closing papers for the *Ima Learning* file in the **Description** field.
    a. The description field is provided as a convenience and is useful to allow you to know about the Mail Log contents from various displays without opening it.
11. Type Closing papers for the *Ima Learning* file. Please sign and return them by Monday in the **Message** field.
    a. This message will be displayed in the Item Notes pane without opening this detail window (if Note Pane Preview is set to Yes in the Preferences window).
12. Click on the **Priority** check boxes if you want the mail log to display on lists with a red ! exclamation mark.
13. Click on **Save & Close** to save entries and close the window.
    a. Or click on **Save** to save your entries. The window remains open, allowing you to add an attachment (e.g. the scanned file of the Mailed item). After attaching item click **Save & Close** to save entries and close the window.

*NOTE: The **Copy** icons*  *will create duplicate mail log records. Using the same **Reference** will duplicate a mail log in the same file; changing the **Reference** will duplicate the mail log in a new file. Users can either **Copy** or **Copy with Attachments** as needed.*

Attachment or Document to a Mail Log

The procedure to add a locally saved file/attachment to a mail log is the same as it is for other Action detail windows that permit attachments. The process is demonstrated here and can be replicated for other action items as well. In the prior image, click on the icon labeled "1" to add an attachment.

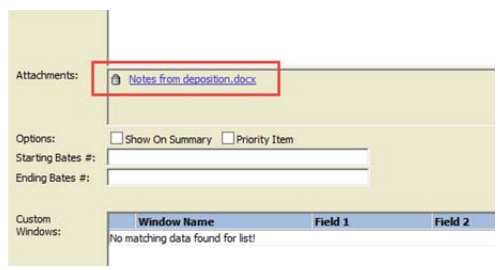
Mail logs also allow you to add a document stored within the same file in *Legal Files*. The process is very similar to the following; instead of browsing out to a locally stored file, you will see a list of documents in the file. In the prior image, click on the icon labeled "2" to add a document. This feature is not available on other Actions.



1. Click on the  **Select Attachments** icon next to the Attachments field.
    a. The Attach Selection window is displayed. Use the **Browse**

buttons on this window to select up to five documents, graphics, or other file types from anywhere on your computer or network.

2. Click on the **Browse** button next to the **File 1** field.
3. From the Choose File window, find the file you want to attach. For example, C:\Randalls Docs \ Notes from deposition.docx.
4. Click on the **Open** button or double click the selected file to insert the file's path location in the **File 1** field.
5. Click **OK** to close the Attachment Selection window and return to the Mail Log detail window. A link to your selected document is listed in the Attachment pane. Click on the hyperlink to open the document or click on the trash can icon to remove the document link from the mail log.
6. Press **Save** to close the window.



The Mail Log you created is listed on the Advanced Mail Log Search list of the user-list view of you, the logged-on user, and the *Ima Learning* file view.

Had you set the **Category** field to Pleading or Discovery, the Mail Log would also be available from the file's Pleading/Discovery window from the files menu items.

Managing Documents

The Advanced Document Search window is used to view, manage, and create document records for a user, Name Card or file. A full discussion of documents, document templates is described in "About Documents" on page 152. Document text searching information is found in "About Wizards" on page 175.

Managing Time Slips

The Advanced Time Slip Search window is used to view, create and manage time slips. When viewed from a file, it lists every time slip associated with that file. When viewed from Users, it lists every time slip associated with the logged-on user. A time slip can also be created from an Action item or from a file's activity window.

A full discussion of Time Slips is discussed in "About Time" on page 143.

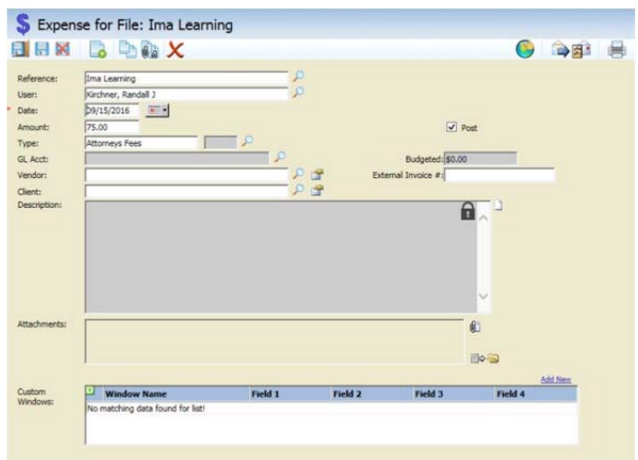
Managing Expenses

Use the **Expenses** hyperlink or icon to record your personal- or file-related expenses. This feature is especially important if you plan to track file expenses or export your expense data to an external time and billing or accounting package. Exporting expense data is beyond the introductory scope of this manual, but this section provides a quick explanation of the Expense detail window.

Some fields shown in the following examples may have been renamed in your *Legal Files* environment.

Creating an Expense Record

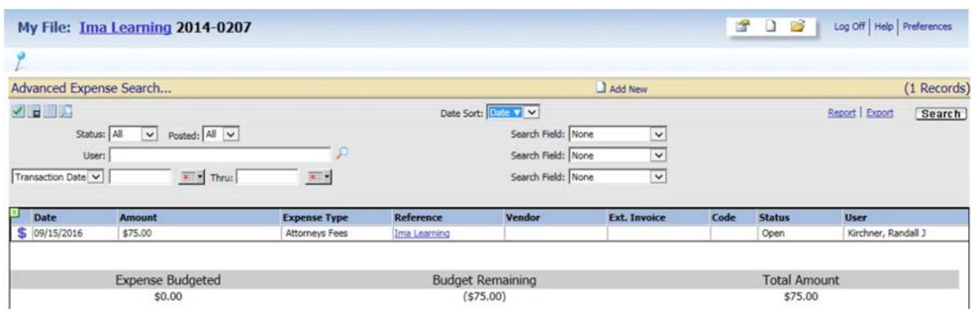
1. Display the *Ima Learning* file
2. Click on the **Expenses** hyperlink or icon to display the Advanced Expense Search window.
3. Click on the **Add New** hyperlink to create a new expense from the Add New Expense detail window.



Notice the fields that *Legal Files* automatically filled with data. The amount in the **Budgeted** field is pulled from the File Setup window. If your office uses file budgets, *Legal Files* will track the posted expenses against the budgeted amounts.

4. Enter 75.00 in the **Amount** field.
5. Use the magnifying glass icon to enter Attorney's Fees in the **Type** field.
6. Use the magnifying glass icon next to the **Vendor** field to select an entity (e.g. person or firm receiving the expense payment). This field can be used in exporting data to some time and billing or accounting programs.
7. Leave the **GL Account** field blank; this general ledger field is useful for those needing to use sub-budgeting.
8. Enter For 30 minutes of file review in the **Description** field.

9. Click **Save** to save your data and make the **Attachments** field available.
10. Two icons now appear to the right of the Attachments window. If attachments were needed for this calendar, you can use the top **Select Document** icon to attach documents already saved to the current file, or the bottom **Select Attachments** icon to attach documents currently saved outside *Legal Files*.
11. Click on **Save & Close** to save entries and close the window.
12. Or click on **Save** to save your entries. The window remains open, allowing you to add an attachment (e.g. the scanned file of the Mailed item). After attaching item click **Save & Close** to save entries and close the window.
13. Find your expense listing in the Advanced Expense Search window.



*NOTE: Because the Ima Learning file uses a budgeted expense, a running total of the **Expense Budgeted**, **Budget Remaining**, and **Total Amount** [used] is displayed after the expense records*

*NOTE: The **Copy** icons*  *will create duplicate expense records. Using the same Reference will duplicate an expense in the same file; changing the Reference will duplicate the expense in a new file. Users can either **Copy** or **Copy with Attachments** as needed.*

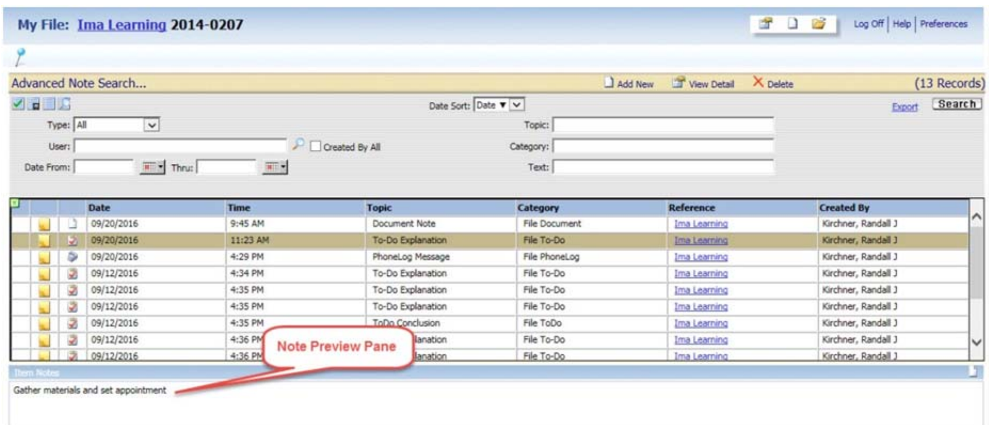
Managing Notes

Use the Notes action item to create and manage file-referenced notes, alert notes, and notes linked to Action Items.

Viewing File-Referenced Notes

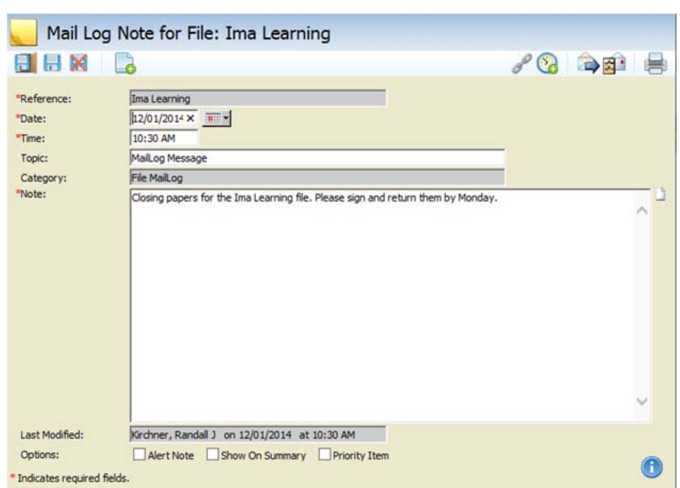
1. From the *Ima Learning* file, click on the **Notes** hyperlink or icon under Actions. The Advanced Note Search window is listed.

NOTE: If you do not have a saved search criteria set up for this search window, remember to click on the Search button to display the list of Notes.



