Improving the Business of Law

User's Guide

Version 8.6
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RealLegal

Practice Manager™

law.com

Version 8.6

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Welcome to Practice Manager

Introduction

Welcome to Practice Manager (Practice Manager), the most comprehensive and advanced software for case and practice management available today. Besides providing straightforward case, file, and document management systems uniquely suited to your practice, Practice Manager coordinates all the functions of modern law practice. Practice Manager includes:

- **Matter Information**. That keeps track of the information you need to "open a file", lets you see all of the cases you are handling at a glance and allows you to create the Matter reports necessary to run your practice
- **Address Book**. That maintains comprehensive information about all contacts: clients, personnel, other counsel and any other parties. There is a centralized Global Address Book Listing as well as a listing specific to each Matter that includes the role of each Entity.
- **Document Management**. That automatically names, categorizes and tracks documents of all types and formats–whether created locally or scanned into Practice Manager.
- **Document Assembly**. That merges addresses from your Address Book into your letters, automatically creates pleadings, including captions, and enables you to create boilerplate documents that fill themselves out.
- **Notes** That let you store, organize, search, and print important client information, file memoranda, phone and research notes from the computer.
- **Time and expense tracking**. That automatically captures all time and expense data as you work and sends it to your time and billing program.

- **Workflow and GroupWare**. That tracks and organizes your tasks, phone calls, appointments, court events and critical deadlines, maintains your calendar and keeps a record of every item sent or received by your GroupWare application—Microsoft Outlook or Novell GroupWise.

About Practice Manager

Practice Manager is designed to organize all information by Matter. The program is divided into several primary modules, each dealing with a different aspect of a Matter: Matter administration, Entities, Documents, Timeslips, Notes, Workflow, and GroupWare. In Practice Manager, you have the ability to display the information captured by each of these modules in two ways: in relation to an individual Matter; or, in relation to all Matters. Whether you are viewing information relating to a single Matter or all Matters, Practice Manager gives you the ability to sort and select or "filter" information in many useful ways.

About the Practice Manager Modules

When you open a module, a listing of all of the information contained in the module is displayed for all Matters. Within a matter itself, you can view each of these modules as they relate to that particular matter. After you have opened the matter, these listings are accessed via specifically labeled tabs for each module within the matter record itself. The modules include:

- **Address Book**–also referred to as the Entity Listing, is where you maintain an office-wide listing of all individuals and organizations involved in your Matters. Entities can be "assigned" to individual Matters, so that you can see at a glance every individual or organization involved in the Matter together with their respective "roles" in the Matter.

- **Documents**–a listing of all outgoing and incoming documents involved in all your Matters or those created in a particular Matter.

- **Timeslips**–a listing of all the time and expense slips generated in all Matters or in the particular Matter that is open. Timeslips can be displayed in a calendar format.

- **Notes**–a listing of your notes for all Matters or for the Matter that is open.
- **Workflow**–a listing of all Workflow Activities–Tasks, Phone Calls, Appointments, Court Events and Critical dates–for all Matters or a particular Matter; Workflow Activities can also be displayed in a calendar format.
- **GroupWare**–a listing of all messages sent or received through your GroupWare application, including e-mail messages, appointments, tasks and notes organized for all Matters or by Matter. GroupWare Items can also be displayed in a calendar format.

Global vs. Matter

Matter information entered into Practice Manager's modules can be presented to you in two ways.

- **Global** – The Global Listings give you a view of the data for all of your Matters. This information is accessed from the Practice Manager Menu or the Practice Manager Toolbar. For instance, by clicking on the Address Book icon , you can display a list of all Entities involved in all of the Matters in your office.
- **Matter** – The Matter Listings give you information for each module relevant solely to the Matter at hand. This information is accessed from tabbed screens, once you are in an open Matter. For instance, after opening a Matter, you can click on the Players tab to display the Entities assigned to the Matter.

About this Manual

This manual organizes the information you need to use the features of Practice Manager. Practice Manager runs on the Windows (95, 98, NT or 2000) operating systems in a network environment. It integrates with your word processing program–either Corel WordPerfect or Microsoft Word, and with GroupWare software–Microsoft Outlook or Novell GroupWise. This Manual assumes you have a working knowledge of these other software applications and discusses their features only as necessary to enable you to understand the features of Practice Manager.

Where to Go from Here

Before you can begin using Practice Manager, it needs to be setup on your computer.

- If you are using a workstation connected to a network, setup involves installing some drivers and software from Miscrosoft (MDAC), and adding some shortcuts to the Practice Manager program file located on the network server. For more information, refer to the **RealLegal Practice Manager Workstation Installation Guide.**

  Your system administrator also needs to setup a user account for you within Practice Manager. The user account information includes the following:

  - A Login code that uniquely identifies you within the system
  - A password

  Note

  Depending on the security policies of your office, you may or may not receive a password. If you do, you will be required to use it everytime.

- If you are using a single-user license of Practice Manager, setup involves installing Practice Manager on your computer. For more information, refer to the **RealLegal Practice Manager Installation Guide.**

To start and log in to Practice Manager

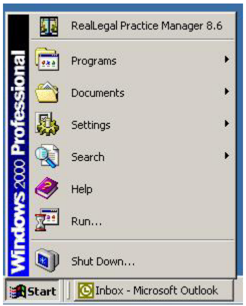
Use the following procedure to start and log in to Practice Manager.

1 Locate the Practice Manager icon at any one of the following locations, and start Practice Manager:

- As a desktop icon on your Windows desktop…

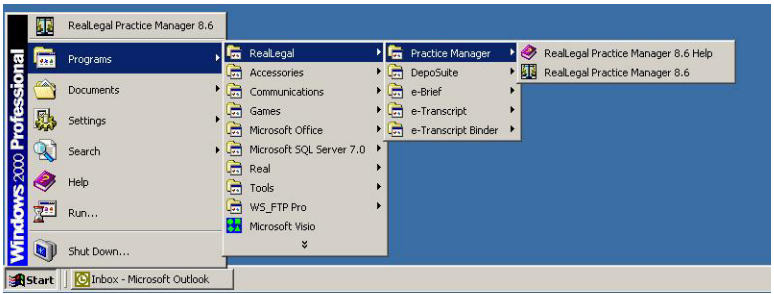
To start Practice Manager, place the mouse pointer over the desktop icon, and click twice (double-click).

- As a program on your Windows Start Bar…



To start Practice Manager, place the mouse pointer over the Practice Manager Start Menu item, and click once.

- As a program on your Program menu on your Windows Taskbar…



To start Practice Manager, place the mouse pointer over the Practice Manager Prgram Menu item, and click once.

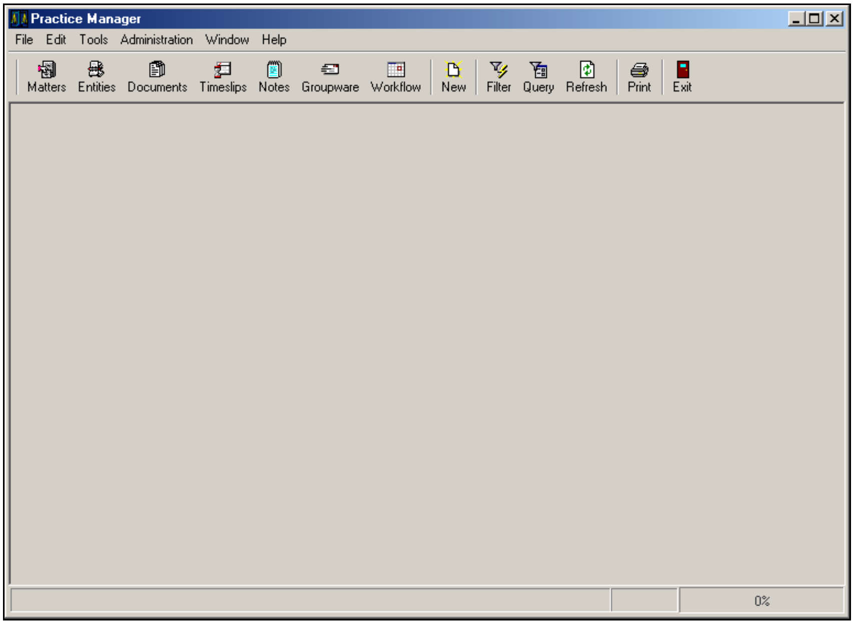
The Practice Manager login window appears.

2 Enter your **Login** code and press Tab. The cursor advances to the **Password** field.

Note

*If you have not received a personal **Login** and **Password**, please contact your Practice Manager™ administrator.*

3 Enter your **Password** (if any), and press **Enter** or click **OK**. The Practice Manager main window appears.



4 Proceed as follows:

- To create a new matter, entity, document, timeslip, note, groupware or workflow item, choose **File – New** and select the appropriate menu item.
- To view a list of matters, entities, documents, timeslips, notes, groupware or workflow items, choose **File – Open** and select the appropriate menu item.
- To customize Practice Manager for your use, choose **Edit – Preferences**.

Chapter

2

Using Practice Manager

Working with the Practice Manager Main Window

Since Practice Manager is a Windows program, its windows share standard features common to all Windows programs. When you **log on to Practice Manager**, you are presented with the Practice Manager Main Screen, and can access all of the features of the program. To gain access to these features, Practice Manager presents you the same type of menus, toolbars, icons and controls that are used in other Windows applications.

Windows Title Bar

At the top of the screen is the Windows® Title Bar. This bar tells you which program and Practice Manager™ module you have running on your computer.

Window Control Buttons

Located in the upper right corner of the window on the title bar, the window control buttons provide control the size of the windows that are open.

Click the **Minimize** button to remove the current window from view and display it on the Taskbar.

Click the **Maximize** button to enlarge the window to a full screen display;

Click the **Restore** button to shrink the size of a maximized window to its original non-maximized size.

Click the **Close** button to close the current window or, if the only window open is the Practice Manager Main screen, to close the Practice Manager program.

Practice Manager Menu Bar

The Menu Bar provides access to all functions in Practice Manager.

File Edit Tools Administration Window Help

When you select an item on the Practice Manager Menu Bar a drop-down menu containing further selections will display. These drop-down menus can also be displayed by holding down the Alt key and striking the key containing the letter which is underlined in a particular item on the Menu Bar. For instance, holding the Alt key and striking "F" will display the File Menu. The functions listed on each menu usually have some logical relation to each other. The entries on some menus, notably the "View" menu, have entries that relate to the Window that is currently open. The function of each menu item is discussed in detail in connection with particular topics and is summarized here.

File Menu

File Menu commands:

- **New.** Create new records for each of the modules of Practice Manager.
- **Open.** Open the Listings for each of the modules of Practice Manager or open the currently selected record on any of these listings.
- **Close.** Close the currently open Window.
- **Close All.** Close all windows open in Practice Manager.
- **Save.** Save the currently open file.
- **Delete.** Delete a highlighted record on a Listing.
- **Refresh.** Refresh the currently displayed Listing with any changes that have recently been made.
- **Printer Setup**. Access to the printer settings used for Practice Manager.
- **Print.** Print the currently displayed Listing to a printer, the screen or a file.
- **Exit**. Exit Practice Manager.

Edit Menu

Edit Menu commands:

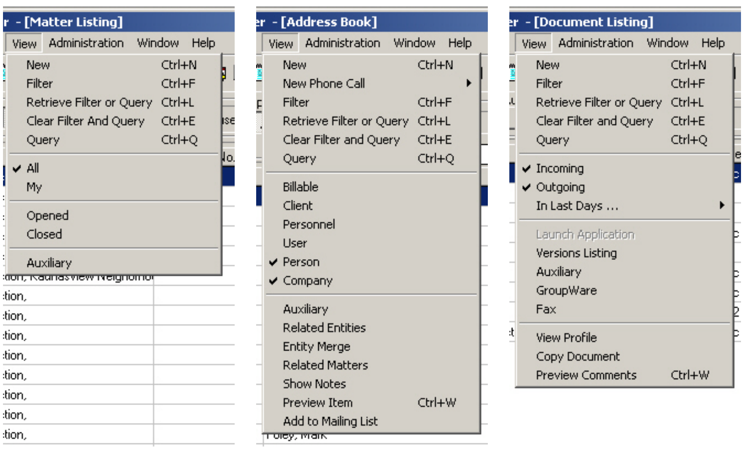
- **Cut.** Cut highlighted text in the field of a record.
- **Copy.** Copy highlighted text in the field of a record.
- **Paste.** Paste text that has been cut or copied into the field of a record.
- **Toolbar.** Turn on or turn off the Practice Manager Toolbar.
- **Preferences.** Access the User Preferences screen.

View Menu on Listings

The View Menu becomes visible when you have opened a Listing for one of the modules of Practice Manager, and is typically divided into three or four sections, with the top two always having the same basic functionality.

- From the top section, you can create a new record for the current listing, as well as filter, retrieve saved filters and queries, clear any applied filters and queries, and create a new query.
- From the second section, you can apply any any filter criteria. The hot filter criteria that appears on this menu is unique to the active listing.
- The remaining sections are unique to each listing, and are typically applicable to the select record on the list.