*NOTE: Notice that every listing features a **Note Detail** icon, as well as the icon of the Action item from which the note was created.*

*NOTE: When the **Created by All** checkbox is unselected, users will only see the Notes they have added to a file. Select the checkbox to see all notes saved to a file by all users.*



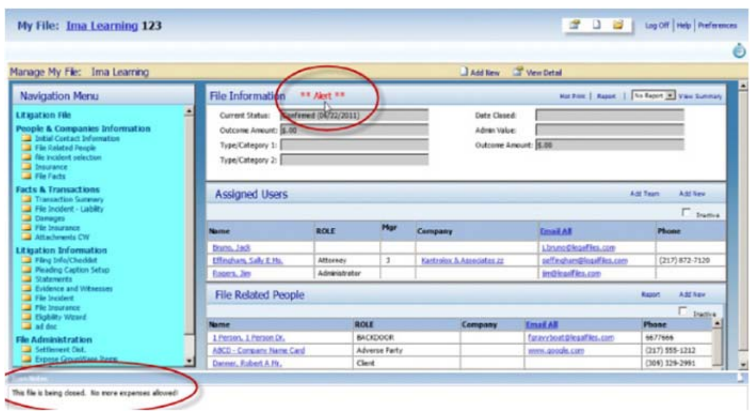
2. Click on the **Note Detail** icon to view the specifics of the note, such as when it was created and by who, as well as the type of note (i.e., Mail Log), category (i.e., File Mail Log), and the text of the note.
3. Click on the action item icon to display the action detail window for which the note originated.

Creating an Alert Note

You can designate a single important note per file. This alert note displays automatically upon opening that file.

A good use of an Alert Note might be to communicate important file or client information to all staff working on the file, or to specify the routing protocol within a given file. For example, the Alert Note might contain information about how the documents or expenses are to be handled for a particular file.

1. Click on the **Note Detail** icon of this recent Expense item for the *Ima Learning* file.
2. Add text in the **Note** field This file is being closed. No more expenses allowed!
3. Click on the **Alert Note** check box.
4. Click on the **Save** button to save your changes and close the window.



*NOTE: Notice the **Note Detail** icon now has a red exclamation mark to distinguish it as an Alert Note .*

5. Display the *Ima Learning* file by clicking on the hyperlink at the top of your page.

*NOTE: Do you see the red flashing Alert? You can view the alert note from its detail window. If the **Display File Home Alert Note** field is set to Yes in User Preferences, you would have you're your Alert Notes in a pop-up window. Also if **Note Preview** field is set to Yes in Preferences, the text of this note will display at the bottom of the window.*

6. Click on the red **Alert** hyperlink to display the Note detail window.
7. Click on the **Save & Close** button to save any changes and close the window.

NOTE: A User Preferences setting determines how Alert Notes are displayed for each user.

About Time

Concept

Legal Files lets you manually or automatically record the time you spend on different activities in a file.

A User Preferences setting determines whether you track your file time manually or automatically. This will be described later in the text.

All time slips are managed by way of the Advanced Time Slip Search window. When time is tracked automatically, a File Activity window automates the time slip creation process by capturing the time segments that you spend in a file. It also allows for quickly creating a time slip from these recorded times.

But when creating a time slip manually from an Action Item detail window, you must log your time, but *Legal Files* will automatically fill in data related to that Action Item.

Legal Files also can track actual time against the time you have budgeted for a case or matter.

Chapter Lesson

In this lesson you will learn how to create a time slip manually and using the automatically recorded time segments from the Activity Timer.

You also will learn to create time slips from an Action Item detail window. You can create time slips from an Action Item whether you are tracking time manually or automatically.

You will learn how to use the File Activity Timer to create time slips for files activity you have recorded on a single or multiple days.

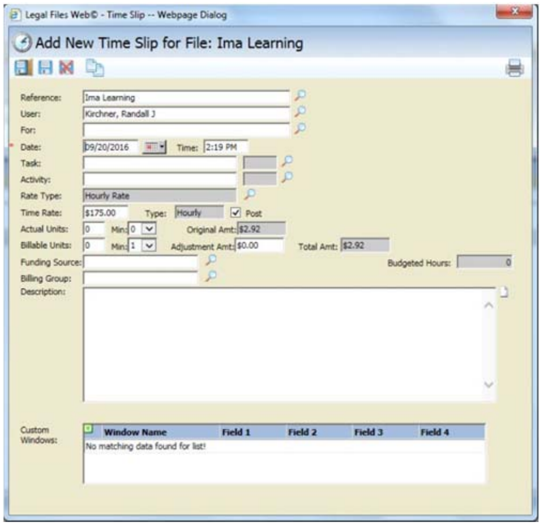
We will also look at how you can search for and manage time slips with the Advanced Time Slip Search window.

Manually creating a Time Slip

Whether you currently have a File open you can create a Time Slip for time you spent working on that file. We will first look at using Time Slip.

1. Open the *Ima Learning* File that you created in an earlier lesson.
2. Under the Actions menu, on the left, select **Time Slip**.
    a. The Advanced Time Slip Search window opens.
3. Click **Add New**.

The Add New Time Slip window opens.



NOTE: Several fields are auto-filled.

- **Reference** because of the file that is open when selecting Time Slip - Add New.
- **User** based on the logged in user.
- **Date** assumes today's date.

You can change any of these to either reference a different File (or no file), a different user, or a different date.

*NOTE: The **Date** field has a red (*) asterisk indicating it is a required field (in order to save a Time Slip).*

- Additionally either a **Reference** or a **User** (at minimum) is required.

Since this is an either/or choice between these two fields they are not each individually marked with an asterisk.

These are default Time Slip settings. However, this window (like many windows in *Legal Files*) is customizable, which is discussed in another section.

4. Leave the three fields (**Reference**, **User**, and **Date**) that are auto-filled as is.
5. Leave the **For** field blank.

This is used to designate this time entry is for a specific party in the File.

Use the lookup icon to select from the list of **File Related People** for this file.

6. Leave the **Task** and **Activity** fields blank.

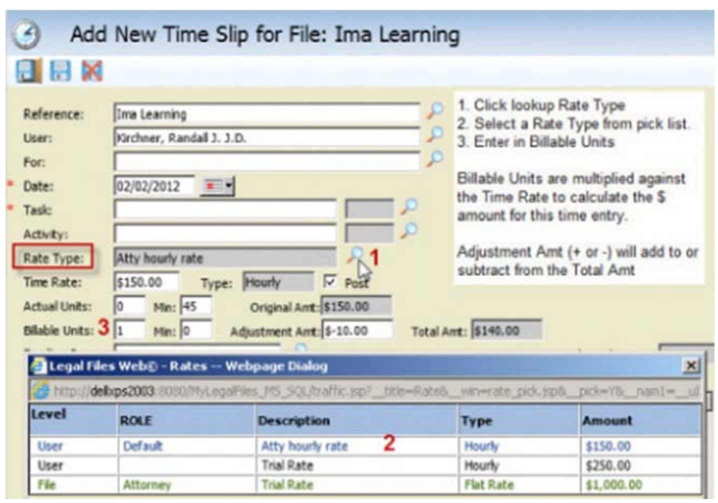
These fields can be used to categorize a time entries. They can be used individually or in conjunction with one another. By default they were designed based on ABA guidelines for time entry. But, like other fields on *Legal Files*, they are customizable to suit the needs of your office or organization. They are also used for filtering Time entry lookups and reports.

Use the lookup icon, to the right of either field, to select from the **Task** or **Activity** pick list.

7. The **Rate Type** field is used if you enter and track rates for time entries. Use the lookup icon to select from the Time Rate pick list.

A Rate Type can be based either on a File Rate or a User Rate. When you use the lookup icon you will see a list of rates to choose from.

If you enter a Rate Type then whatever time is entered will be multiplied against that rate. Selecting a Rate Type will automatically populate the fields for Time Rate and Type.



8. Leave **Post** as it is.

Post is used to make a time entry available for invoicing or for export to an external time/billing/accounting package. Post must be checked in order to either invoice or export.

Post can also be used as a filter for searches and reports.

*NOTE: If there is a check mark already entered for **Post** then the "Auto Post Time Slip" setting is turned on in System Configuration.*

9. Enter 45 in **Actual Units Min:** field. Actual Units is used to enter the actual time spent on the activity.

NOTE: Actual time could be different than Billable time. If using Activity Timer to access this window, this time is automatically filled in. But it can be overridden.

10. **Original Amt** is automatically calculated and populated by multiplying Billable Units against **Time Rate**.
11. Enter 1 in the **Billable Units Hour** field.

Billable Units is used to track the billable time for the activity. The Billable Units time is multiplied against the Time Rate amount, if any, to calculate the dollar amount entered into the Original Amt and Total Amt fields.

NOTE: Billable time could be different than Actual time. If using Activity Timer to access this window the time is automatically filled in. But it can be overridden.

12. **Adjustment Amt** is a dollar amount to adjust (increase or decrease) the calculated **Total Amt.** You can enter either a positive or negative amount.
13. **Total Amt** is calculated by adding the **Adjustment Amt** to the **Original Amt**. This value is used in report totals and is exported to external and billing and accounting packages.
14. Leave **Funding Source** and **Billing Group** blank.

Funding Source and **Billing Group** fields can be used to categorize time entries. They can be used individually or in conjunction with one another. By default they were designed based on ABA guidelines for Legal Services time entry. But, like other fields on *Legal Files*, they are customizable to suit the needs of your office or organization.

They are also used for filtering Time entry lookups and reports.

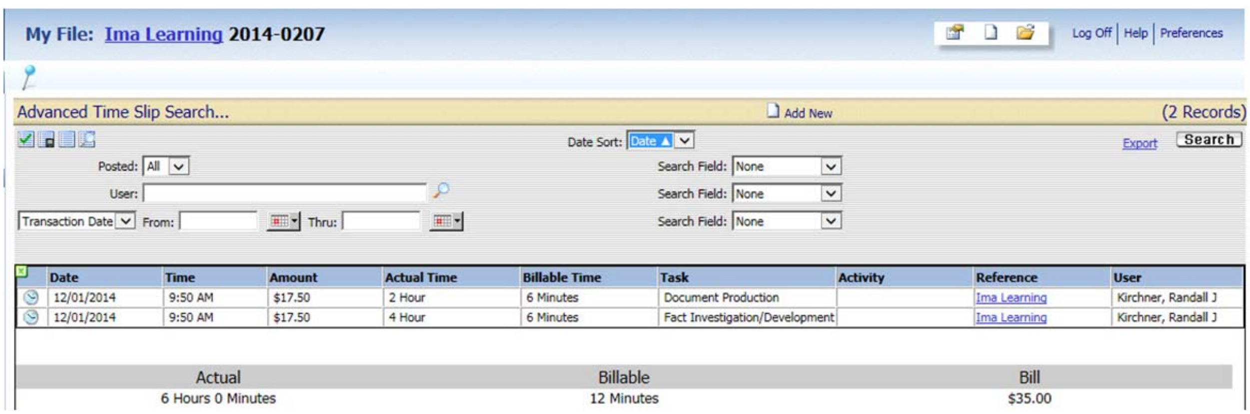
Use the lookup icon, to the right of either field, to select a Funding Source (e.g. LCS Funding) or Billing Group from its pick list.

15. Leave **Budgeted Hours** blank. The amount shown here comes from the entry in the Budgeted Hours field on the File Setup (i.e. File Detail) window of the file entered in the Reference field on this time entry.
16. Enter in a **Description** for the Time entry.
17. Click **Save & Close** icon to save your entries and close the window

Viewing Time Slips

From the Advanced Time Slip Search window you can locate, view, modify, add and delete time entries.

1. Open the *Ima Learning* file, click on the **Time Slip** icon under the Actions menu. The Advanced Time Slip Search window is displayed.



2. You can either use the scroll bar, on the right, to scroll to the bottom of the Advanced Time Slip. Search list to find the time slip you last created. Or you can use the various filters on the Advanced Time Slip Search window to locate it.

NOTE: When you have scrolled to the bottom of the list a bar along the bottom of this view tracks the total amounts for Actual and Billable hours and totals the billable amount.

- In the logged-on user view, these amounts apply to time entries for the user across one or more files.
- In the file view, they apply to time entries for that file only.

3. Double-click on any time entry in the list to open its detail window. Make any changes if you desire. For instance, you can **Copy** a Time Slip into the same file to record repeated

effort in the same file, or to another file (by changing the Reference field) to record similar efforts for different files.

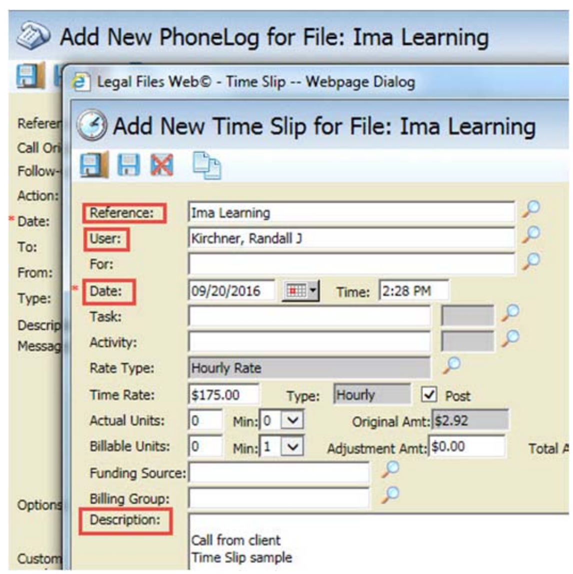
4. **Save & Close** that window.

Creating a Time Slip from an Action Item

Whether tracking time automatically or manually, you can create time slips from an Action item's detail window (all except Expenses). When creating a time slip from an Action item detail window, *Legal Files* automatically enters as much data as possible from the Action item, but you must log your own time.

1. From the *Ima Learning* file, click on the **Phone Log** hyperlink or icon under Actions menu.

The Advanced Phone Log Search window is displayed.



2. Click on **Add New**. We will create Phone Log and then create a Time Slip from it.
3. On the Phone Log Detail window type something into the **Description** field (e.g. Call from client). Also type something into the **Message** field (e.g. Time Slip example).
4.  Next click on the **Time Slip** icon, in the upper right hand corner of the Phone Log window. The Add New Time Slip window is displayed

Notice *Legal Files* has automatically filled in as much data as it can from the existing phone log, (Reference, User, Date and Description) but you will need to enter your time.

5. Follow the procedures outlined previously to finish creating the time slip.
6. Save the data entered in the Time Slip Update window.

About Time

NOTE: Time Slips created either manually or from automatically tracked time are both displayed in the Advanced Time Search window the same. There is no distinction made between the two methods of tracking time.

Using the File Activity Timer

When the **Use Web File Activity Timer** field is set to Yes or Prompt in the Preferences window, the File Activity Timer icon, which looks like a watch, displays in the upper right of the interior window. The File Activity Timer records the time you spend in a file from when you open the file display until when you close it. Using the File Activity window, you can view your file activity time and create a time slip based on the total time spent in file(s) that has been accumulated through that point in the day.

Alternately, you can create a time slip from an Action Items detail window (see description above) regardless whether you track time automatically or manually.

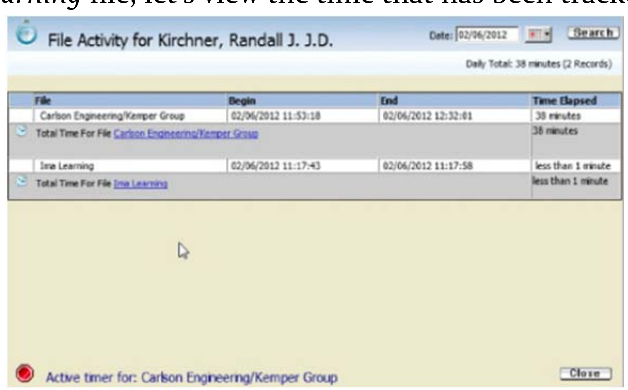
For information about your Preferences settings, see "Establishing Preference Settings" on page 19.

Viewing File Activity

Use the File Activity Timer to automatically record the time you spend in a file. Click on the **File Activity Timer** (watch) icon to display the File Activity window. This window lists the file activity time for the specific logged-on user.

The File Activity Timer can track the time spent in multiple files, pausing and resuming as different files are accessed and exited. The timer records and totals up the time spent in file(s) up through that point in the day; the totals do not carry over into weekly or monthly totals.

Because we have been in and out of the *Ima Learning* file, let's view the time that has been tracked on its file activity.



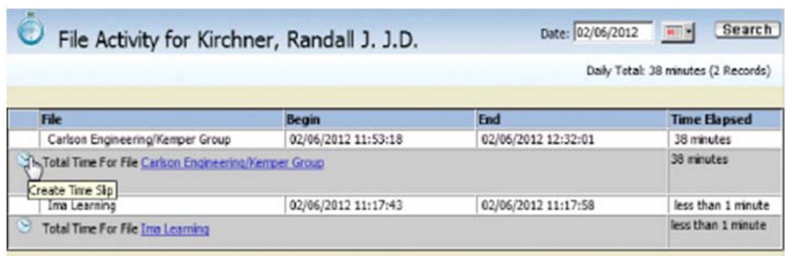
1. Click on the **File Activity Timer** icon above the title bar of the file display.

The File Activity window is displayed. The time is tracked by day, and displays time for a particular date.

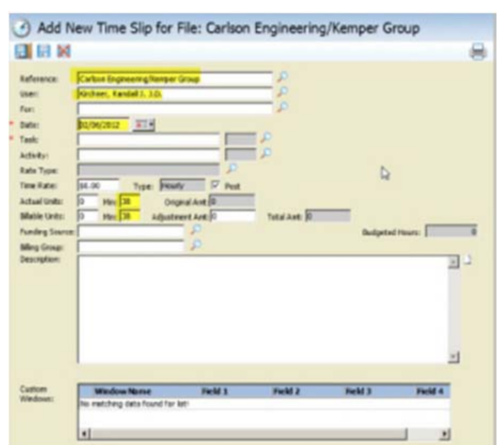
2. To see time activity for a different date, click on the **Calendar** icon next to the date field, and select a previous day's date.
3. Click on the **Search** button to find the records for that date. (Remember to click on the Search button).
4. Return to today's date. Keep the File Activity window open to create a time slip.

Creating a Time Slip from the File Activity Timer

The process to create a time slip is the same regardless whether you track time automatically or not. When tracking time automatically, however, a number of fields on the Add New Time Slip window are automatically entered, including the Billable Units field, which is filled with the amount of total file time for the date.



1. With the Activity Timer window open click on the **Create Time Slip** icon. The Add New Time Slips window is displayed.
   a. Notice the time recorded for the file, in the Time Elapsed column is automatically entered in the Actual and Billable Units fields, but you can change the amount as needed. Also the File name, user and date fields are auto-filled.
2. Leave the auto-filled fields entered as is.
3. Fill in the other fields as needed.



As an example you could:

4. Use the **Task** lookup to enter Discovery Document Preparation.
5. Enter Case Review in the **Activity** field. Again, remember to use the lookup icon to select your activity from the pick list.
6. In the **Time Rate** field you can manually enter a rate of $150.00 and leave the **Type** field at Hourly.

NOTE: You could use the ***Rate Type*** *lookup and select a rate to use for this time. Rate types are established by your system administrator.*

7. Leave the **Actual** and **Billing** fields set as they are (i.e., 13 in the Billing Units field).

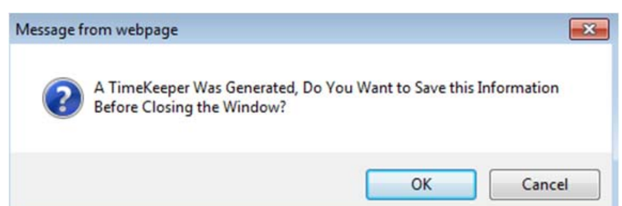
NOTE: Sometimes you cannot bill for all the time you spend in a file, but you still want to record the full time devoted to the file. For that reason, Legal Files allows you to track both actual and billable time.

8. Enter any information that will help you recall your billing activity in the **Description** field.
9. Click on the **Save** button to close the Add New Time Slips window and return to the File Activity window.
10. If you had been working in multiple files, you could select another file from the File Activity window and create a time slip for that file.

NOTE: If at a later point, in the same day, you use the ***Create Time Slip*** *for this same file it will include the above entered time along with any additional time spent in the file. In other words the activity timer is keeping a running total of time for that file for that day and creates Time Slips based on the total daily time.*

Setting File Activity Timer to "Prompt"

You can configure *Legal Files* to remind you to enter a time slip every time you close a file, by setting the **Use Web File Activity Timer** field to Prompt. For information about your Preferences settings, see "Establishing Preference Settings" on page 16.



With this setting, every time you close a file, you will be asked if you would like to enter a time slip.

1. Click **OK** to open a time slip window.
   a. The reference and amount of time the file was open will feed into the both the **Actual Units** and the **Billable Units** fields.
   b. Enter in the other information you require.
   c. Click the **Save & Close** icon to close the time slip.
2. Click **Cancel** to bypass the time slip window.

About Documents

Concept

Document Generation lets you automatically create a document within a file, using data from Legal Files, Name Cards and system. These generated documents are based on templates, or model documents, designed to pull in specific information. The template can be used to generate documents in any file, but the document you generate from that template is unique to the file for which it was generated.

Document templates use a combination of text and tokens. Tokens are like merge fields or placeholders for data (e.g. Name, Address, Matter #) which will be inserted when the document is generated. If there is no data in the field referenced by the token, the token will return a null value (****). Although you can manually enter text in place of the null values, it is best to fill in the fields of data on your files as complete as possible to ensure that Legal Files has data to place in appropriate tokens.

Usually, at least one person in your office has been designated as Template Coordinator. This person (or team of people) is responsible for designing the templates used in Document Generation and for training users how to use the templates. This Introduction to Legal Files training guide provides general information about generating documents from templates within Legal Files. Specific information about designing, creating, and using document templates is available in the Document Generation training session.

Chapter Lesson

In this lesson you will learn how to generate a document from a template, how to copy a document within a file or from one file to another, how to copy a document into Legal Files, and how to create a blank document.

Managing Documents

Client Tools and Documents

In User Preferences, the Client Tools tab setting affects your how you can edit documents saved in Legal Files. For details on how to set this control, see "Establishing Preference Settings" on page 19.

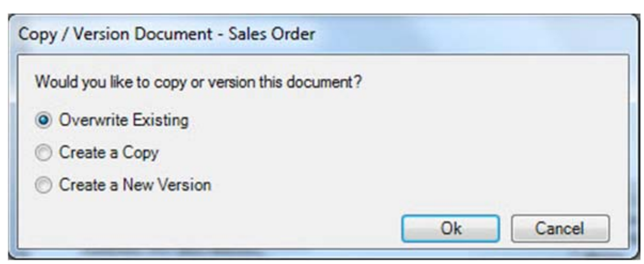
The options in Client Tools are:

- **Don't Prompt**
- **Prompt – Overwrite**
- **Prompt – Create a Copy**
- **Prompt – Create a New Version**

If your preferences are set to **Don't Prompt**, the only way to update the original document saved in *Legal Files,* copy it, or version it are detailed in the following pages of this *About Documents* section.