The following shows the View menu opened from the Matter Listing, Address Book, and Document Listing (left to right):



The View Menu can also be displayed by clicking the Right Mouse Button on any record in the list.

For more information, see "Using Listings" beginning on page 3-1.

Administration Menu

The Administration Menu gives access to the Administration functions of Practice Manager. From the Admin Menu, your System Administrator will customize the features of Practice Manager to meet the needs of your office. Depending upon your Security Level, you will have access to some or all of the functions controlled from the Admin Menu.

For more information, see the **RealLegal Practice Manager Administrator's Guide**.

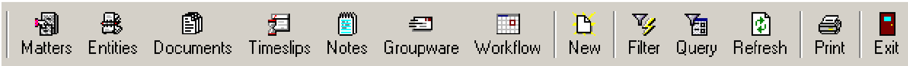
Window

From the Window menu, you control the windows that Practice Manager has open at any time.

- **Cascade.** Cascade all open windows—overlapping and slightly offset so that you can see and access all open windows.
- **Tile.** Arrange all open windows in equally sized tiles, so that all are visible on the screen.
- **Minimize All.** Minimize all Practice Manager windows. Each window is represented by an icon. The icons are arranged at the bottom left edge of the screen. Each window can be closed, maximized or restored to its size before being minimized, by clicking on the appropriate Windows Control Button
- **Arrange Icons**. If the icons, representing minimized Windows, have been moved around the screen, selecting this menu item will restore the icons to their original position at the bottom left edge of the Practice Manager Main screen.
- **Close All.** Close all windows that are open in Practice Manager.
- **Listings.** A list of all of the Practice Manager windows that are currently open will appear at the bottom of the Window Menu. You can switch to an open window by selecting it from the list.

Practice Manager Toolbar

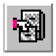
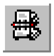
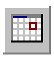
Below the Practice Manager™ menu is the **Practice Manager™ Tool Bar**.



The Tool Bar displays icons that provide quick access to the most commonly used functions. When the mouse pointer is placed over an icon, a pop-up balloon, known as a ToolTip, will drop down to display the title of the function that will be executed when you click the icon. For a detailed listing of these functions, see **Toolbar Controls**.

Icons That Open Listings

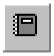
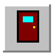
The following icons are used to display Listings of records relating to all Matters.

Button	Function	Explanation
	**Matters**	Displays a Listing of all Matters
	**Entities**	Displays a Listing of all Entities
	**Documents**	Displays a Listing of all Documents
	**Timeslips**	Displays a Listing of all Timeslips
	**Notes**	Displays a Listing of all Notes
	**GroupWare**	Displays a Listing of all GroupWare Items
	**Workflow**	Displays a Listing of all Workflow items

General Icons

The following icons access features that are generally applicable to Practice Manager, including printing, windows and filters.

Button	Function	Explanation
	New	Provides a quick means to create new Matters, Address Book Items, Documents, Timeslips, Notes, and GroupWare or Workflow items.

Button	Function	Explanation
	Filter	Displays the Filter screen for the current Listing.
	Query	Displays the Query Creation Dialog, used for creating advanced queries to filter records.
	Refresh	Updates all records on the Listing.
	Report	Starts the Quick Report Program that presents you with a menu of predesigned reports. You are able to select a report and set its parameters.
	Print	Prints the current Listing.
	Exit	Exit Practice Manager.

Practice Manager Status Bar

The Practice Manager Status Bar at the bottom of the screen displays the Matter name, Matter No,.and Client No. for the Matter that is currently open. It also displays the amount of time the Matter has been open.

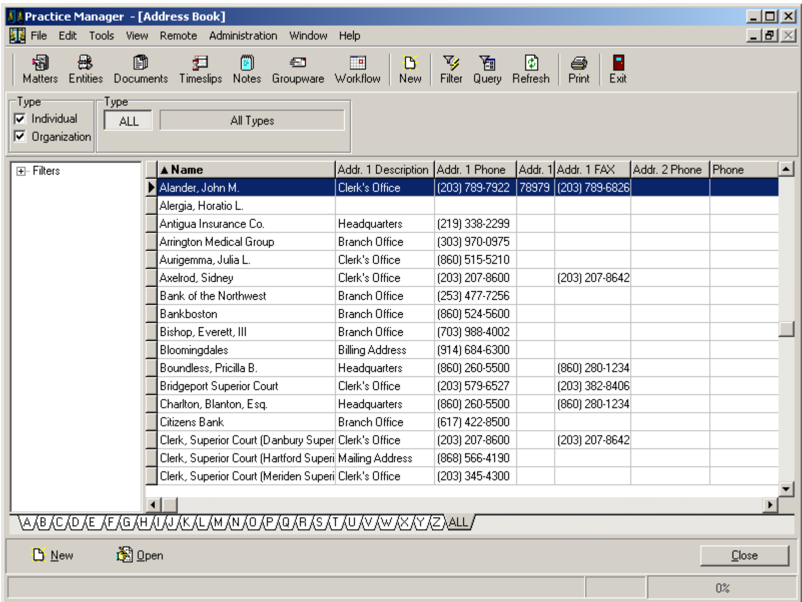
Working with Practice Manager Windows

Types of Windows

There are several types of windows in Practice Manager, each designed to carry out a specific function as efficiently as possible. Each type of window has its own unique behavior applicable to its function, yet all have many common elements.

List Windows

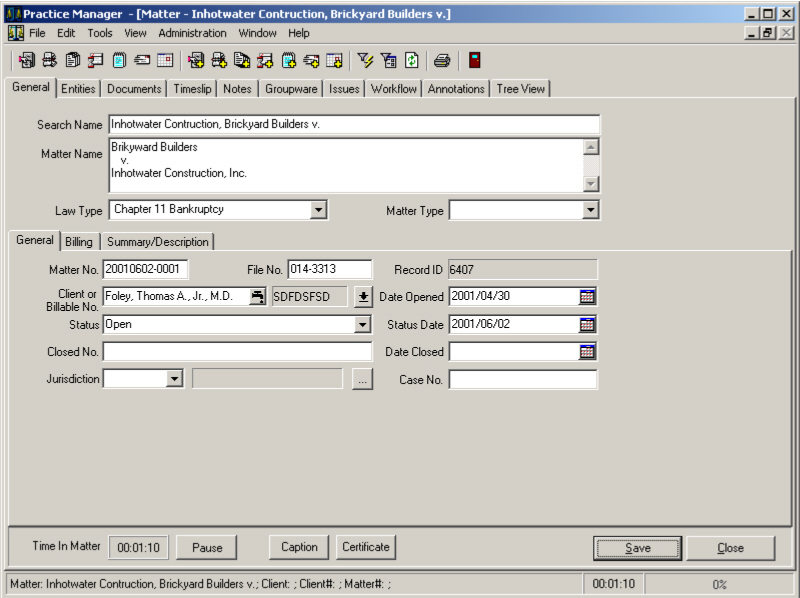
Access to records in Practice Manager is primarily provided through lists.



There is a lot of functionality associated with list windows. For more information, see "Using Listings" beginning on page 3-1.

Data Windows

Data windows are used to enter information into Practice Manager, and to relate records together, such as assigning entities to a matter.



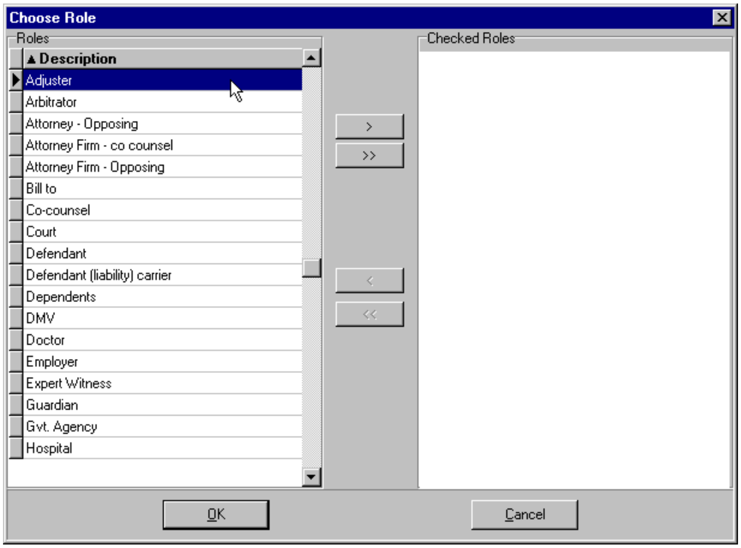
The majority of data windows in Practice Manager consist of multiple tabs, each of which can contain a data entry fields, a list or both. When a multiple data window is open, the tab that is "active" will appear in front of all of the others. To switch to another tab, click on the tab label. This tab and its contents are no active and on top.

If you switch from one page of data to another, Practice Manager may display the message Save Changes?, even if no changes are made.

- **Yes** will save the changes you have made and then display the next page.
- **No** will discard the changes you have made and then display the next page.
- **Cancel** will return you to the page where you were working without saving the changes or displaying the next page.

Dual-Pane Selection Windows

Practice Manager uses a Dual-pane Selection Dialog or Pick-List to permit you to choose several options at once. When multiple selections are permitted, the Dual-pane Selection Dialog will be displayed.



To make selections, you highlight items in the left pane and then click on the appropriate control buttons located on the panel between the two panes. Items selected appear in the right pane. To remove items from the list, you reverse the process.

- **To select a single item,** highlight a list item in the left pane and click on >.
- **To select all items**, click on >>. (There is a limit of 20 items that may be selected at once.)
- **To select several items**, hold down the Ctrl key, click on each item to be selected in one pane and then click either > or < .
- **To remove a single item,** highlight the item in the right pane and click on <.
- **To remove all items,** click on <<.

Window Elements

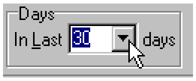
Buttons

Many screens have buttons to control execution of features. You can execute a button by clicking on it. If the button is highlighted, you can press **Enter** on the keyboard to execute it. Normally, the tab key will move the cursor through all of the fields and buttons on the screen.

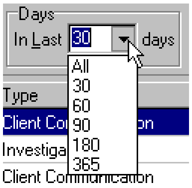
Button	Function
Ok	To accept the data as entered on a data entry screen
Cancel	To cancel adding or changing information on a data entry screen and return the original data. If you cancel from a screen where you have made changes or entries, you will get the message "Discard changes?" Select **OK** to accept the data as entered on a data entry screen. Select **Cancel** to cancel the additions or changes.
Close	To close the current window or screen and return you to the window or screen from which you launched the closed window or screen. If you close a screen, whether you have made changes or entries, you will receive the message "Save Changes?" ♦ Select **Yes** to save the changes. ♦ Select **No** to discard changes.
Save	To save any changes you have made to the current screen without closing the screen. On some screens, Save also closes the screen.
Open	To open the screen for viewing or editing the information of the selected record. If the item was created with an external application, such as WordPerfect, Microsoft Word or ImageView, the item will be opened in that application.
New	To create and add a like item to the displayed list, such as a Matter, Entity, or Document
Print	To print records displayed on a Listing or a Calendar to the printer, the screen or a text file.

Basic List Field

The Basic List Field contains a down-arrow on the right side of the field.



You may choose to type the value in this field, or, clicking on the arrow displays a list of choices:

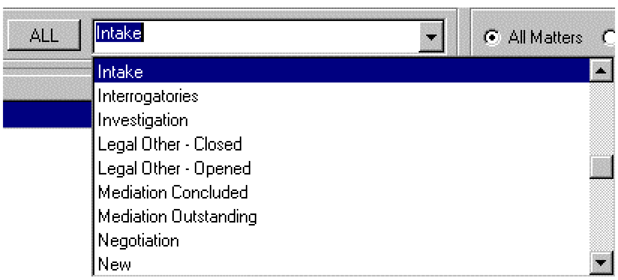


To select from the list, move the mouse pointer down the list to the choice you want. The selection will be automatically highlighted in blue. When you click on the selection, it will be entered in the field.

Combination List Field

The Combination List field allows you to choose between one option and all options in a list. This is done by combining a type of toggle switch—called the **All** button--with a Basic List Field. When the **All** button is in the Down—or depressed—position, all of the options on the list are in effect. For instance, on the Matter Listing Screen, all Matters are displayed when the **All** button is depressed:

When the **All** button is in the Up—undepressed—position, a list of choices becomes active and you can make a selection in the same way as a Basic List Field.



Lookup Fields

In many places throughout Practice Manager you will be asked to make selections from a list in order to fill out a field. In those cases where only one selection is appropriate, the choices will be presented in a **List Field** or a **Lookup Field**. Where you are permitted to choose more than one selection from a list, a **Dual-pane Selection Dialog**, also called a **Pick-List**, will be used.

When you have to make a selection from a list of choices derived from a Listing, a Lookup Field is used. For example, a Lookup Field is used to select the name of the Client to be linked to a Matter in the Matter Information Screen. There are two types of controls used for a Lookup Field—the Lookup Filter Control and the Lookup Listing Control —which are sometimes used in combination.

- Lookup Filter Control 

  The Lookup Filter Control resembles a faucet. When you click on the Filter Control a list of choices, derived from the appropriate Listing, will be displayed. To limit—or filter—the choices in the list, you can type the first few letters of the choice you are seeking into the Lookup Field. As you type, the list will display only those entries that match the letters entered in the field. Highlight and click on the choice you want to insert into the Lookup Field.