If, however, your preferences are set to any of the three other options, this section explains how Client Tools affects *Legal Files* documents.

1. Click on the hyperlink name of the Initial Letter document in the *Ima Learning* file. The document opens in Microsoft Word.
2. Make any edit to the document, then click the **Legal Files Web** tab in Word, and the **Save** icon on the ribbon below the tabs. The Client Tools window appears.
3. The selected radio button is controlled by your User Preferences settings. In the image at right, User Preferences were set to **Prompt – Overwrite.** Clicking the **OK** button will now overwrite the original document.



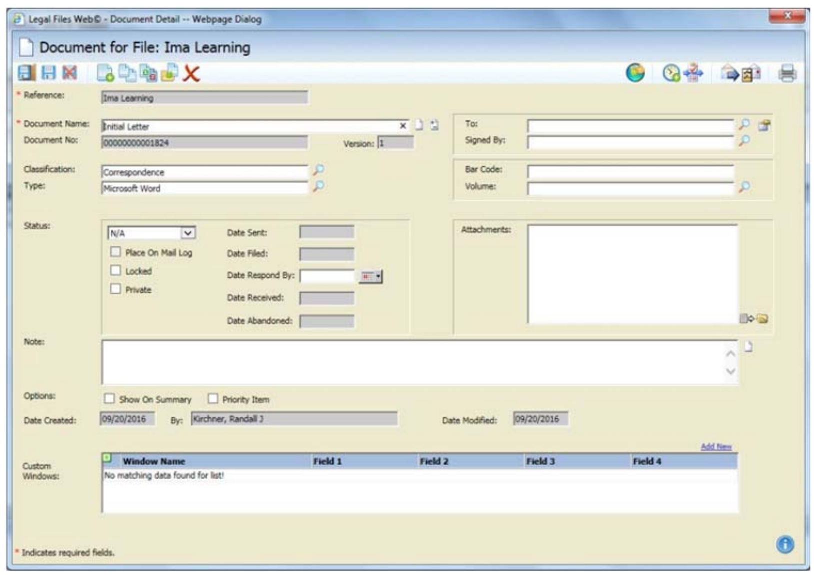
You can also select either **Create a Copy** or **Create a New Version** as needed. This would override your default setting and create a copy or a version of the original document.

About Documents

Using the Document Detail Window

For every document, a Document detail window also is generated. This window is available from the **Document Detail** icon on the Advanced Documents Search list.

Use this window to manage your document. From the detail window, you can display the document, lock the document to prevent it from being edited, place it on a mail log for tracking purposes, make a note about the document, route it to other users, create a document copy, and save another version of the document.



1. Click on the **Document Detail** icon for the Initial Letter listing of the *Ima Learning* file. The Document detail window is displayed.
2. Click on the **Document** icon next to the **Document Name** field to display the document.
3. Close the Word window without making or saving any changes to return to the Document detail window.
4. Complete these fields as needed:
    a. Use the **Classification** and **Type** fields to categorize the document in *Legal Files*. Your administrator will let you know your office requirements for these fields.

    b. Use the **Status** fields to help track document-delivery information as follows:
        1) Select **Mailed/Sent/Filed** from the drop-down list to create a mail log for the document and mark the document as Mailed/Sent/Filed.

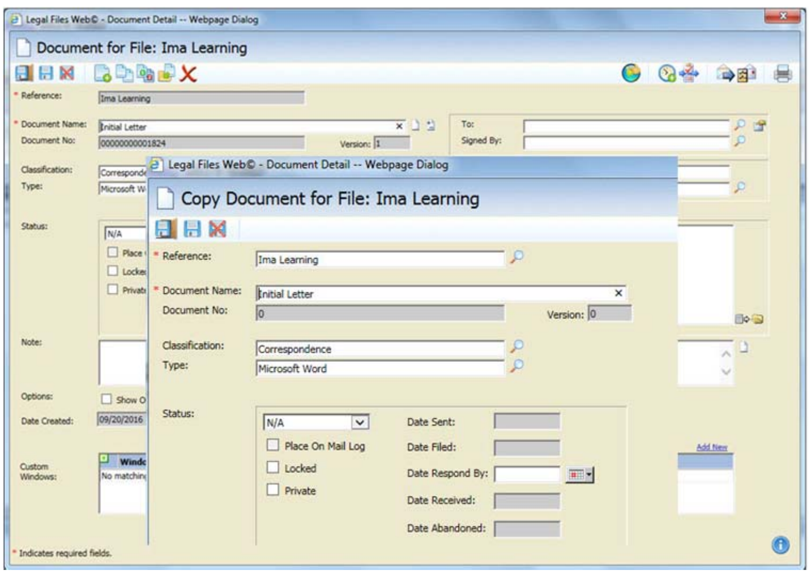
2) Notice the fields that are automatically filled in by default upon making that selection. You can override any of these fields as needed.
3) Re-select **Mailed/Sent/Filed** from the drop-down list.

c. Click on the **Show Summary** check box to include this document on any file menu summary reports generated for this file.

5. **Save & Close** the Document detail window.
   a. The Advanced Documents Search window is redisplayed.
6. Click on the **Mail Log** hyperlink or icon in the Actions section to display the Advanced Mail Log Search window. Do you find the listing for your letter?

Create a Copy from the Document Detail Window

Use the **Copy** button on the Document detail window to create a copy of the document. Creating another copy of the document, allows you to either make changes to one copy without affecting the other and keep both copies in the same File or else change the File reference for the copied document and 'move' it to another File. This is particularly useful when drafting documents for review; you can easily create several copies of the same document, which then are edited differently. Upon approval, just delete the copy(s) you no longer need. To Copy a document:

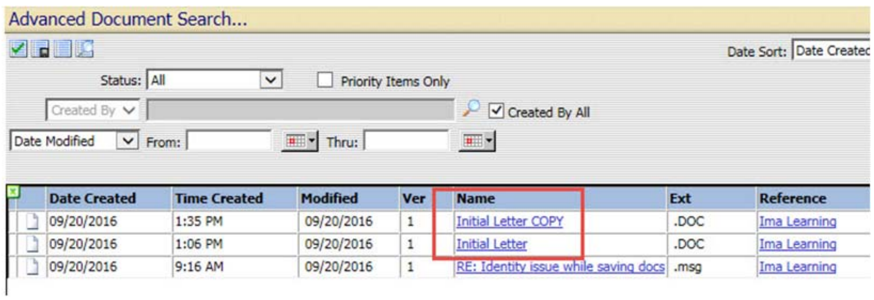


1. Display the Document detail window for the Initial Letter.
2. Click on the **Copy** button.
3. New Document detail window is now displayed. All the fields remain the same except the version number field now reads 0 instead of 1.
   a. You can change the file named in the **Reference** field.
   b. You can change the Document Name. In this example we changed the document name.

Make any changes you want or leave it as is.

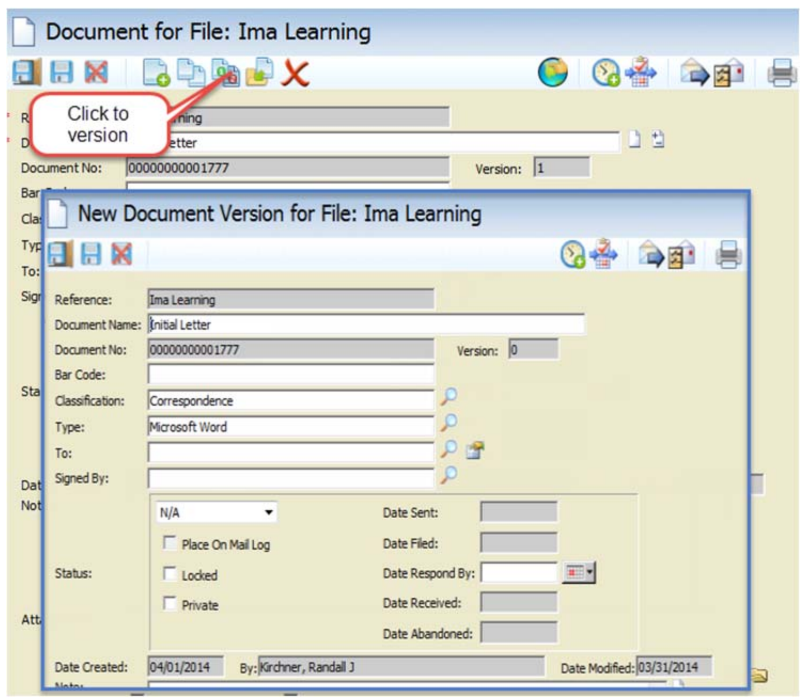
4. Click on the **Save & Close** button to close the detail window and return to the Advanced Document Search window.

NOTE: Notice there are now two copies of the same document. Attachments on the original Document detail window, are included in the copied document.



Create a Version from the Document Detail Window

Use the **Version** button on the Document detail window to create a copy of the document, which then is saved with a different version number. Creating another version of the document, allows you to edit one version of the letter without affecting the other. This is particularly useful when drafting documents for review; you can easily create several versions of the same document, which then are edited differently. Upon approval, just delete the versions you no longer need, if allowed.



To use the Copy/Version Document Wizard:

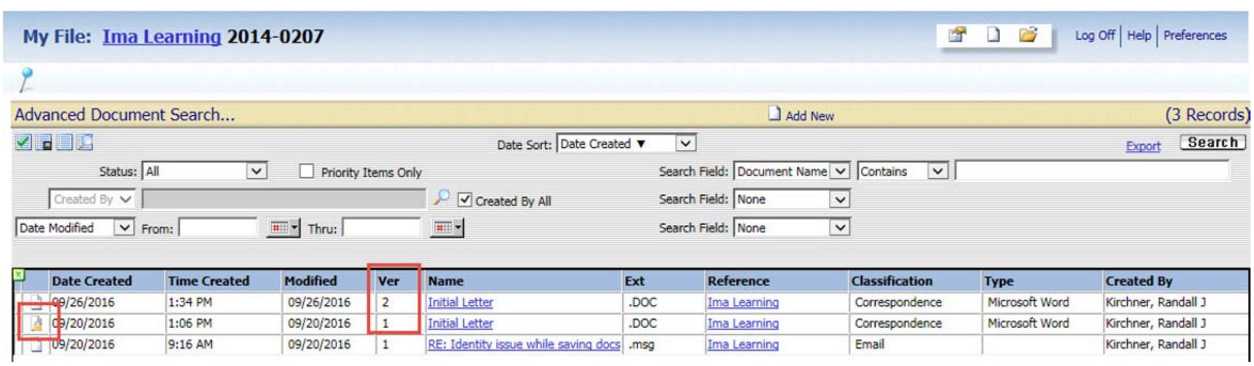
1. Display the Document detail window for the Initial Letter.
2. Click on the **Version** button.