- Lookup Listing Control 

  The Lookup Listing Control looks like the down-arrow used by the Basic List Field, but it has a line under it. When you click on the down-arrow, a new window will open, containing the Listing from which the selection is to be made. The Listing will normally contain all of the Filters and other controls used to make selections from Listings. See Listing Components and Controls. After you make the selection, the window will close and the choice will be displayed in the Lookup Field.

Date Fields

Several record entry screens require you to enter the date or time. Dates and time are entered in special data-entry fields. Practice Manager allows you to enter dates either by typing the date or choosing the date from a calendar. For time entry, a special control ensures that you enter the time in the correct format.

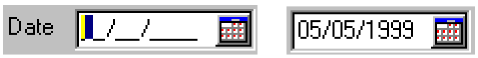
There are two ways to enter dates into date fields:

- Choosing a Date Using the Calendar Control 

Dates are entered in the Date-entry field. You can enter dates manually by typing the numbers representing the day, month and year of the date, or you can click on the Calendar Control icon and choose the date from a calendar, which will automatically insert the date into the Date-entry field in the correct format.

♦ Typing the Date

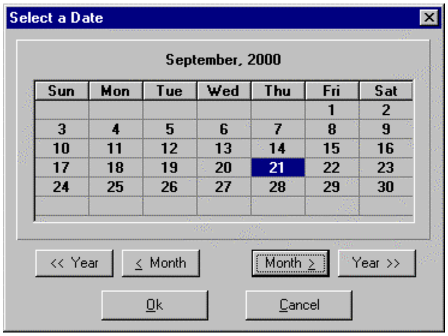
Practice Manager can be customized by the System Administrator to permit dates to be entered in many different formats. The month, day or year can be arranged in several different orders; the number of characters used to represent the month or year can be changed; and different characters can be used as the symbol that separates them. The Date-entry field itself will display the separator character and the number of characters used to represent a month or year.



- For single-digit months or days, you can enter the number of the month or day or the number proceeded by “0”. For example, “06” for June or “03” for the third day of the month.
- For the year, you can use two or four digits, even if the date format displays four digits. Practice Manager will automatically convert a two-digit year into four digits. For example, typing “98” will be converted to “1998”.
- To easily enter “today’s date” hit the spacebar while in this field.
- After entering the characters representing the day, month or year, typing the separator character, will automatically bring you to the next part of the date in the Date-entry field.

To use the Calendar Control to enter the date:

1 Click on the Calendar Control icon to display the Date Calendar.



2 Click on the desired date to select it.

– To move to the next month, click Month >.

– To move to the previous month, click < Month.

– To move to the next year, click Year >>.

– To move to the previous year, click << Year.

3 Click the **OK** button.

Time Fields

Times are entered in Time-entry fields. Time-entry fields are composed of three separate parts or compartments—one for the hour; one for the minute; and one for the part of the day (“AM” or “PM”).

To enter the time in a Time-entry field, move to a compartment and enter the appropriate numbers or letters, using the spin button.

Clicking on the up-arrow will increment the number or letter; clicking on the down-arrow will decrement the number or letters. On some screens, time fields have to be activated before they can be used, by selecting a checkbox in the field. Time-entry fields are initially fixed at 12:00 AM when a new record is created.

Using the Keyboard with Practice Manager

Keystroke Combinations

For some features, the Function keys or other keys on the keyboard are used in combination with the Shift, Ctrl or Alt keys. To use a Function key or other key in combination with the Ctrl, Shift or Alt key:

5 Hold down the Shift key, Ctrl key or Alt key.

- The **Ctrl** and **Alt** keys are usually marked as such and located at the bottom left corner of the keyboard. There may be a second **Ctrl** and **Alt** key located on the right side of the spacebar.
- The Shift keys, normally used to capitalize a letter, are located on the left and right ends of the bottom row of letter keys.

6 While still holding down the Shift key, Ctrl key or Alt key, strike the other key of the key combination.

Most Shortcut keys and key combinations are listed on Practice Manager Menu or **View Menu** next to the corresponding menu item.

Keyboard Shortcuts

Many of the features of Practice Manager can be accessed using Shortcut Keys. Most of the Shortcut keys are Function keys—the keys numbered F1 through F10 or F12 that are normally located at the top of your computer keyboard.

Keyboard Shortcuts for Managing Windows

The following keyboard shortcut keys are used to manipulate windows within Practice Manager, as well as navigate to other applications.

Key	Function	Explanation
Alt + Tab	Next Application	Changes “focus” from the current application to the next open application.
Ctrl + F4	Close	Close the currently open window

Key	Function	Explanation
Ctrl + Tab	Next Window	Changes “focus” from the current window in an application to the next open window in the same application.
Shift + Ctrl + F4	Close All	Close all open windows

Keyboard Shortcuts for Listing Records

The following keyboard shortcut keys are used are used to list existing records in Practice Manager.

Key	Function	Explanation
F6	Open Matters	Open the Matter Listing
F7	Open Entities	Open the Address Book
F8	Open Documents	Open the Document Listing
F9	Open Timeslips	Open the Timeslip Listing
F10	Open Notes	Open the Note Listing
F11	Open GroupWare	Open the GroupWare Listing
F12	Open Workflow	Open the Workflow Listing

Keyboard Shortcuts for Working with Lists

The following keyboard shortcut keys are used when working with lists in Practice Manager.

Key	Function	Explanation
Crtl + Shift + ID	Key	Provides ‘key’ to highlighted record
Ctrl + F	Filter	Display the Filter Creation Dialog
Ctrl + #	Count	Counts Records
Ctrl + D	Delete	Delete the highlighted record(s)
Ctrl + L	Retrieve Filter	Display the Filter Listing

Key	Function	Explanation
Ctrl + N	Current Listing	Create a new record in the Listing currently open.
Ctrl + O	Open	Open the highlighted record in the current listing.
Ctrl + Q	Query	Display the Query Creation Dialog
Ctrl + W	Preview	View a Note, Timeslip or GroupWare
F5	Refresh	Update the current Listing

Keyboard Shortcuts for Creating New Records

The following shortcut keys are used to create new records in Practice Manager using keyboard shortcuts.

Key	Function	Explanation
Shift + F6	New Matter	Create a new Matter
Shift + F7	New Entity	Create a new Entity
Shift + F8	New Document	Create a new Document
Shift + F9	New Timeslip	Create a new Timeslip
Shift + F10	New Note	Create a new Note
Shift + F11	New GroupWare	Create a new GroupWare Item
Shift + F12	New Workflow	Create a new Workflow item

Keyboard Shortcuts for Working with Forms

The following keyboard shortcut keys are used when working with data entry, filter, and query forms Practice Manager.

Key	Function	Explanation
Backspace	Erase	Erases the text to the left of the cursor.
Ctrl + C	Copy	Copy the highlighted text
Ctrl + V	Paste	Pastes the highlighted text
Ctrl + X	Cut	Cut the highlighted text
Delete	Delete	Deletes the highlighted text.

Key	Function	Explanation
Down Arrow	Move Down	♦ If focus is on a multi-line field, pressing the Down Arrow moves the cursor down one line. ♦ If focus is on a list, pressing the Up Arrow move the selection bar up one record.
Left Arrow	Move Left	♦ If focus is on a field, pressing the Left Arrow moves the cursor to the left within that field without erasing the text. ♦ If focus is on a tab label, other than the first one in a tab set, pressing the Left Arrow activates the tab to the left of the active tab. ♦ If focus is on a list, pressing the Left Arrow scrolls the list to the left to display more columns of data.
Right Arrow	Move Right	♦ If focus is on a field, pressing the Right Arrow moves the cursor to the right within that field without erasing the text. ♦ If focus is on a tab label, other than the last one in a tab set, pressing the Right Arrow activates the tab to the right of the active tab. ♦ If focus is on a list, pressing the Right Arrow scrolls the list to the right to display more columns of data.

Key	Function	Explanation
Up Arrow	Move Up	♦ If focus is on a multi-line field, pressing the Up Arrow moves the cursor up one line. ♦ If focus is on a list, pressing the Up Arrow move the selection bar up one record.
Tab	Advances to the next window element.	When a window opens, one window element has focus. This is typically a field or button. Pressing Tab changes focus to the next element in the tab order of the window. After the last element, pressing Tab returns you to the first element on the window.
Shift + Tab	Returns to the previous window element.	Pressing Shift + Tab changes focus to the previous element in the tab order of the window. From the first element, pressing Shift + Tab takes you to the last element on the window.

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Using Listings

What are Listings?

Practice Manager organizes Matter information into separate modules. As you work with Matters, you make individual entries of information into these modules, called records—a Timeslip, an Entity, a Note, a Document Profile or a Workflow Item. To make it easier to access and work with these records, Practice Manager organizes them into Listings. Listings display your records in a columnar or grid format, enabling you to see many entries at a glance as well as sort and organize information as you wish.

Listing Functions

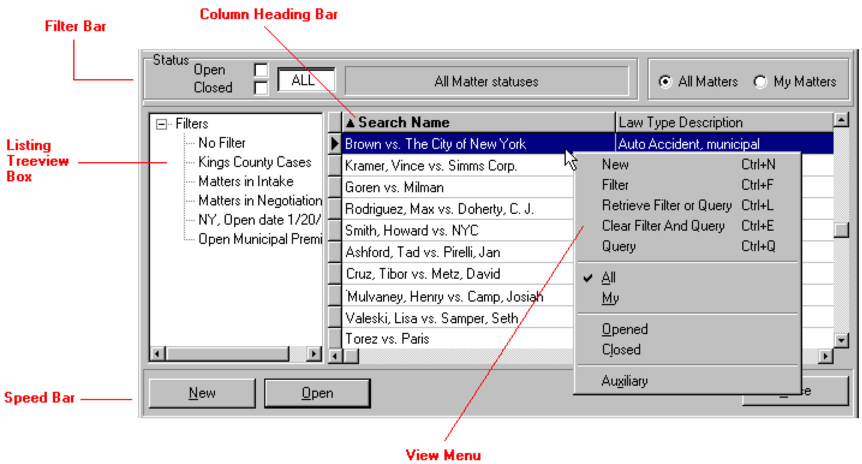
Listings allow you to organize information in ways that help you the most. When you work with one of the Listings in Practice Manager, you can:

- **Customize the Listing Layout**. You can choose the number, size and order of the fields to display as columns in the Listing Layout.
- **Sort the Listing**. You can sort records by any displayed field (column), in ascending or descending order.
- **Filter the Listing**. You can “filter” or limit the number of records displayed, using QuickFilters—filters that are built into Practice Manager Listings—User-defined Filters or more advanced Queries.
- **Search the Listing**. A convenient QuickSearch window allows you to quickly locate any record in a Listing, simply by typing in a few letters.
- **Open, Modify and Delete Records**. Once you have found the record you want in the Listing, you can open it, modify it or delete it.

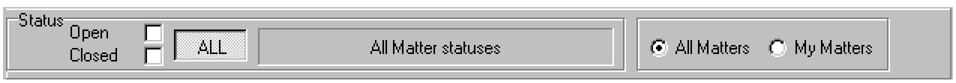
- **Print the Listing**. You can organize, filter and sort the Listing display as you wish, then preview it on your computer screen and print it to create reports.

Listing Components and Controls

In order to use Listings to organize information, you should become familiar with Listing components and controls. All Listings have similar components and controls. Below, for example, is the **Matter Listing**:



Filter Bar



Use the **Filter Bar** to access **QuickFilters.** QuickFilters are filters that are built-in to Practice Manager. There are three types of controls on the Filter Bar used to select QuickFilters:

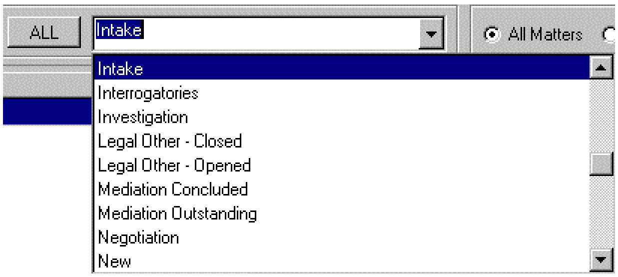
- **Checkbox control.** Click on a checkbox to activate or enable a QuickFilter. A "✓" will appear. Click again to remove the "✓" and de-active the QuickFilter. You can also use the Tab key to move among controls on a Listing until the Checkbox is highlighted and then use the Spacebar to activate the checkbox. Use a checkbox to activate QuickFilters cumulatively. For example, in the Matter Listing, enabling the Open checkbox displays all Matters that have been opened; enabling the Closed checkbox will **also** display all Matters that have been closed.

- **Radio buttons**. Click on a radio button to activate a single QuickFilter from a group of two or more filters.

You can also use the Tab key to highlight the QuickFilter and then press the Spacebar to select it. The selections chosen by a Radio button are mutually exclusive. Thus, on the Matter Listing, you can only limit the listed Matters to all Matters (**All Matters**) or your Matters (**My Matters**).

- **Drop-down list.** A drop-down list gives you the choice of restricting the records displayed to those that meet a single criteria. The drop-down list is activated by the **All** button, which works like a toggle switch. When the **All** button is in the depressed position all records are displayed.

Clicking once on the **All** button when it is depressed releases the button and discloses the first item on the list. Click on the drop-down arrow to display the list and click on one of the choices to make a selection.

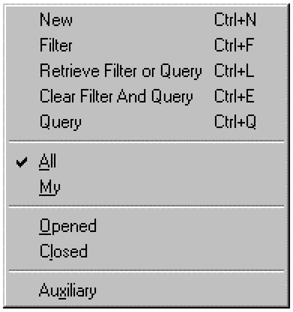


Speedbar

The **Speedbar** contains the controls used to create, view and edit records and close the Listing Display.

View Menu

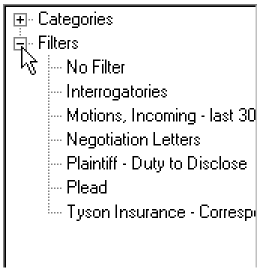
The **View Menu** contains the same commands as the Filter Bar and features some additional QuickFilters and controls.



To display the View Menu, select **View** from the Practice Manager Menu Bar or place your cursor over the Listing itself and click the Right Mouse Button. If you do the latter, the View Menu will display in the middle of the Listing.

TreeView panel

The TreeView panel provides convenient access to saved filters.



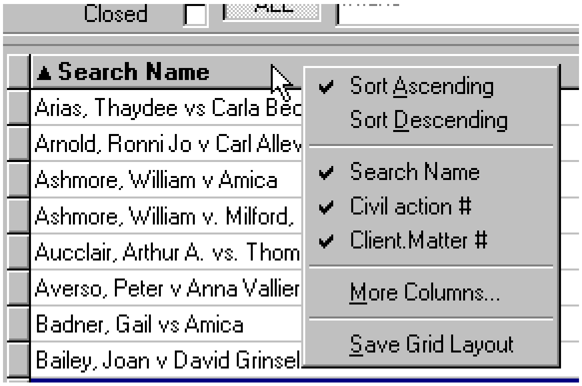
Apply and close filters quickly and easily right from the Listing screen. Selections are laid out in Windows Explorer-like format for easy viewing and access. The Matter Document Listing TreeView panel, pictured below, also includes the Quickfilter for Categories. . Access to the TreeView panel is activated in User Preferences by selecting the checkbox for Float TreeView in Matter on the General tab. See **Applying Filters from the Listing TreeView panel** for details.

Column Heading Bar

The **Column Heading Bar** is the component of a Listing that displays the names of the columns in the Listing. To sort the listing by a particular field, simply double-click on that column heading. See **Sorting Listings** for details. You can also change the order of the fields by clicking once on a Column Heading and dragging it to another position on the Column Heading Bar. See **Customizing the Listing Layout**.

Column Control Menu

Use the **Column Control Menu** to select and order fields that are displayed in a Listing. To access the Column Control Menu, place your cursor anywhere on the **Column Heading Bar** and click the Right Mouse Button. The Column Control Menu will be displayed.



Customizing the Listing Layout

Listings display records in columns. You can change the number of columns displayed, their width and placement, and save the resulting layout. The Listing Layout is used as the format for printing reports. You can change the Listing Layout in two ways:

- **Using the Column Control Menu**. You can establish the number of columns displayed and their order by using the Column Control Menu. When you are done, you can save the Listing Layout.
- **Dragging columns**. You can resize columns and move them around the Column Heading Bar by dragging them with the mouse pointer.

To add and remove columns from a listing

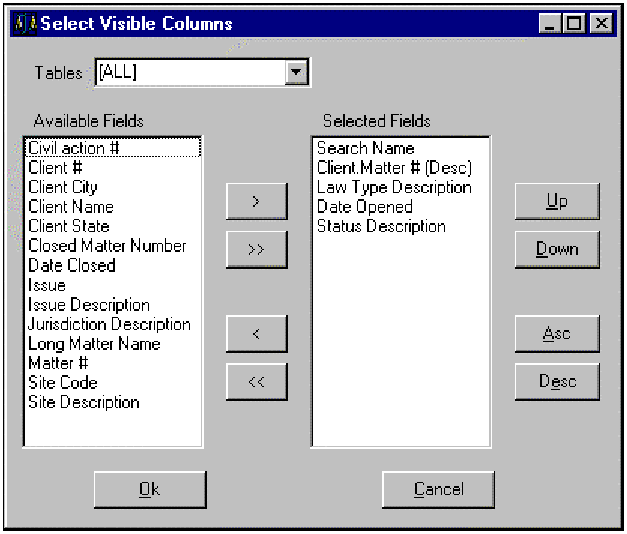
Use the Column Control Menu to choose the fields you want to display in the Listing Layout.

1 Right Mouse Click on the Column Heading Bar to display the Column Control Menu. The fields that are already displayed in the Layout will be marked with a "✓".

2 If the fields you want to display are already present on the Column Control Menu, highlight and then click on each field you want to add. A new "✓" will appear and the Column Control Menu will close. Repeat this process for each column you wish to add.

3 To remove a field, highlight and click on it to remove the "✓".

4 If the fields you want to display are not listed on the Column Control Menu, display the Column Control Menu and click on **More Columns**. This will display the **Select Visible Columns** dialog, containing all the fields that can be selected.



- To add a field, highlight the field name in the Available Fields pane and click on the Assign button. You will then see it appear in the Selected Fields pane.

- To add all of the remaining fields, click on the Assign All button.

- To remove a field, highlight the field name in the Selected Fields pane and click on Unassign button. You will then see it appear in the Available Fields pane.

- To remove all of the fields from the Selected Fields pane, click on the Unassign All button.

5 When you are done, click **OK.** All of the columns you have selected will appear on the Listing Layout.

6 To save the new Listing Layout, right mouse click on the **Column Heading Bar** and select **Save Grid Layout** from the menu.

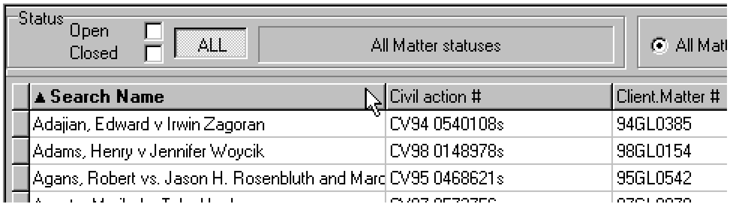
Note

The new Listing Layout will not take effect unless you remember to Save the Grid Layout. . This new Listing Layout is specific to the User and is not a system-wide change.

To change the size of a column on the listing

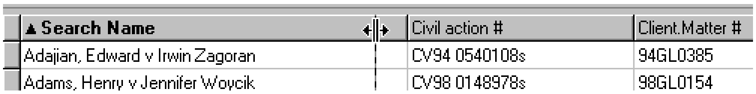
Use the following procedure to change the size of a column on the current listing.

1 Up on the **Column Heading Bar**, move the mouse pointer to the right edge of the column you want to resize.



2 Move the Mouse pointer to the border between this and next column until its shape changes to short vertical lines separating opposing arrows. Click and hold the Left Mouse Button.

3 To change the size of the column, drag the Mouse Pointer to the right or the left, while still depressing the Mouse Button. Release the Mouse Button when the column reaches the size you want.



4 To save the new Listing Layout, right mouse click on the **Column Heading Bar** and select **Save Grid Layout** from the menu.

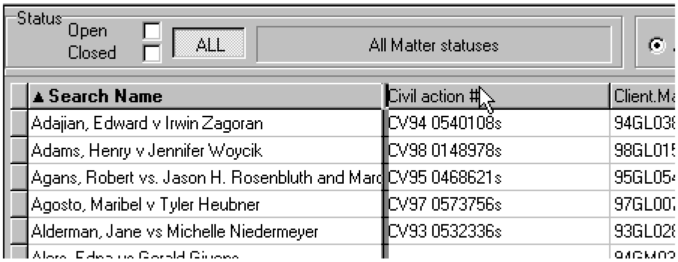
To change the postion of columns on a listing

Using the mouse…

Use the following procedure to change the placement of columns on a listing using the mouse:

1 Move the mouse pointer onto the **Column Heading Bar** over column you want to move.

2 Click on the column heading. A black vertical line will appear on the left edge of the column.



3 While holding the Left Mouse Button, move the mouse pointer to the right or to the left. The vertical line will follow the cursor. When the black vertical line is in the spot where you wish to put the column, release the Mouse Button and it will be placed there.

4 Repeat the foregoing steps for each column you want to move.

5 To save the new Listing Layout, right mouse click on the **Column Heading Bar** and select **Save Grid Layout** from the menu.

Using the listing control menu…

Use the following procedure to change the placement of columns on a listing using the listing control menu:

1 Click on the **Column Heading Bar** and then click the Right Mouse Button to display the **Column Control Menu**.

2 Click on **More Columns** and the **Select Visible Columns** dialog will open.

3 You can set the order the Column Headings by moving them up or down in the Selected Fields list at the **Select Visible Columns** dialog.

- To move a Column Heading up in the list, highlight the Column Heading name and hit the **Up** button.
- To move a Column Heading down in the list, highlight the Column Heading name and hit the **Down** button.

4 Click on **OK** when you are done.

5 To save the new Listing Layout, right mouse click on the **Column Heading Bar** and select **Save Grid Layout** from the menu.

Sorting Listings

Any field displayed on the **Column Heading Bar** can be used to sort a Listing. You can choose to sort the Listing in ascending or descending order, alphabetically or numerically, depending upon the type of field. For example, you will normally sort the Matter Listing by using the Search Name as the Sort Field and by setting it to sort in ascending alphabetical order from “a” to “z”. However, you could also sort Matters by Matter Number.

To select the sort field and set the sort order for a listing

From the Listing…

Use the following procedure to select the sort field and set the sort order for a listing from the listing, itself:

1. Display the Listing you wish to view. If the field to be used for sorting does not appear as a column heading on the Listing, add the desired column to the Listing display. See **Customizing the Listing Layout**.
2. To designate a field as the sort order field, double-click on the **Column Heading Bar** of that field’s column. The field will automatically be sorted in ascending order, indicated by the ▲ symbol.
3. To reverse the sort order of the field,
   - Double-click on the **Column Heading Bar** again
   - Right Mouse Click on the heading of the column to be used for sorting to display the **Column Heading Menu** and choose **Sort Ascending** or **Sort Descending** from the list of choices.
     The ▼ symbol will indicate that the field is sorted in descending order.

     The new sort order will remain in effect until you close the Listing.
4. To **Save** the selected sort options, right mouse click on the **Column Heading Bar** and select **Save Grid Layout** from the **Column Heading Menu**.

From the Visibles Columns dialog…

Use the following procedure to select the sort field and set the sort order for a listing from the listing, itself:

1. To open the Select Visible Columns dialog (see **Customizing the Listing Layout**), right mouse click on the **Column Heading Bar**.
2. The **Column Heading Menu** will display. Select More Columns.
3. The Select Visible Columns dialog will open. From the Selected Fields pane highlight the field to be used for sorting.
4. Hit the **Ascending** or **Descending** button.
5. Click **OK**. The new sort order will remain in effect until you close the Listing.
6. To **Save** the selected sort options, right mouse click on the **Column Heading Bar** and select **Save Grid Layout** from the **Column Heading Menu**.

Searching for Records in Listings

To open an existing record, you must be able to find it quickly in a Listing. If the Listing contains numerous records, making it too time-consuming to scroll down the list, you can use the **QuickSearch Window** to locate an entry. Before using QuickSearch, you may want to limit the number of records listed in the Listing. You can do this by using **QuickFilters**, a **User-defined Filter** or a **Query**.

Simple Search Using the QuickSearch Window

Every Listing includes a QuickSearch Window used for locating records. The QuickSearch Window allows you to search for a record using a single field.

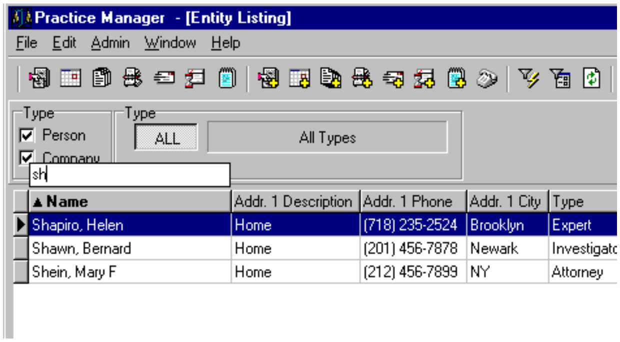
To search for records using the QuickSearch window

1. Choose the field to be used for the search by making it the Sort Field in the Listing.

   For example, you might use the Name field to search for an Entity or the Matter No. Field to search for a Matter by number. In order to search in a field, you must make that field the designated Sort Field--the field by which the listing is sorted. To do so, double-click on the **Column Heading Bar** until either ▲ or ▼ appears. See **Sorting Listings**.

2 Start to type characters that match the information for the record you are seeking.

The QuickSearch Window will not be visible until you start typing. When you enter the first character, it will open just above the Listing, displaying what you have typed. As you enter letters, Practice Manager will locate the first record that matches the characters entered in the window.