3. A New Document detail window is now displayed. All the fields remain the same except the Version number field now reads 0 instead of 1. Although you can change the document name, it is better if you do not so that the two versions can be more easily found together. Each document will have a distinct version number, making it easy to tell the documents apart, despite the same name.
4. Make any changes you want or leave it as is.
5. Click on the **Save** button.

   The Document detail window remains displayed. Notice the **Version** field now displays a 2.

6. Click on the **Save & Close** button to close the detail window and return to the Advanced Document Search window.

- Notice you now have two versions of the same document. Attachments on the original Document detail window, are included in the versioned document.
- Also the **Document Detail** icon, on the Advanced Search window, has changed slightly to indicate that this is a locked document.



Locking Documents

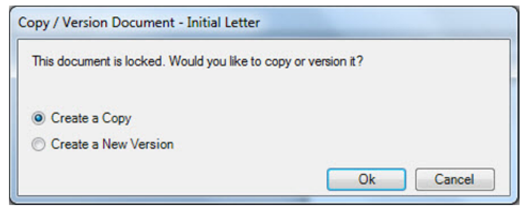
There are two ways to lock a document.

- **Version it,** as described above. When a document is versioned the existing copy/version is automatically locked to prevent editing changes to be saved in that locked version.

NOTE: The lock accomplished via versioning is permanent. In other words, the locked copy/version cannot be unlocked.

- **Lock it.** On the document detail window, there is a check box to lock a document. Once checked, that document is locked.

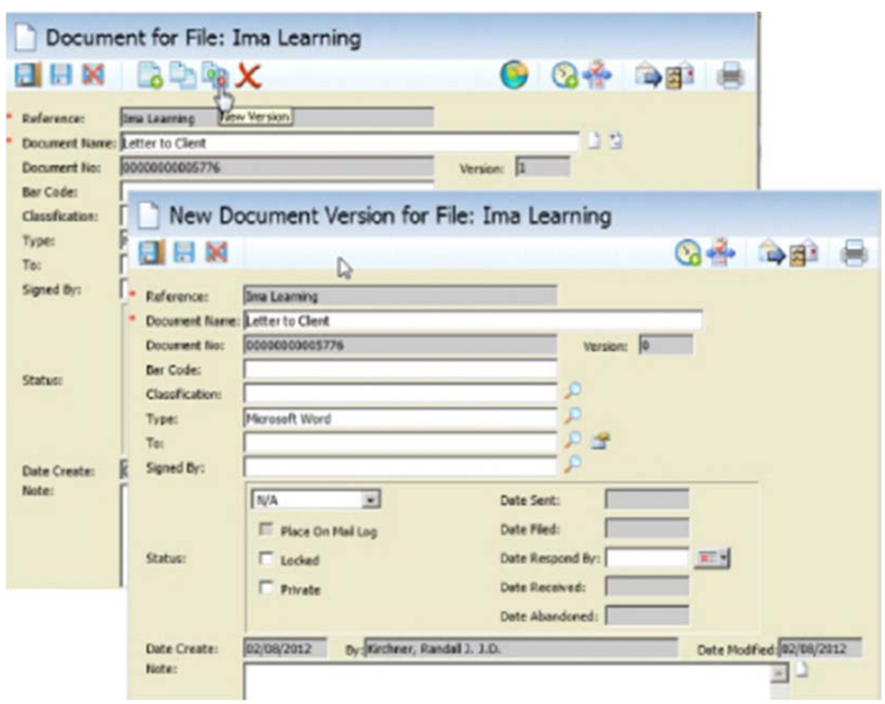
If a locked document is opened and changes are made, when the user attempts to save it, he will get a message prompting to either **Create a Copy** or **Create a New Version** in order to save it.



Move the Document to Another File

Use the Move button on the Document detail window to transfer the document to another file in *Legal Files*, which then is saved with a different document number, and with today's date as the **Date Created** and **Date Modified**. This is especially useful if a document has been inadvertently saved to the incorrect file.

To use the Move Document Wizard:



1. Display the Document detail window for the Letter to Client.
2. Click on the **Move** button.
3. New Document detail window is now displayed. All the fields remain the same except the version number field now reads 0 instead of 1.
   a. You can change the file named in the **Reference** field to move the document to another file.
   b. You can change the **Document Name**.

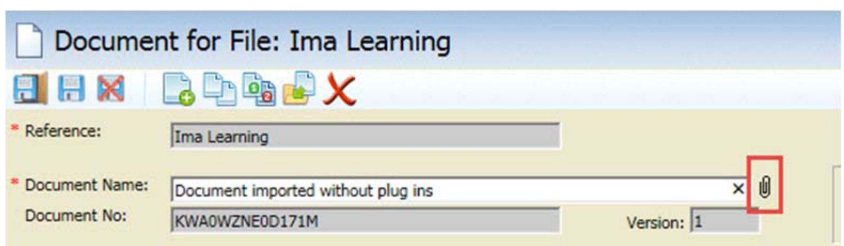
Make any changes you want or leave it as is.

4. Click on the **Save & Close** button to close the detail window and return to the Advanced Document Search window. The document is no longer listed in this file as it has been moved to the new file. Attachments on the original Document detail window are included in the moved document.

Importing Documents

Documents of any file type (Word, Excel, PDF, images, etc.) are most commonly imported into *Legal Files* through the Drop Zone on a user's computer or as an Add-In to software programs (See *Legal Files 9.2 – Drop Zone* documentation for more information). But documents can also be imported into *Legal Files* without the use of the Drop Zone or Add-Ins.

1. From the *Ima Learning* file, click on **Documents** in Actions, and click the **Add New** button in the tan bar.
2. The Document Detail window appears. In the **Document Name** field, type Document imported without plug ins. Click the **Save** icon (not **Save & Close**).
3. To the right of the **Document Name** field is the **Attach Primary Document** icon. Click and browse out to a document on your computer. Click **OK** when done.



4. Click **Save & Close** to complete the import. On the Document Selection window, the new document's name appears as a blue hyperlink, just like the document created through Document Generation or documents imported through the plug ins.

Date Created	Time Created	Modified	Ver	Name	Ext	Reference
09/27/2016	1:37 PM	09/27/2016	1	Document imported without plug ins	.docx	Ima Learning
09/26/2016	1:34 PM	09/26/2016	2	Initial Letter	.DOC	Ima Learning

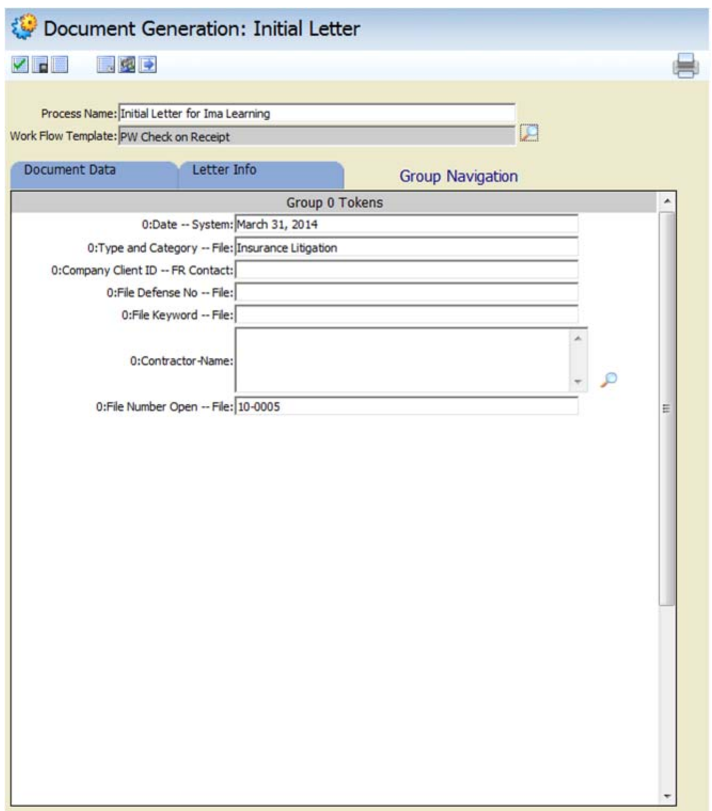
Document Generation

Generating a Document from a Template

Document templates are model documents that use token placeholders to extract specific information from a file, Name Card, or system. Although every document template is available to every file, the document, once created from a selected template, is unique to the file in which it was created. Document templates are created by your *Legal Files* administrators.

Documents are generated from the Doc Generation hyperlink or icon in the Actions section. Although this hyperlink or icon is available from the My Day, My Files, and User views, you can only generate documents when you are in the My Files view.

1. Open a file, such as *Ima Learning*
2. Click on the **Doc Generation** hyperlink or icon on the Actions menu. This will display the Advanced Document Template Search window or Template Tree view (depending on Preferences setting), listing the various document templates.
3. Use the search window to locate the Initial Letter template.
4. Double click on that template name or single-click on the Document icon in left column.



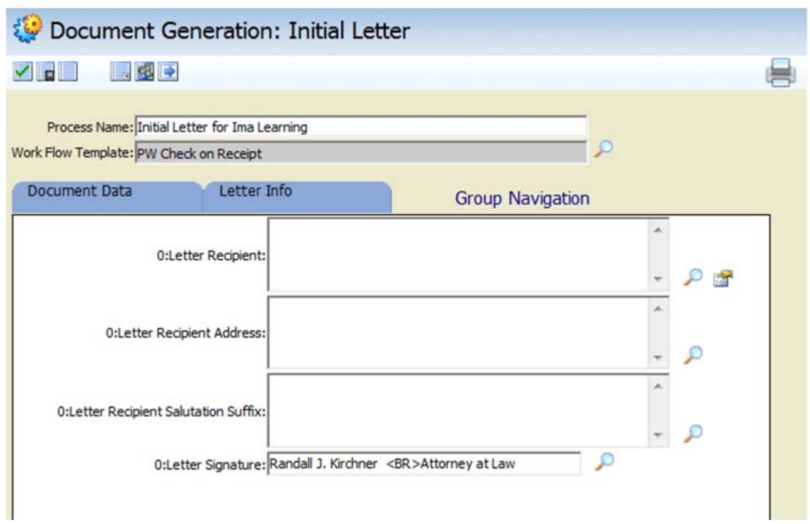
The Document Generation window displays for Initial Letter.

The Document Data tab displays the file-and system-specific tokens that were defined on the template. In our Initial Letter example, the Document Data tab includes the Date, File Name, a Company Name

Card Contact, Defense Number, Keyword, a File Related Person's name, and the File number.

In this example, some of the token data are auto-filled (System Date & File Name & number). Even so, you can override the auto-filled data by either typing a different value (text, date, etc.) into any token field in the Document Generation window or by using the lookup icon to locate and select different data, as needed.

5. Use the lookup icon to see the list of File Related People to select from. Notice how, after selecting a file related person, the Name and Address data are both filled in.
6. Click on the **Letter Info** tab.



The Letter Info tab contains the token fields related to letter, such as salutation and letter recipient. Although all templates will have a Document Data tab, not all templates will have a Letter Info tab.

The Letter Info tab is only available on templates that use letter-tokens.

Choosing Token Values and Generating the Document

A token may not have retrieved data for any of three reasons: the data may be missing from the source file or Name Card, the token may require a user entry, or more than one choice may be available for the token.