3 Continue typing until the record you are seeking is reached.

Practice Manager will actually display all records that match the letters or other characters you have typed until you have typed characters that uniquely match a single record.

4 If you hit Enter the record will open.

NOTE: If the Enter key is depressed prior to completing the search field, the record that meets the search criteria at the time the Enter key is depressed will be the record that is opened. This is a common user error.

5 To clear the QuickSearch window,

- Delete the characters in the Search Window
- Hit the Esc key on your keyboard
- Double-click on another column heading in the listing to make it the active sort order field.

To QuickSearch for records using a “*” wildcard character

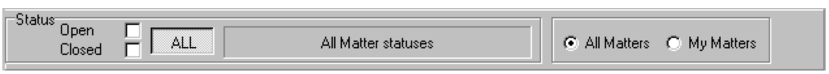
A QuickSearch searches for records that **begin with** characters you enter in the QuickSearch window. It requires precision, and if the first character you type is not the same as the first character in the field, the record will not be located. For instance, when searching for the Matter “John Doe—Simple Will”, typing in the letters “Doe” in the Search Name field will not locate the Matter. To enable you to locate records, where the search characters are located within, but not at the beginning, of the field, you can include the “wildcard” search character—“*”—before and after the string of characters or numbers. A “wildcard” is a character that takes the place of other characters. For instance, to find the Matter in the previous example, you would type “*Doe”. QuickSearch would read this as “Any combination of characters followed by “Doe”, and skip over all characters until it found the first record containing the letters “Doe”.

Using QuickFilters

A Filter is the mechanism used by Practice Manager to select particular groups of records to be displayed in a Listing. It is a tool you will use to limit a given listing down to a specific group of records you wish to isolate and view. To be included, the records must meet the criteria specified in the Filter; all other records are screened out. Each Listing in Practice Manager includes several easy-to-access built-in filters called **QuickFilters**. QuickFilters appear above the listing at all times and allow a quick selection of records relevant to the primary purpose of the Listing. For instance, in the Entity Listing, a QuickFilter allows you to select Entities of a particular Entity Type, say “Client”.

To Access QuickFilters

QuickFilters are located on the Filter Bar located above the listing and just below the Practice Manager Toolbar.



There are three types of controls used to select QuickFilters—checkboxes, radio buttons and drop-down lists. The use of these controls is explained in **Listing Components and Controls**.

The specific QuickFilters available in the Listings for each module of Practice Manager is discussed in that module’s chapter.

Creating User-defined Filters

Practice Manager gives you the ability to create your own Filters to select and display different groups of records for each type of Listing in the program. User-defined Filters can employ complex selection criteria. They can be created and applied on an ad hoc basis or saved and retrieved at any time. User-defined Filters can be used to find one or more particular records or to display groups of records. Combined with a customized Listing Layout, a User-defined Filter can be used to generate detailed custom reports for your office.

By making appropriate selections in Preferences, you can choose to automatically apply a Filter, choose a Filter from a list or create a Filter when you open a particular Listing. See **Setting Filter Options for Listings**.

For additional tips and further examples of Filters, consult the discussion of Filters for each of the separate modules of Practice Manager.

To access the listing filter creation screen

Each type of Listing employs its own Filter Creation Dialog because in each case, different criteria are relevant. To access the Filter Creation Dialog:

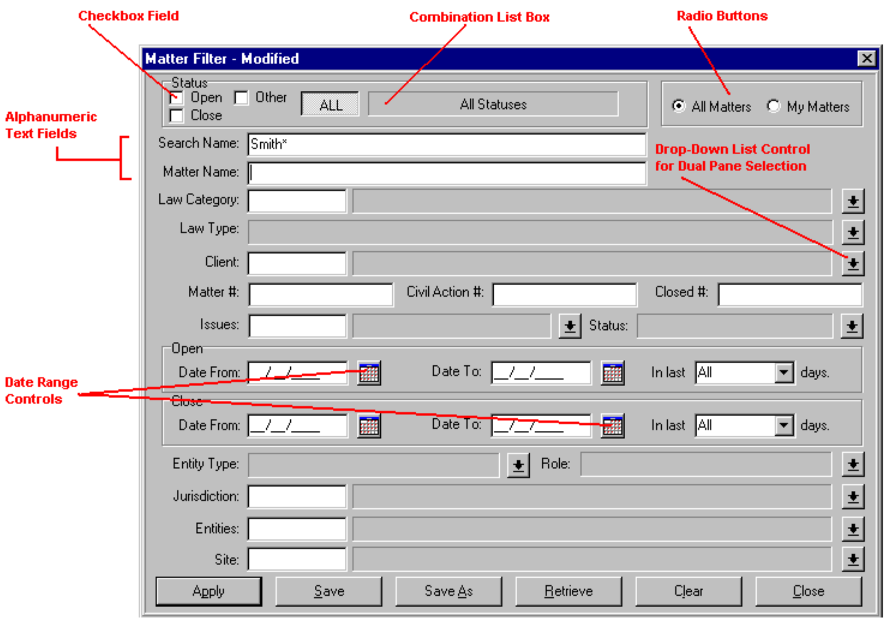
1. Display the Listing in question.
2. Display the Listing in question.
3. Select **Filter** either from the **View Menu** or the toolbar:

   - Click on **View** and then select**Filter** in the Practice Manager Menu
   - Click the Right Mouse Button and select Filter from the menu
   - Hit the Filter  button on the Practice Manager toolbar

   The Filter Creation Dialog will be displayed.

To entering filter criteria for a listing

Specify the criteria that will be used to filter records by entering information into fields in the Filter Creation Dialog. For a record to be included in your filtered group, the fields in the record must match the criteria entered in the fields of the Filter Creation Dialog. The Filter Creation Dialog contains several different kinds of fields:



Alphanumeric Text Fields. These fields accept alphanumeric characters--numbers or letters. The characters entered in the fields must exactly match the characters in the records being selected. However, if you place the **Wildcard** character "*" (an asterisk) after an alphanumeric string, you will locate all records that begin with that string; and if you place a "*" before <u>and</u> after the string, you can locate records that **contain** the characters in that string. For example,

- Entering "Doe*" will find "Doe, John – Simple Will" and any other records that begin with "Doe".
- Entering "*Doe*" will find "John Doe—Simple Will" and any other records that contain "Doe".

Selection from Lists. List Fields included in the Filter Creation Dialog present you with a list of choices. Combination List Fields or Radio buttons, allow you to make a single choice. Dual-pane Selection Dialogs or Checkbox fields, allow you to include several choices in the Filter. When you include multiple selection criteria using a Dual-pane Selection Dialog or Checkbox fields, the Filter will find records that match **<u>any</u>** of the choices. This allows you to create Filters that combine criteria. For instance, to create a Filter showing all Matters handled by the Litigation Department, you would select all litigation Law Types from Law Type field. For more information on the use of controls that allow selections, see **Making Selections from a List**.

Date Ranges. For those Listings that include dates, you can select records that fall within a range of dates. To do so, enter the "From" or beginning date and the "To" or ending date of the date range.

To apply a filter to a listing

Hit the **Apply** button. The Filter will go into effect. A Filter remains in effect, until it is cleared. Thus, if you access the Filter Creation Dialog before the Filter is cleared, all of the Filter criteria you previously entered will still be present. You will also note that when a filter is in effect, a red filter arrow is visible on the upper left of the listing to let you know.

To clear a filter from the listing

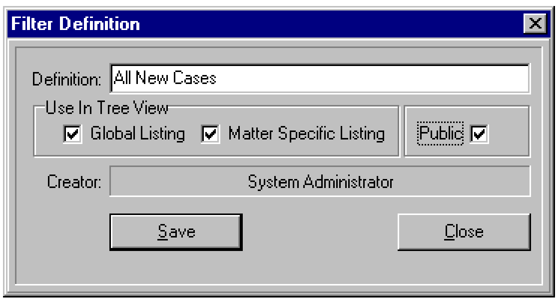
Use any of the following methods to clear previously applied filter criteria from a listing.

- From the menu select View and then select Clear Filter and Query
- Right-click on the listing itself and choose Clear Filter and Query from the menu
- Access the Filter Creation Dialog again and click the **Clear** button then the **Apply** button.

To save a newly created filter

Use the following procedure to save a newly created filter so that it may be retrieved and applied again.

1 Click the **Save** button. The Filter Definition window will appear.



2 Enter a name for the Filter, such as "All New Cases".

3 If you have sufficient user-rights (as defined by your system administrator), and you want the Filter to be available to all Users in your

office, click on Public. Otherwise, the Filter will only be available to the User on the computer where the Filter was saved.

4 Under **Use in TreeView** there are two choices. Select one or both:

- **Global Listing**. Check this box and the filter will appear as a selection under Filters in the TreeView panel of the Listing in question.

- **Matter Specific Listing.** Check this box and the filter will appear as a selection under **Filters** in the TreeView panel for the listing in question within a matter.

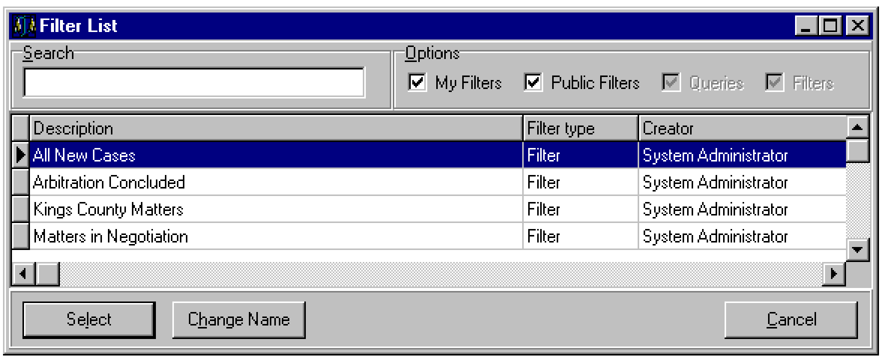
5 Click **Save** when you are finished.

To retrieve a previously saved listing filter

From the View menu…

Use the following procedure to retrieve a previously saved listing filter using the **View** menu:

1 From the menu select **View** and then select **Retrieve Filter or Query** (To access the View menu, see **Listing Components and Controls**.) or right-mouse click on the listing and select **Retrieve Filter or Query** from that menu. A Filter List will be displayed.



2 Highlight the Filter you want to use and hit the **Apply** button. The Filter will go into effect. (The Filter will remain in effect until it is cleared.)

From the TreeView panel…

Use the following procedure to retrieve a previously saved listing filter from the **TreeView panel**:

1. Open the Listing in which you saved the Filter.
2. In the TreeView panel on the left, hit the ⊞ to the left of Filters. The list of saved filters will appear.
3. Double-click on a selection and the filter will be applied.
4. To Clear the filter select **No Filter** from the list of available filters.

To copy a existing listing filter

Use the following procedure to copy a previously saved listing filter, so that it may be modified, applied and/or saved as a new filter:

1. Retrieve the Filter as described above and apply it.
2. Click Filter from the View Menu. The Filter Creation Dialog will be displayed. All of the criteria contained in the retrieved Filter will be in effect.
3. To copy the Filter, click the Save As button. The Filter Definition Dialog will appear (see above).
4. Enter a name for the new Filter in the Definition Field in lieu of the name already present.
5. Click the **Save** button when you are finished. Click **Cancel** to close the Filter Definition Dialog.

To delete an existing listing filter

Use the following procedure to delete a previously saved query:

1. From the **View Menu** click **Retrieve** to display the Filter List.
2. Highlight the Filter you want to delete and click **Delete.** A dialog will appear.

3 Click **Yes** to delete the Filter; click **No** to cancel the deletion.

NOTE: If you cannot delete a particular filter, contact your system administrator. Some users may not have "rights" to delete certain filters.

Using Queries to Filter Listings

A Query is a more advanced type of **Filter**. A Query employs a different interface and offers more detailed filtering capabilities. If there is a filter you'd like to set and you don't see the ability to apply in the Filter Creation Dialog, you can most likely do it through a query. For instance, Queries, unlike Filters, can use multiple "and/or" statements and can also select records based upon their failure to match a particular criterion. Like Filters, Queries can also be used to find one or more particular records or to display groups of records and, when combined with a customized Listing Layout, can for the basis for detailed custom reports for your office. Queries can be created and applied on an ad hoc basis or saved and retrieved at any time.

By making appropriate selections in Preferences, you can choose to automatically apply a Filter or display a List of Filter and Query choices when you open a particular Listing. See **Setting Filter Options for Listings**.

Understanding Query Criteria

Unlike Filters, Queries are created in steps. In each step, a specific query statement is constructed which compares the information in a single field to a specific criterion. These query statements can be placed in combination with one another as well. To create a Query Statement, you will select a specific field—the **Query Field**, then choose a **Query Operator** and enter the criteria you are searching for in the **Selection Criterion Field** to select the records. These are your building blocks.

Query Operators

Using a Query Operator, you specify how you want to compare the data contained in the Query Field with the Selection Criterion. Essentially, the Operator qualifies the Criterion. The Query Operator depends upon the type of information being stored in that Query Field. Numeric fields for example will have "greater than" and "less than" as Operator choices, while Text fields will have selections like "Begins with" or "Contains".