1. Click on the magnifying glass icon corresponding to the **Letter Recipient** field.

The File Related Person/Name Card pick list is displayed.

   a. Select Danner, Robert A. Mr. from the list.
   b. Click on the **OK** button to close the pick list and enter Mr. Robert A. Danner in the **Letter Recipient** field.

> NOTE: *Other tokens may be automatically populated by this one selection, if the tokens correspond to related data.*

Now that you have placed data in all the token fields on the Document Generation window, you are ready to generate the document.

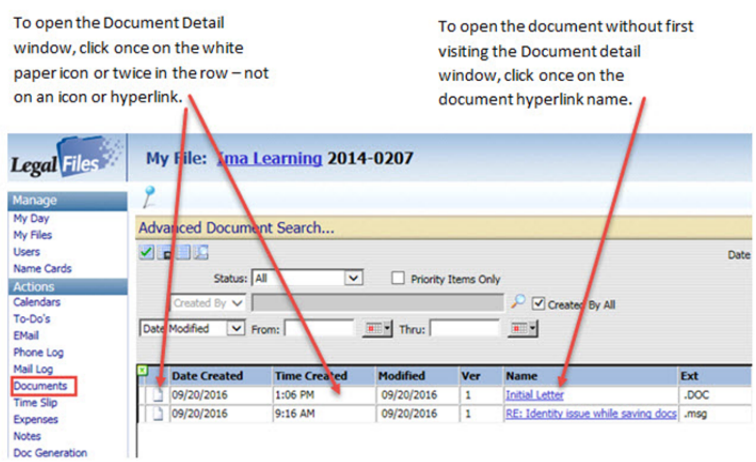
2. Click on the **Submit** button of the Document Generation window to close the window and send the document to be "batch" processed. The generated document will be automatically routed to your Heads Up Display.
3. Or click on **Run** to generate the letter "interactively".

> *NOTE: When using **Run** it runs as an interactive process. Therefore it will allocate the use of the Web window until processing is complete. If the document to be generated may take a long time to process then it is advisable to use Submit to allow it to process without tying up your screen.*

Displaying the Generated Document

Although a document can only be generated from a file, the generated document can be accessed from the file view from which it was generated and from the view of the user who generated the document.

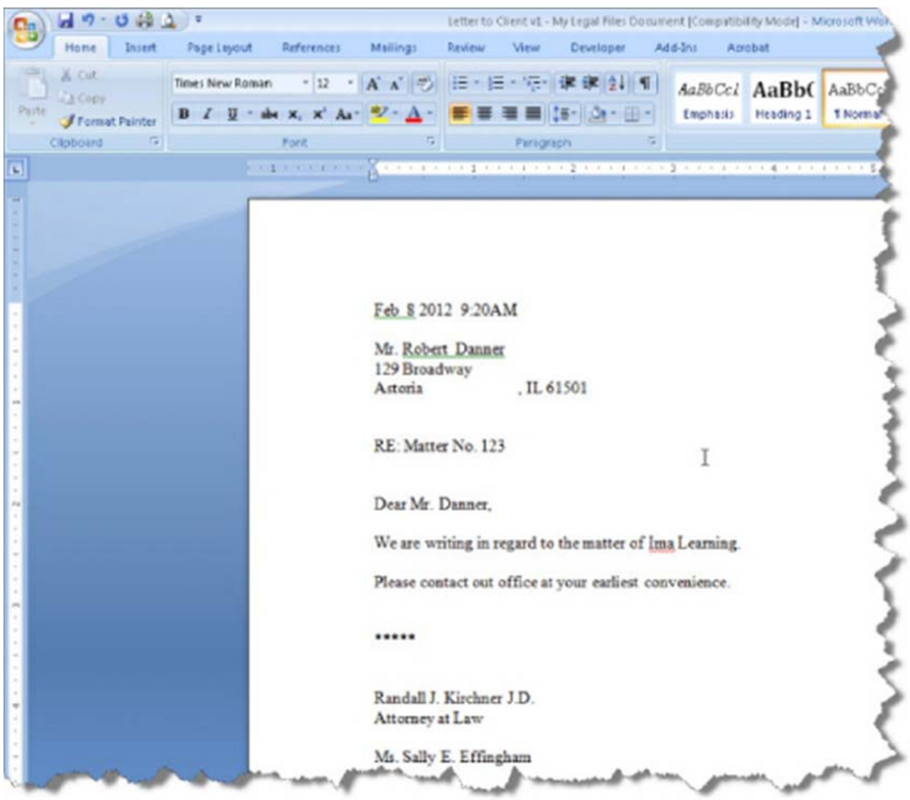
1. Click on the **Documents** hyperlink or icon in the Actions section of the *Ima Learning* file view.



*NOTE: If you chose "Classification View" as a User Preference for **File Document View**, your documents are grouped by Classification and Type. For now, click the **Search View** link above the folders to see a display similar to the image above. For information about your Preferences settings, see* "Establishing Preference Settings" *on page 19.*

Do you see your document listed?

2. Click on the Initial Letter hyperlink to view your generated document.



3. At the prompt, click **Open** to display the Word document.
4. The generated document displays as a Word document. Notice the data supplied from the Document Generation window is filled in. Because it now is a Word document, you can edit it as you would any other document.
5. **Close** the Word document.
6. Click **Save to *Legal* Files Web** to save any changes made.

About Reports

Concept

Legal Files offers several key reports from the Report section on the left-side column of the *Legal Files* window that are available to all *Legal Files* users. Additionally, *Legal Files* can accommodate Crystal Reports, allowing your office to create and run custom reports that are specific to your needs.

*NOTE: Click on the **Reports** heading in the lower-left column to display the list of the following standard reports:*

- **Crystal Reports** allow you to generate Crystal reports within *Legal Files*. Crystal reports will only be available in this module if *Legal Files* provided you with reports especially suited to your needs or if your office has written custom Crystal reports.
- **Report Status** reports on the status of reports run and documents generated based on selected criteria.
- **Custom Window Query** allows you to report key data elements on the File Detail screen in conjunction with your custom windows.
- **File Query** allows you to report key data elements on the File detail window. Keep in mind that these fields may have been relabeled by your system administrator.
- **Name Card Query** allows you to report on key data elements on the Name Card.
- **Expense Query** allows you to report on key data elements for expenses.
- **Time Query** allows you to report on key data elements from Time Slips.
- **Calendar Query** allows you to report on key data elements on Calendars.
- **Mgmt Dashboard**

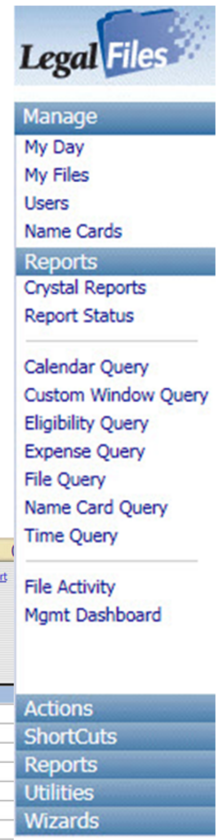
Chapter Lesson

This chapter explains the highlights of generating the Report Status, Custom Window Query, File Query, and Name Card Query reports. Please take some time to experiment with these reports. Preview all of your reports for now, rather than sending them to a printer.

Using *Legal Files* Reports

The ability for each user to generate the *Legal Files* reports is determined by your system administrator.

Generated reports can be printed or saved as HTML documents. They can be attached to action items and routed to other users as needed.



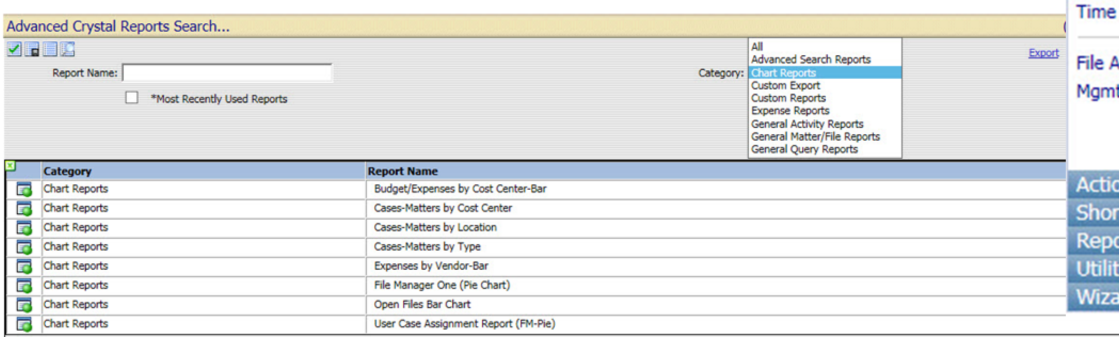
1. Click on the **Reports** heading in the lower-left column of the *Legal Files* window to display the list of reports.

About Crystal Reports

Select the **Crystal Reports** hyperlink to view and/or generate Crystal Reports. Crystal reports will only be available if *Legal Files* provided you with reports especially suited to your needs or if your office has written custom Crystal reports.

1. If available, use the search criteria to display your crystal reports list.

This example shows the reports available for the Crystal category.



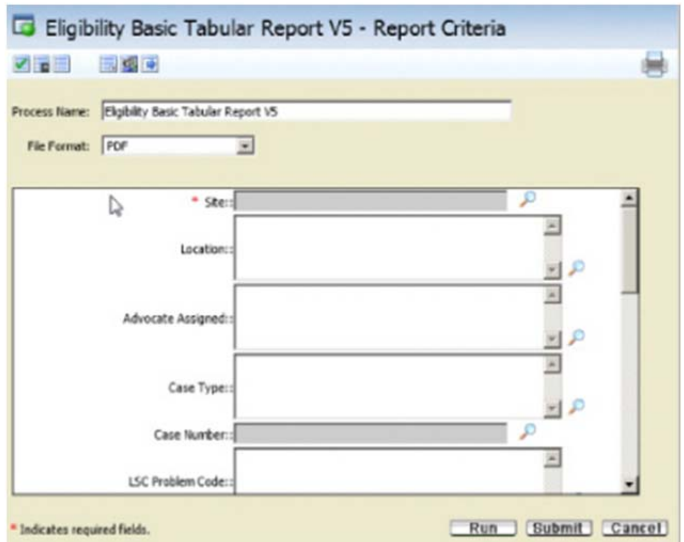
2. Click on the **Crystal Report Detail** icon, in left-most column, for the report you want to generate.

The report criteria window is displayed.

3. Enter the criteria for your report.
4. Click on the **Submit** button to send the report to batch generate. The report will be automatically routed to your Heads Up Display.

5. Go to the Report Status window to view the status of your generated report.
6. Or click on **Run** to process the report immediately.

*NOTE: When using **Run** be careful if this is a report that could take a long time to generate. Using **Run** is interactive with your screen display and a "processing" window will remain open until the report is completed.*



About Report Status

Select the **Report Status** hyperlink to view the status of generated reports and documents. The Report Status window applies to any Crystal Report or Document Generated, but not to the standard Query reports (Custom Window, File, Name Card, Expense, Time or Calendar).