One example of a query statement would be **Entity Type** (Query Field) **Not equal to** (Query Operator) **Attorney** (Criterion). This query would give us a list of all Entities except Attorneys.

The four types of query fields are: Text, List Choices, Numbers and Dates. You will have the following choices:

Key	Function	Explanation
Text	[] Contains	A record in the Listing will meet the selection criterion, if the data contained in the selected field of the record … Contains the characters—letters or numbers—entered as the Selection Criterion in the Selection Criterion Field
	|-> Begins with	Begins with the specified characters
	= Matches	Matches the specified characters exactly
	<> Not Contains	Does not contain the specified characters
List Choices	= Matches	Matches the list choice entered in the Selection Criterion Field
	<> Not Equal	Does not match the selected list choice
Numbers	= Equal	Equals the number entered in the Selection Criterion Field exactly
	! Not Equal To	Is not equal to the specified numbers
	< Less Than	Is less than the specified numbers
	<= Less than or Equal	Is less than or equal to the specified numbers
	> Greater Than	Is greater than the specified numbers

Key	Function	Explanation
	>= Greater Than or Equal	Is greater than or equal to the specified numbers
Dates	On Date	Is the date specified in the Selection Criterion Field
	After Date	Is a date after the specified date
	On or After Date	Is a date on or after the specified date
	Before Date	Is a date before the specified date
	On or Before Date	Is a date on or before the specified date

Statements and Groups

After a specific Query Statement is created, you have the option to end the Query Statement or to create additional Query Statements. Several Query Statements can be combined to form a Query Group. You can specify by using the "and" Query Operator, that a record must meet the selection criteria of **all** Query Statements or by using the "or" Operator that it can meet **any** one of the Query Statements.

Working with Queries

To access the query creation window

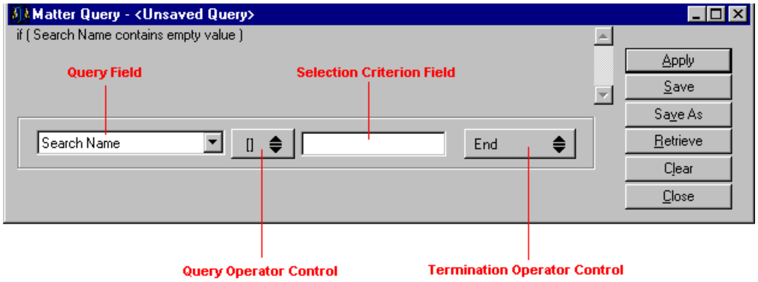
Each type of Listing employs a module-specific Query Creation Dialog to create Queries for that Listing. The Query Creation Dialog contains two fields—the Query Field and Query Selection Field—and a control that displays the Query Operators. To access the Query Creation Dialog:

1 Display the Listing in question.

2 Select **Query** from either the View Menu or the toolbar:

- From the menu, select **View** and then select **Query**
- Right mouse click on the Listing and select **Query**
- Hit the Query Button  on the toolbar

The Query Creation Dialog will be displayed.



To create a query statement

Use the following procedure to create a query statement:

1 Hit the dropdown button for Query Field and make a selection.

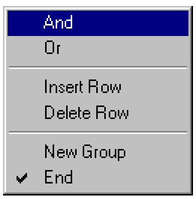
2 Hit the Query Operator button  and select your operator. As explained above, choices here depend on the nature of the Query Field.

3 Enter the criterion being used to select the records in the Listing in the Selection Criterion Field.

- If the Query Field accepts text, you will enter specific characters in the Selection Criterion Field—either letters or numbers.
- If the Query Field requires selection of an option from a list, the list will appear in the Selection Criterion Field and you will select one of the choices.
- If the Query Field accepts only numbers, you will enter numbers in the Selection Criterion Field.
- If the Query Field accepts dates, you will enter the date in numbers or choose a date from a Calendar by clicking on the Calendar Control icon. See **Entering Dates and Time**.

4 Click on the Query Termination control 

and make a selection from the list that appears.

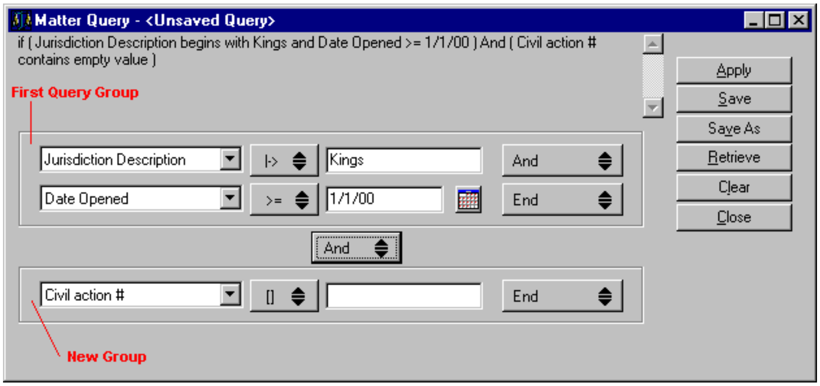


- Click **End** to complete a specific Query Statement.

- Click **And** to start a new Query Statement and specify that the records on the listing must satisfy both the Selection Criterion in the current Query Statement **and** also the following Query Statement.

- Click **Or** to start a new Query Statement and specify that the records on the listing must satisfy either the Selection Criterion in the current Query Statement **or** the following Query Statement.

- Click **New Group** to start a New Group. All of the Query Statements previously created—or created since the last Group of Query Statements was formed—will be included in a Group and a new Group of Query Statements will also be started.



Each Query Group will be treated like a single Query Statement. A new Operator Control will appear below the first Query Group.

*Again, if you select **And**, the records in the Listing will be required to meet the Selection Criteria specified in both the previous Group **and** the succeeding Query Group.*

*If you select **Or**, the records in the Listing will be required to meet the Selection Criteria specified in the previous Group **or** the succeeding Query Group.*

- If you want to insert a new Query Statement at any point, click on a Query Termination Control for a particular Query Statement and select **Insert Row**.

- If you want to delete a specific Query Statement, click on a Query Termination Control for that Query Statement and select **Delete Row**.

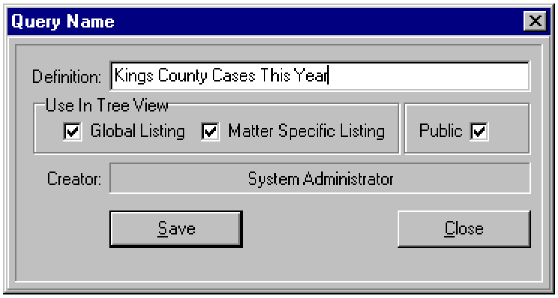
Note

If you want to delete all of the Query Statements in a Query and start over, click Clear on the Query Creation Dialog

To save the query

Use the following procedure to save a query.

1 Select **File** and then select **Save** from the Menu located on the Query Creation Dialog. A dialog will appear.



2 Enter a name for the Query.

3 If you want the Query to be available to all Users in your office, click on **Public**. Otherwise, the Query will only be available to the User on the computer where the Query was saved.

4 Under **Use in TreeView** there are two choices. Select one or both:

- **Global Listing.** Check this box and the query will appear as a selection under **Filters** in the TreeView panel of the Listing in question.

- Matter Specific Listing. Check this box and the query will appear as a selection under Filters in the TreeView panel for the listing in question within a matter.

5 Click the **Save** button when you are finished. This will bring you back to the Query Creation Dialog.

6 To close the Query Creation Dialog, click on **Cancel.**

To apply the query

To apply the selection criteria contained in the Query, click the **Apply** button on the Query Creation Dialog.

The Query will go into effect. A Query remains in effect, until it is cleared. You will note that when a query or filter is in effect, a red filter arrow is visible on the upper left of the listing to let you know.

To clear a previously applied query

Use the following procedure to clear a previously applied query.

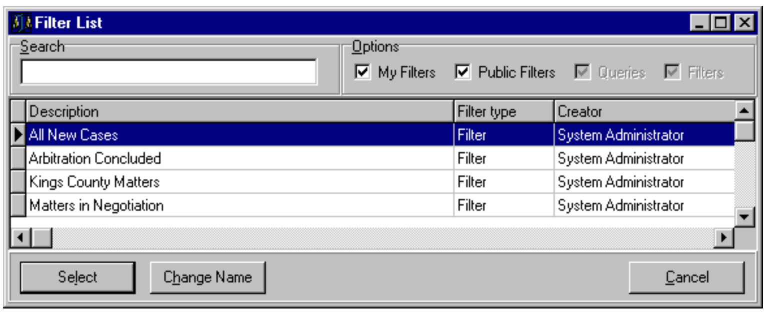
1. Choose Clear Query and Filter from the View Menu
2. Open the Query Creation Dialog again, hit **Clear** then **Apply**
3. From the TreeView Filter menu, double_click on **No Filter**

To retrieve a previously saved query

From the View Menu:

Use the following procedure to retrieve a previously saved query using the **View** menu:

1. Click on **Retrieve Filter or Query** in the **View Menu**. A List of Filters and Queries will be displayed.



2. Highlight the Query you want to use and hit the **Apply** button. The Query will go into effect. (The Query will remain in effect until it is cleared.)

From the Treeview Box:

Use the following procedure to retrieve a previously saved query from the **TreeView panel**:

1 Open the Listing in which you saved the Filter.

2 In the Treeview box on the left, hit the ⊞ to the left of Filters. The list of saved filters will appear.

3 Double-click on a selection and the filter will be applied.

To copy a query

Use the following procedure to copy a previously saved query, so that it may be modified, applied and/or saved as a new filter:

1 Click Query from the View Menu. The Query Creation Dialog will be displayed.

2 Select File and then select Open. The list of Queries will be displayed.

3 Choose the Query you want to copy from the List and click Select.

4 To copy the Query, click File and then select Save and save the Query under a new name, as described above.

To delete a query

Use the following procedure to copy a previously saved query:

1 From the View Menu select Retrieve Filter or Query.

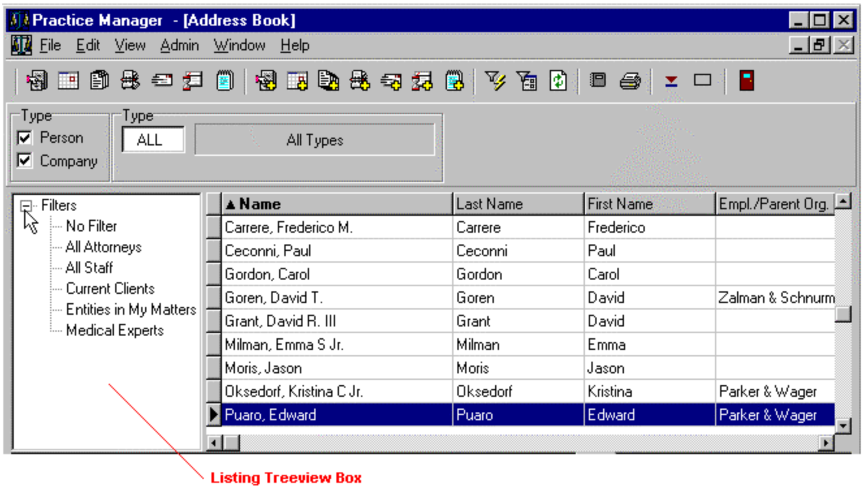
2 On the list, highlight the Query you want to delete and click **Delete.** A dialog will appear.

3 Click **Yes** to delete the Query; click **No** to cancel the deletion.

NOTE: If you cannot delete a particular filter, contact your system administrator. Some users may not have “rights” to delete certain filters.

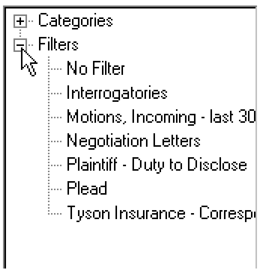
Working with the TreeView Panel

All listings (with the exception of the Issues Listing) feature a TreeView Panelto the left. You can use the TreeView panel to access and apply saved User-defined Filters and Queries expediently.



To retrieve a saved filter from the TreeView panel

The TreeView panel includes a convenient Filter retrieval feature. Illustrated below is the Document Listing TreeView.



Displayed in Windows Explorer-like format, the TreeView Filter option allows you to view saved User-defined Filters and Queries at a glance and make a selection from the list. The filters available are those that have been created and saved by users for later application.

To view saved filters in the TreeView panel

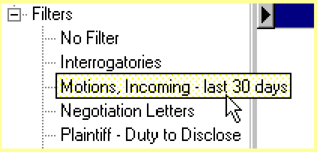
The TreeView panel contains an expandable/collapsible tree, which simplifies access to the list of saved filters.

- Click the ⊞ to the left of **Filters**, or
- Simply double-click on **Filters**.

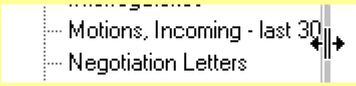
The ⊞ will change to a ⊟ and the list of filters will open.

Note

If a filter name is too long to display completely in the TreeView panel, simply pass your cursor over it and the full name will appear in a pop-up.



Or you can expand the width of the TreeView panel by running your cursor over the right edge of the box until it turns into a double arrow. Then click and drag to the desired size.



To apply a saved filter from the TreeView panel

To apply a filter, simply click on it.

When a filter or query is in effect, a red filter arrow is visible on the upper left of the listing to let you know and the title window will reflect the title of the query that is in effect.

To apply a saved filter from the TreeView panel

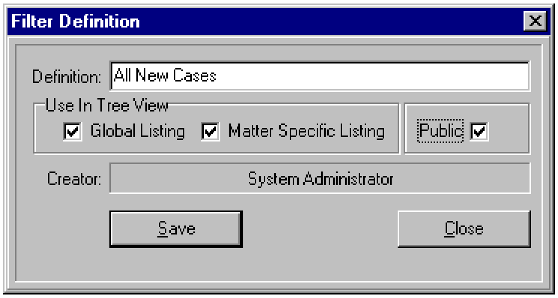
To clear the filter, click on the **No Filter** option.

To retrieving a Quickfilter from the TreeView panel

The Matter Document Listing also features Quickfilters in the TreeView panel. Quickfilters are normally found on the Filter Bar above the listing but also can appear in the TreeView panel for convenience. In the illustration above, you see that the TreeView panel features access to the **Category** quickfilters. You will view and apply Category filters from the TreeView panel in the same fashion that you would apply a saved filter. See instructions above.

Why don't all saved filters appear on the TreeView panel

For a saved filter to appear here in the Treeview box, this option must have been specified when the filter was saved originally. You can do this by checking off the appropriate boxes in the Save Filter dialog:



Under **Use in Tree View** there are two choices. Select one or both:

- **Global Listing.** Check this box and the filter will appear as a selection under **Filters** in the Treeview box of the Global Document Listing.
- Matter Specific Listing. Check this box and the filter will appear as a selection under Filters in the Treeview box of any Matter's Document Listing.

(For complete details on how to create and save a filter see Creating Filters to Select Records.)

Printing the Listing

To print the current listing to the screen (print preview)

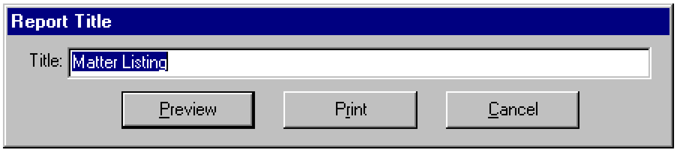
Use the following procedure to print the filtered and sorted active listing to the screen, where is can be previewed before printing to a printer or saved in a file.

1 To start the printing process,

- Click on the Print  button located on the Practice Manager Toolbar
- Select **File** and **Print** and then select **Printer** from the Practice Manager Menu.

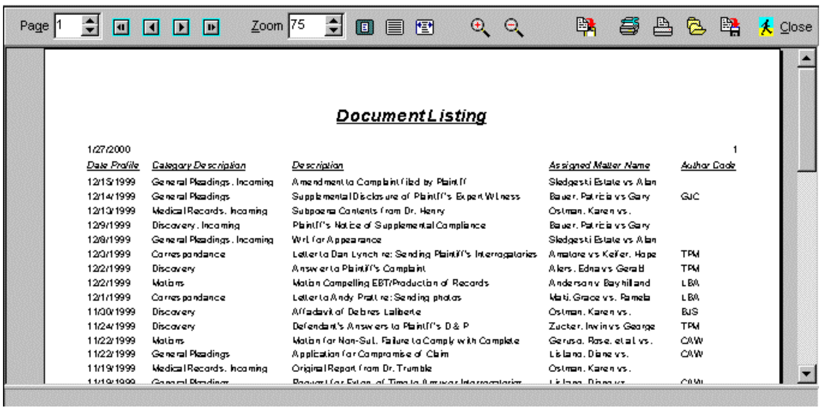
This will display the Print menu.

2 Click **OK** on the Print Menu. The Report Title dialog will be displayed.

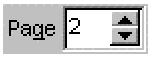
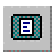


3 Enter a new Title for the report or accept the Title already present.

4 To preview the Report, click on **Preview**. The report will be displayed on your computer screen.



5 The Preview Window has its own toolbar, from which you can do the following:

Button	Function	Explanation
	**Jump to Page**	Manually enter the page number that you would like to preview or use the arrows to select a page number.
	**First Page**	Click to advance to the first page in the report.
	**Previous Page**	Click to advance to the previous page in the report.
	**Next Page**	Click to advance to the next page in the report.
	**Last Page**	Click to advance to the last page in the report.
	**Zoom to 100%**	Click on the icon and the size of the display will increase to fill the screen.
	**Zoom to Page Width**	Click on the icon to set the size of the display to page width.
	**Preview**	Click on the icon to set or return the size of the display to page preview mode.
	**Zoom In**	Click the icon then click on the report itself to zoom in by increments of 10%. While the button remains depressed simply repeat clicking on the display to magnify as many times as you wish.
	**Zoom Out**	Click the icon then click on the report itself to zoom out by increments of 10%. While the button remains depressed simply repeat clicking on the display to magnify as many times as you wish.

Button	Function	Explanation
	**Zoom**	Enter the zoom level you want in percentage points.
	**Copy to Clipboard**	Click the icon to put report contents on your workstation's clipboard. You can then paste the data into another application.
	**Printer Setup**	Change print options by clicking on the icon.
	**Print**	Print the report by hitting the icon.
	**Open Report from File**	To open a previously saved report, hit the icon. A browse box will open allowing you to access reports that you have saved using the Save Report to File option on the Preview toolbar.
	**Save Report to File**	The icon allows you to save the display as a file that you can open again here at the Print Preview screen. These files are Quick Report Files (*.qrp) to be used with Practice Manager only. This option is not to be confused with the **Print Report to File** section. Following the instructions in the section below will save your report as a text file (*.txt), which is compatible with word-processing and other programs outside of Practice Manager that you may want to use to further manipulate the data.
	**Close**	Close the preview display by clicking on the icon.

To print the current listing to a printer

Use the following procedure to print the filtered and sorted active listing directly to the printer:

1. Click on the print icon located on the Toolbar or select **File** and then **Print** and then select **Printer** from the Practice Manager Menu. This will display the Print Setup dialog.
2. Make any changes to Print Setup options and press **OK.** The Report Title dialog will be displayed.
3. Enter a new Title for the report or accept the title already present.
4. If you want to review the report on the screen before printing it, click on **Preview**. If not, click on **Print** to print the report immediately.
5. If you chose to preview the report, you can print the report by clicking on the print icon located on the toolbar at the top of the report.

To print the current listing or report to a file

Use the following procedure to print the filtered and sorted active listing to a file:

1. Select **File** and then **Print** and then select **File** from the Practice Manager Menu.
2. Choose a directory for the file, enter a name in the **File name** field and click on **Save**. This will save the report as a .txt or text file, compatible with many other programs. (It is not necessary to enter the "txt" extension at the end of the filename.)
3. Enter a name for the Report in the Report Title dialog.
4. Click **Print.** The report will print to the file you have created.

The file will be in ASCII format and can be edited and printed from a text editor or using your word-processor. You can also drag and drop the file from Windows Explorer into Practice Manager. See **Copying Document Created Outside Practice Manager**.

Creating, Viewing, Modifying and Deleting Records from a Listing

You can create, view, modify or delete records from the Listings. In fact, to view, modify or delete a record you must first display the Listing. Adding a record, however, can be accomplished in other ways; you need not do it from the listing. (The various ways to create a record not reviewed here will be discussed in the Chapters focusing on the specific modules of Practice Manager). Once the Listing has been opened, you first must locate the record in question. If the Listing contains numerous records, you may want to narrow the number of records displayed by using a **QuickFilter**, **User-defined Filter** or **Query**. Or you can use the QuickSearch Window to search for the record. See **Searching for Records in Listings**.

To create a record from listing

Use the following procedure to create a new record of the type displayed on the active listing:

1. Display the Listing.
2. Hit the **New** button on the Listing's Speedbar. The record entry screen will display.
3. Enter the requested information.
4. Click on **Close** when you are finished.

To view or modify a record from the current listing

Use the following procedure to view or modify an existing record from the active listing:

1. Display the Listing.
2. Locate and highlight the record in the Listing.
3. Click on **Open** in the Listing's Speedbar or double-click on the record. The record entry screen will display.
4. Make any changes to the record.
5. Click on **Save** to save the record before you exit.
6. Click on **Close** when you are finished.

To delete a record from the current listing

Use the following procedure to delete an existing record from the active listing:

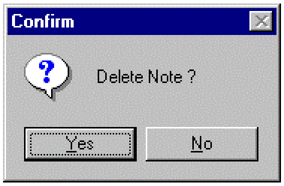
1 Display the Listing where the record is located.

2 Locate and highlight the record in the Listing.

3 To delete the record:

- Strike Ctrl + D
- Select **File** and then select **Delete** from the Practice Manager Menu.

4 To ensure that you do not mistakenly delete a record, a dialog will appear, asking you to confirm the deletion:



- Click on **Yes** to confirm the deletion.
- Click on **No** to cancel the deletion.

Again, for details on creating, modifying and deleting specific types of records, see the chapters on those specific Modules.

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Using TreeView for Matters and Entities

Overview of the TreeView Tab

In Practice Manager relationships between records can be varied and complex. Entities are linked to Matters, issues and other entities. Records from every module are linked to Matters, and Matters themselves can be related to other Matters. There are a number of ways to view these relationships, but the most all-encompassing and versatile is the TreeView feature found within Matter and entity records.

When you open a Matter or Entity Record you will see a tab labeled **TreeView**. (See **Accessing the Entity TreeView Tab** and **Accessing the Matter TreeView Tab**.) The TreeView tab contains a convenient graphical representation of all records linked to that particular Matter or Entity, enabling you to see complex relationships at a glance. Laid out in Windows Explorer-type format, this display is organized by module and each module contains a listing of related records.

The TreeView tab allows you to view relationships to the Entity or Matter record you have open, as well as the capability to add, edit, and remove these links. The TreeView Tool Bar at the top of the tab provides you with access to these functions and also allows you to filter and format the listings.

From the TreeView Tab you are able to:

- **View** all related records
- **Create** new relationships between records
- **Modify** or remove a relationship
- **Filter** record listings on the TreeView tab for easier viewing
- **Change** the listing layout of any module as it appears on the TreeView tab

To access the Matter TreeView tab

To access a Matter's TreeView tab:

1. Open an Existing Matter.
2. Click the tab labeled **TreeView**.

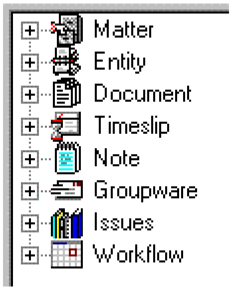
To access the Entity TreeView tab

To access an Entity's TreeView tab:

1. **Display an Entity Listing**, either the Global Entity Listing or the Matter Entity Listing, where the name of the Entity appears.
2. Locate the Entity record for the Entity to whom other Entities will be related and highlight it in the listing. You can use **QuickFilters**, a User-defined **Filter** or a Query to limit the number of Entity records displayed, see **Filter the Entity Listing** or use the QuickSearch Window to find the Entity record, see **Searching the Entity Listing**.
3. Hit the **Open** button on the lower left or double-click on the Entity. The Entity Record will open.
4. Click the tab labeled **TreeView**.

Working with TreeView

The TreeView tab (within a Matter or Entity) contains listings of entries from all Practice Manager modules that are directly related to the Matter or Entity record you have open. The TreeView display is laid out in Windows Explorer-like format and the first level of the tree is organized by module.



When you open a module on the TreeView tab, a listing will appear beneath it. This listing contains only those records from the selected module that have been linked to the Matter or Entity record you are in.

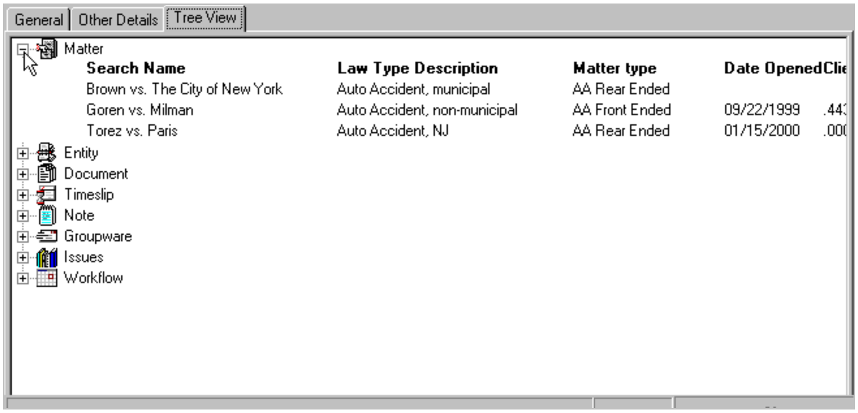
To Open a Module Listing in TreeView

To view records listed under a certain module:

- Click the ⊞ to the left of the module name, or
- Double-click on a module heading

The ⊞ will change to a ⊟ and a listing of records that belong to that module and that have been linked somehow to the Matter or Entity Record you are in will be displayed. Unrelated records belonging to this module will not appear here on the TreeView tab.