1. Specify search criterion for the following fields, as necessary:

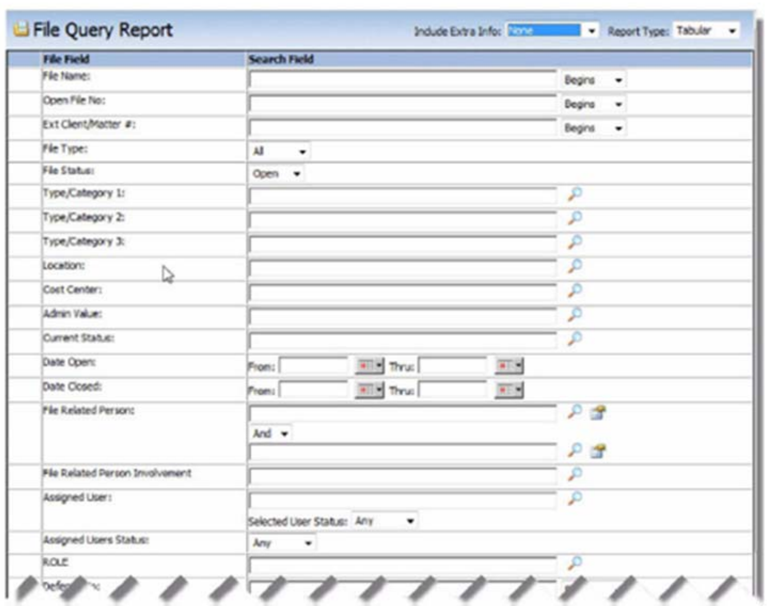
- **Status**. Select All, Complete, Errors, or Pending from the drop-down list.
- **Type**. Select All, Doc Generation, or Crystal Reports from the drop-down list.
- **Destination**. Select All, Heads-Up, Email, E-File, File, or None.
- **Frequency Type**. Select All, Years, Months, Weeks, Days, Hours, or Minutes.
- **Last Run**. Use the Calendar icon to select the date the report was run.
- **User**. Use the magnifying glass icon to select the user who ran the report.
- **Search Field**. Select None, Report Name, or Message in either of the Search field's drop-down lists.

2. Click on the **Crystal Report Status Detail** icon or the **Document Generation Report Status Detail** icon to view the corresponding report status detail windows.

About the File Query Report

Use the File Query report to select report criteria from the File detail window. In addition to the detail window fields, you can choose whether to include additional information about file history, file facts or file related people. You also can choose whether to generate the report in standard or tabular form.

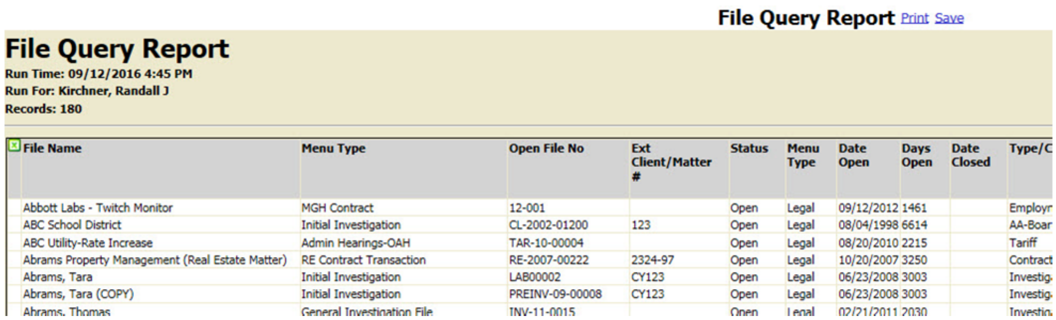
1. From the Reports section, click on the **File Query** hyperlink. The File Query Report window is displayed.
2. Use the various fields to filter the report criteria as necessary.
3. Select *Assigned Users*, *File Facts* or *File History* from the **Include Extra Info** drop-down list at the top of the window to include this data in your report.
4. Select a **Report Type** field of either *Standard* or *Tabular*. Tabular will generate the report in column format.
5. Click on the **Submit** button to run the report based on your selected criteria.



You must choose at least ONE criterion or filter to run the File Query Report.

NOTE: Keep in mind that these fields may have been relabeled (customized for your office / organizations use) by your system administrator.

About Reports


File Query Report Print Save

File Query Report
Run Time: 09/12/2016 4:45 PM
Run For: Kirchner, Randall J
Records: 180

File Name	Menu Type	Open File No	Ext Client/Matter #	Status	Menu Type	Date Open	Days Open	Date Closed	Type/C
Abbott Labs - Twitch Monitor	MGH Contract	12-001		Open	Legal	09/12/2012	1461		Employr
ABC School District	Initial Investigation	CL-2002-01200	123	Open	Legal	08/04/1998	6614		AA-Boar
ABC Utility-Rate Increase	Admin Hearings-OAH	TAR-10-00004		Open	Legal	08/20/2010	2215		Tariff
Abrams Property Management (Real Estate Matter)	RE Contract Transaction	RE-2007-00222	2324-97	Open	Legal	10/20/2007	3250		Contract
Abrams, Tara	Initial Investigation	LAB00002	CY123	Open	Legal	06/23/2008	3003		Investig.
Abrams, Tara (COPY)	Initial Investigation	PREINV-09-00008	CY123	Open	Legal	06/23/2008	3003		Investig.
Abrams, Thomas	General Investigation File	INV-11-0015		Open	Legal	02/21/2011	2030		Investig.

6. To print your report:

    a. Click the **Export to Excel** icon at the top of the first column . This exports the list of users to Excel, where you can format, sort and print the data.

Or, alternatively:

    b. You can either **Print** or **Save** that HTML document. If saved it could then be imported into an Excel spreadsheet.

About Custom Window Query

Custom Windows are one of the most popular and important features in Legal Files. Your office may use many Custom Windows to track a variety of file information (like contract amendments, court/litigation, leases, trademark filings, etc.).

Click on the Custom Window Query hyperlink to select report criteria in conjunction with the custom window fields.

Upon selecting the **Custom Window Query** hyperlink, you will be prompted to select a **Template Type** and a **Template** name. These correspond to:

- Whether the Custom Window is for a File, Name Card or any of the other types of Custom Windows that can be created in *Legal Files*.
- And then the name of the specific Custom Window that you will want to report results from.

Once you've selected the appropriate custom window template, you can select the criteria you want your report to be based off of. These report criteria pertain to the fields on the Custom Window plus some fields off the window for the type. For instance:

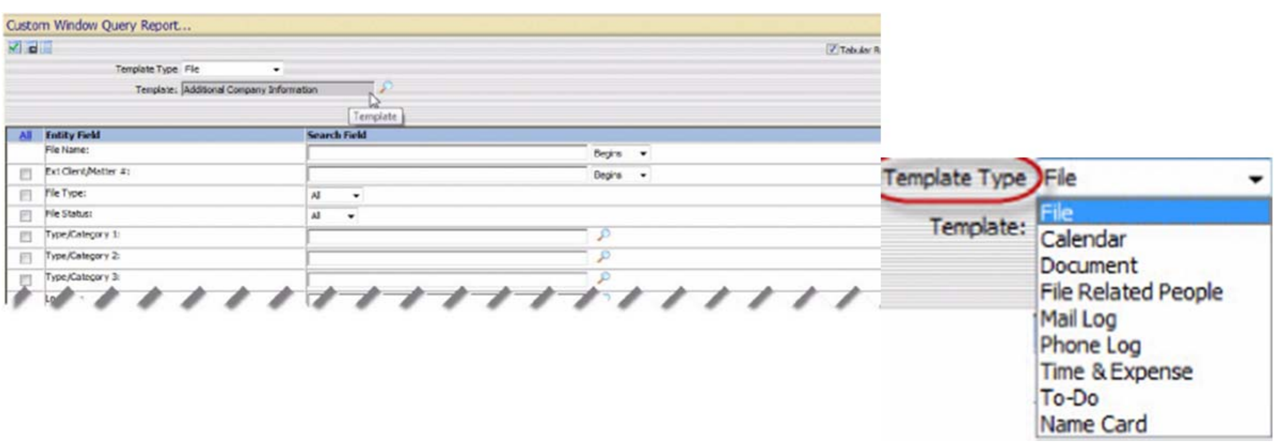
- If the Custom Window Type is File then fields from the File Detail window (e.g. File Type, File Status, Type Category 1, Type Category 2, Type Category 3, Location, Cost Center, Admin Value, Status, Date Opened and Date Closed) are available to select from.
- If the Custom Window Type if Name Card then fields from the Name Card Detail window (e.g. Name, Date of Birth, SSN, Alias, Client Ref/ID) are available to select from.

NOTE: Keep in mind that these fields may have been relabeled (customized for your office / organizations use) by your system administrator.

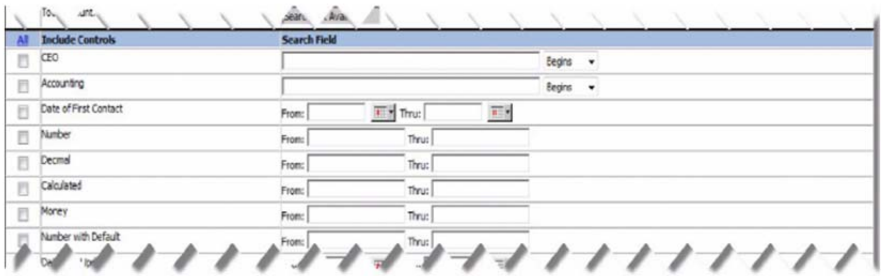
From the Custom Window Query Report view, select the search criterion as follows:

- Use the **Template Type** drop-down list to select the type of custom window template you want to report on. This selection determines the **Template** field choices.
- Click on the **Template** field's magnifying glass icon to select the custom window template from the pick list, and then click on **OK** to enter that field and display the Custom Window Query Report fields for that template.

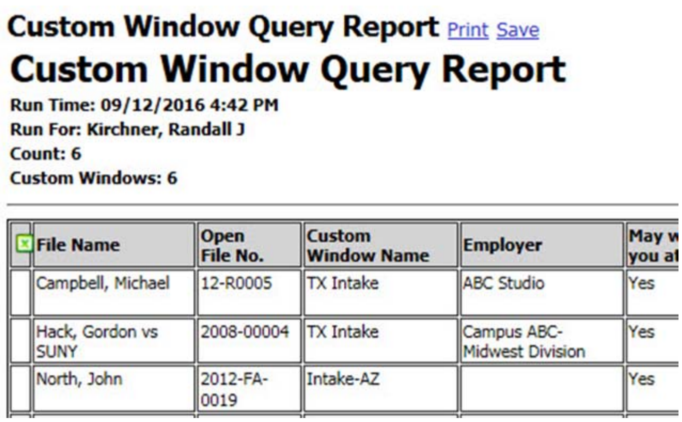
The following example shows *some of* the fields for the Additional Company Information custom window file template.



About Reports



1. **Tabular Report** check box should be selected by default. This will generate the report in columns.
2. Click on the desired left-hand checkbox items to select which File, Name Card or Custom Window data fields to display or the report, or click on **All** on the area of the window to display all fields pertaining to Custom Window data.
3. Click on the **Submit** button to generate the report based on your selected criteria.



Custom Window Query Report Print Save

Custom Window Query Report

Run Time: 09/12/2016 4:42 PM
Run For: Kirchner, Randall J
Count: 6
Custom Windows: 6

File Name	Open File No.	Custom Window Name	Employer	May w you at
Campbell, Michael	12-R0005	TX Intake	ABC Studio	Yes
Hack, Gordon vs SUNY	2008-00004	TX Intake	Campus ABC-Midwest Division	Yes
North, John	2012-FA-0019	Intake-AZ		Yes

NOTE: Notice how the report contains some data from the File Detail window (File Name, File #) and also data entered into the Additional Company Information Custom Window for those files.

4. To print your report:
   a. Click the **Export to Excel** icon at the top of the first column. This exports the list of users to Excel, where you can format, sort and print the data. This icon appears on many *Legal Files* reports.

Or, alternatively:

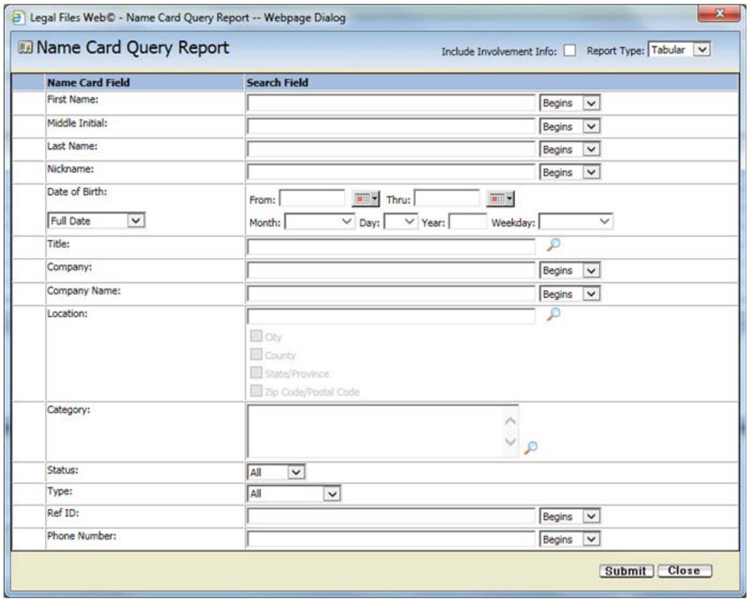
b. You can either **Print** or **Save** that HTML document. If saved it could then be imported into an Excel spreadsheet.

About the Name Card Query Report

Use the Name Card Query report to select report criteria from the Name Card detail window. Besides the detail window fields, you can choose to include information about Involvement Info. You also can choose whether to generate the report in standard or tabular form.

1. From the Reports section, click on the **Name Card Query** hyperlink.

The Name Card Query Report window is displayed.



2. Use the various fields to filter the report criteria as necessary.
3. Check the **Include Involvements Info** check box at the top of the window to include files the Name Card is involved with in your report.
4. Change the **Report Type** field from *Standard* to *Tabular* if you want the report to display in column format.
5. Click on the **Submit** button to run the report based on your selected criteria.

You must choose at least ONE criterion or filter to run the Name Card Query Report.

Managing what matters to you.

Name Card Query Report - Tabular Print Save

Name Card Query Report

Run Time: 09/12/2016 4:47 PM
Run For: Kirchner, Randall J
Name Cards: 419

Name	Type	Date of Birth	Company	Ref ID	Address
3M Company	Company			ab	
5th Judicial District of the State of Idaho	Company			Do Not use	
7th Federal Circuit Court (4th District)	Company				101 North Capitol, Springfield, IL 62701
A & B Irrigation District	Company				
AAA Child Care Center	Company			112233	1234 Main Street, Suite 2100, Denver, CO 80210
Abbott Laboratories, Inc.	Company				123 Main St, Augusta, ME 04330
ABC Airlines, LLC	Company				1818 East McKinley Ave., P.O. Box 66, Springfield, IL 62701

The report is generated in Tabular format by default.

6. To print your report:
    a. Click the **Export to Excel** icon at the top of the first column . This exports the list of users to Excel, where you can format, sort and print the data.

Or, alternatively:

   b. You can either **Print** or **Save** that HTML document. If saved it could then be imported into an Excel spreadsheet.

Using Short Cuts, Utilities and Wizards

Concept

The Short Cuts menu provides a quick and easy way to access web sites from within *Legal Files*. Your system administrator can define web site short cuts. Depending on your office policies, you also can create your own web site short cuts.

The Utilities menu displays hyperlinks to add-on features of *Legal Files*. The available utilities will vary according to office needs, but by default, all *Legal Files* users have access to the Batch Doc Generation utility.

Use Batch Doc Generation to select one or more files and/or document templates for batch processing. For each batch processing request, you can schedule when to batch process the selected items, whom to notify, and where to send the batch processed items (i.e., Heads Up, Email, or the printer).

Chapter Lesson

In this lesson you will learn how to use and create web site short cuts, and the basic operation of utilities and wizards.

Using Short Cuts, Utilities and Wizards

About Short Cuts

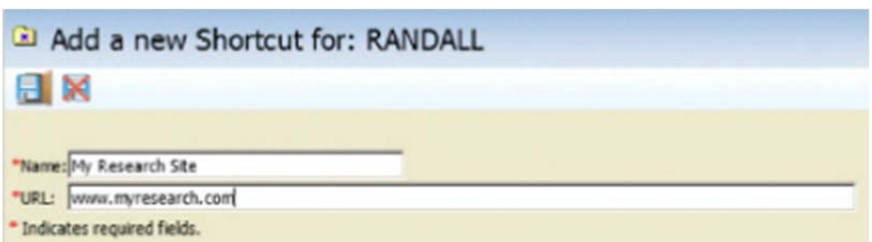
Use **ShortCuts** to save your favorite web sites for easy access inside *Legal Files*. Just click on an existing hyperlink inside the ShortCuts column to display the web site in a new Internet Explorer window, leaving your *Legal Files* window still available. Your system administrator can create web site short cuts to ensure that all *Legal Files* users have access to specific web sites, such as the company web site. Additionally, depending on office policy, users can create short cuts to their favorite web sites.

Creating a Web Site Short Cut

1. Click on the **ShortCuts** heading (1) in the left-side menu column.

   This displays the ShortCuts menu and any shortcuts that have already been added.

2. Click on the **ShortCuts** menu heading (2).
   This will display the Add New Short Cuts window.



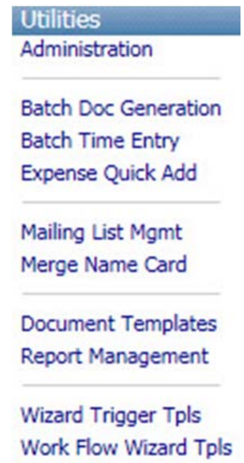
3. Use the two fields to enter the web site address (i.e. the URL) and a descriptive name for the web site that will appear in your ShortCuts menu.

Displaying a Web Site Short Cut

1. Open the **ShortCuts** menu.

2. Click on the hyperlink of the web site you want to display.
3. The web page displays in a new Internet Explorer window, separate from the window in which *Legal Files* is displayed.
4. **Close** the web window when finished.

*NOTE: Some Shortcuts have a **Delete** icon beside them and some don't. Those with a delete icon are user-added Shortcuts and can be deleted. Those without the icon are System Shortcuts and can only be maintained through the Legal Files Desktop maintenance program.*



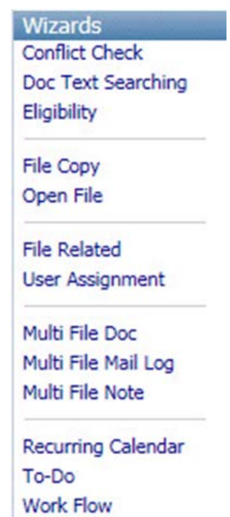
About Utilities

The Utilities menu displays add-on features supplemental to *Legal Files*. Your system administrator determines which utilities you can access.

The function and descriptions of how to manage each Utility can be found when you click on the Help hyperlink in your *Legal Files* application.

About Wizards

The Wizards menu displays additional *Legal Files* functions. Your system administrator determines which utilities you can access. This manual explains the functions of *Legal Files* Wizards; for more information on using Wizards, click on the Help hyperlink in your *Legal Files* application.



Conflict Check

Use **Conflict Check** to determine whether an entity (person or company) has been involved in a file, either open or closed, which will quickly determine if there might be a conflict of interest.

The Conflict Check is similar to the Name Card Involvements tab in its goal to determine file conflict, but unlike the Involvements tab, the Conflict Check can:

- Search for conflicts on multiple people at once.
- Be configured to search your site or, for users of *Legal Files* Enterprise, search every site.
- Specify search criteria based on a variety of different Name Card data, including Email address.
- Allow for a variety of search methods (Exact, Contains, Sounds Like, and Begins With Match), helping to ensure that a name is not missed because the person used a middle initial in the first name card and you are searching for it without a middle initial, or maybe the name card was entered as Obrien instead of as O'Brien.

Using Short Cuts, Utilities and Wizards

Doc Text Searching

Use **Doc Text Searching** to search the content of documents saved to *Legal Files* in one or multiple files. This function is useful if searching for all references to specific terms or concepts.

The content of two types of documents will be found by this feature: Microsoft Word documents and OCR'd (Optical Character Recognition) PDF documents. Doc Text Searching does not search values captured on a Document Detail window (i.e., Document Name, Classification, Type, etc.); it searches the content of the actual documents themselves.

File Copy

Use **File Copy** to create a new file from an existing file. The file setup, file related people data, and various windows of the selected file are copied to a new file; Action items are not copied. The File Copy Wizard allows you to specify changes as needed without affecting the source file. The File Copy Wizard also lets you relate the copied file to the source file from which it was copied.

Open File

Use **Open File** to automatically walk through the file opening process. Information regarding the Open File Wizard is found in "Creating a File" on page 41, as well as through the Help hyperlink in your *Legal Files* application.

File Related

Use **File Related** to:

- Add a File Related Person to one or more selected files at the same time, or
- Replace one File Related Person with another on one or more selected files at the same time.

The File Related Person is selected from the Name Card Chooser window, which allows you to pick from active and inactive name cards.

User Assignment

Use **User Assignment** to

- Add a user or team of users to one or more files at the same time,
- Grant a user or team access to one or more files at the same time, or
- Replace a user with another on one or more files at the same time.

The user or team is selected from the Pick Users window, which allows you to pick from active and inactive users.

Multi File Doc / Mail Log / Note

Use **Multi File Doc**, **Multi File Mail Log** or **Multi File Note** to import a document, create a mail log, or create a note and apply it to multiple files at the same time.

Recurring Calendar

Use **Recurring Calendar** to schedule recurring appointments:

- For one or more users,
- Related to a single file or no file at all,
- With recurring features, including daily, weekly, monthly, or yearly occurrences, specific days on which it is to recur, the number of occurrences or on what date it is to end. Additionally, you can set an appointment to recur on the dates and intervals you choose.

To Do

Use **To Do** to schedule tasks for:

- One or more users,
- Across one or more files,
- With optional recurring features (i.e., daily, weekly, etc.)

Work Flow

Use **Work Flow** to automatically create To-Dos and/or Calendars and assign them to users based on the role they are given in the file. The Work Flow Wizard uses a template, which you create, that contains the To-Dos and/or Calendars that will be assigned, thus standardizing the process and ensuring nothing is forgotten. Your *Legal Files* administrators can create Work Flow Wizards.