The illustration below is of an Entity TreeView Tab. The listing of related Matters has just been displayed, showing the three Matters to which this entity has been assigned.



To close a listing, simply click the corresponding ⊟ or double-click on the module heading.

To Show History View

The TreeView tab also contains another very convenient way to view related records. **History View** is a chronological list of all tasks, appointments, phone calls, critical dates, court events and documents related to the entity or Matter record. Related Matters are also included in the list (inserted according to their open date). This feature allows you see, in one glance, the entire chronological history of a Matter, or your office's interaction with an entity.

To display History View, simply place a check mark in the **History View** checkbox on the upper right. You will see the TreeView display change to history view.

To open and view details on an entry, simply double-click on it.

To de-activate history view, simply click the **History View** checkbox again to remove the checkmark. To change the display of the History View, see Customizing the TreeView Layout.

Creating Relationships from the TreeView Tab

The TreeView tab not only provides an overview of all records related to the Entity or Matter record you have open, but also allows you to create new links.

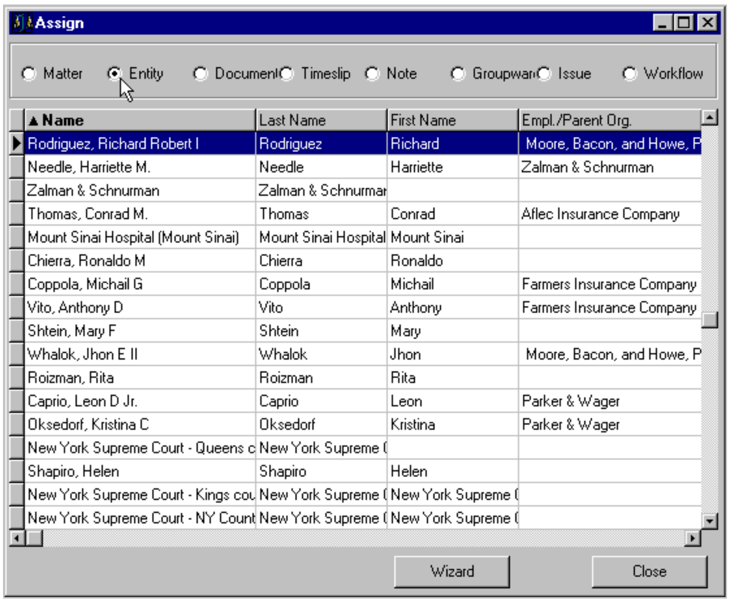
To create a relationship in TreeView

Access the Matter TreeView or Entity TreeView tab for the record in question.

Highlight the Module that contains the record to which you would like to assign a relationship.

Hit the Add button on the TreeView Toolbar at the top of the screen.

An Assign dialog box will appear. The module you highlighted will be selected at the top. However, you are free to select a different module if you wish.



Types and Methods of Assignment

The process of linking records will be somewhat different depending upon the module of the record you wish to relate to the Matter or Entity you have open.

Selecting:

- **Matter** will create a link to another Matter. The assign dialog will appear with a list of Matters displayed. Simply highlight the Matter to be related, hit **Select** and the Matter will be linked to the record you are in.
- **Entity** will create a link to the entity you select. In the assign dialog that appears, highlight the Entity and hit the **Wizard** button. An Assign Entity Wizard will appear for you to complete.
    - If you are assigning the Entity to a Matter, see **Selecting Entities for Assignment**.
    - If you are assigning the Entity to another Entity see **Creating Entity Relationships**.
- Document enables you to select or create a document you wish to relate to the Matter or entity you have open. From the assign dialog you can:
    - Link the record to an existing document by selecting it from the list.
    - Create a New document by hitting the **New** button. See the respective topics for profiling **Incoming** and **Outgoing** documents for detailed instructions. If you are creating the document from within a Matter, it will automatically be linked to that Matter.
- **Timeslip** will allow you to create a timeslip either
    - Automatically linked to the Matter you have open, or
    - For the Entity you have open, who will automatically be designated Timekeeper.

  In the assign dialog select the **New** button. A blank timeslip will appear for you to complete. See **Creating a New Timeslip** for details.
- **Note** will allow you to link the Matter or entity you are in to a note, or to create a new note.

At the assign dialog with the Note radio button highlighted:

- Create a link by highlighting the note in question and hitting **Select**, or
- Create a new note by hitting the **New** button. See **Creating a New Note**. It will automatically be linked to the record (Matter or Entity) you have open.

♦ **Groupware** will allow you to create a new groupware item. Hit the **New** button in the assign dialog. A Groupware Template listing will appear, from which you can make a selection. See Creating a GroupWare Item for details.

♦ **Issue** will allow you to assign an issue to the Entity or Matter. The assign dialog will appear with a list of issues displayed.

- Assign an issue by highlighting the issue and clicking **Select**, or
- Create a new issue by hitting the **Wizard** button. An Available Issues dialog will appear. See **Selecting and Creating Issues** for detailed instructions.

♦ **Workflow** will allow you to create a new workflow item for the Matter or entity. In the assign dialog hit the **New** button. A workflow menu will appear. Select the type of workflow item you wish to create. See Creating a New Workflow Activity for detailed instructions.

To modify an entry on the TreeView tab

When you open the TreeView tab within a Matter or Entity Record, all records linked to that Matter or Entity are displayed. You can modify these links directly from the TreeView screen itself.

To Modify an Entry:

1. Access the Matter TreeView or Entity TreeView tab for the record in question.
2. Open the Module listing that contains the Linked Record.
3. Locate the record in question. If the listing you selected is very long, you can filter or change the layout to assist you in your search.
4. To open the record for editing:

   - Highlight the record and hit the 

 button on the TreeView Toolbar at the top of the screen, or

- Double-click on the record.

5 The record will open. Make any changes you wish. Save and close

To remove a link

When you open the TreeView tab within a Matter or Entity Record, all records linked to that Matter or Entity are displayed. You can remove these links directly from the TreeView screen itself. Deleting an item from the TreeView screen severs the link between the Matter or Entity record and that entry, but does not remove the entry record from the database.

To delete a link between records:

1 Access the Matter TreeView or Entity TreeView tab for the record in question.

2 Open the Module listing that contains the Linked Record.

3 Locate the record in question. If the listing you selected is very long, you can filter or change the layout to assist you in your search.

4 Highlight the record and hit the Delete button on the TreeView Toolbar at the top of the screen.

5 Respond to the confirmation prompt that appears:

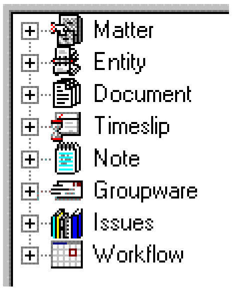
Click **Yes** to proceed or **No** to cancel the deletion.

Depending upon what type of link you are attempting to delete. A second prompt may appear:

This indicates that you are not able to sever this relationship from the TreeView tab, but must instead delete it from the appropriate listing tab for the specified module within the Matter or Entity record.

Filtering TreeView Listings

Both the Matter TreeView tab and the Entity TreeView tab feature listings of related records organized by module. The first "branch" of TreeView is a list all Practice Manager modules:



Open a module and a listing of records will appear. These are records belonging to this module that are related somehow to the Entity or Matter record you are in. (For details see **Viewing Relationships in TreeView**.) Some of these listings can be quite long and you may wish to apply a filter. When you apply a filter to a listing on the TreeView tab, it affects only this specific listing here on the TreeView tab of the specific Matter or entity record you have open.

To apply a filter to a TreeView listing

1 Highlight the module heading of the listing you wish to filter.

2 Hit the Filter  button on the TreeView Toolbar at the top of the screen. A Filter dialog appears.

3 Select desired filter criteria. Available options will depend upon which module you selected. The process of filtering on the TreeView tab is the same as filtering elsewhere in the program. See **Creating Filters to Select Records** for details on this process. Note that when you are setting filters on the TreeView tab, all of the same filtering features (saving, retrieving etc.) that exist in other areas of the program are available to you here as well.

4 Hit the **Apply** button on the filter dialog and you will see the filter take effect on the TreeView tab. The filter you apply will affect only the specific listing on the TreeView Tab of the specific Matter or Entity record you are in at the time.

NOTE: Filters do not remain in effect when you exit the record.

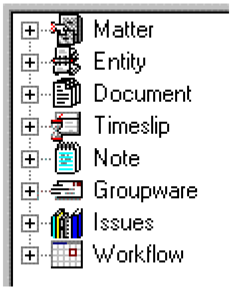
To clear a filter from a TreeView listing

Hit the Clear Filter 

Button on the TreeView Toolbar.

Customizing the TreeView Layout

Both the Matter TreeView tab and the Entity TreeView tab feature listings of related records organized by module. The first "branch" of TreeView is a list of all Practice Manager modules:

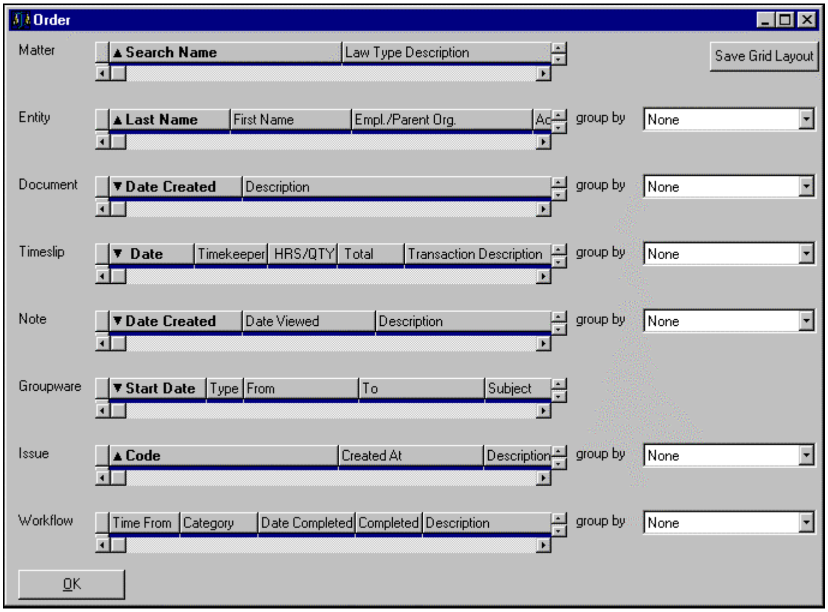


Open a module and a listing of records will appear. These are records belonging to this module that are related somehow to the Entity or Matter record you are in. (For details see **Viewing Relationships in TreeView**.) Just as you can customize the listing layout of listings elsewhere in Practice Manager, you are able to customize the layout of these listings as well.

Changes you make to the listing layout here will affect only the specific listing on the TreeView Tab of the specific Matter or Entity record you are in at the time. You can choose to save the new settings or not.

To modify the TreeView listing layout

Hit the View Options  button on the TreeView Toolbar at the top of the screen. The dialog will display with the Sorting and Grouping tab active:



The Order dialog contains a **Column Heading Bar** for each module listing that appears on the TreeView tab. You will use these to modify the listing layout for the desired module. Customization is implemented here just as it is for listings elsewhere in Practice Manager. For detailed instructions see **Customizing the Listing Layout**.

Customize any listing you wish.

To save the layout, hit the **Save Grid Layout** button on the upper right. Otherwise, the layout changes will be lost when you exit the Matter or Entity record.

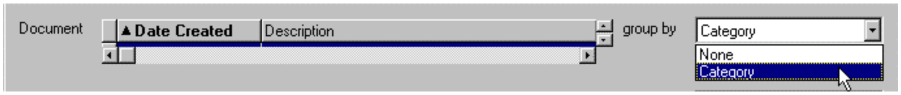
Click **OK** to implement your changes or **Cancel** to close without saving.

To modify the sort order of a TreeView listing

Just as you can use the **Column Heading Bars** in the Order dialog to change the layout, you can also use them to set sort order just as you would in Practice Manager's global listings. For detailed instructions see **Sorting Listings**.

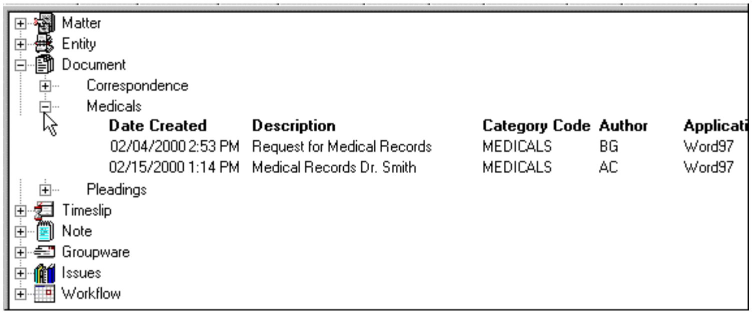
To modify grouping in the TreeView listing

An additional option is the **Group By** dropdown to the right of most module headings.



This drop down allows you to change the structure of your TreeView. Let's say for example, that as in the illustration above, we elect to group Documents by Category, with our sort order set to Date Created (as indicated by the ▲ in that column heading).

With this setting, the TreeView tab will display like this:



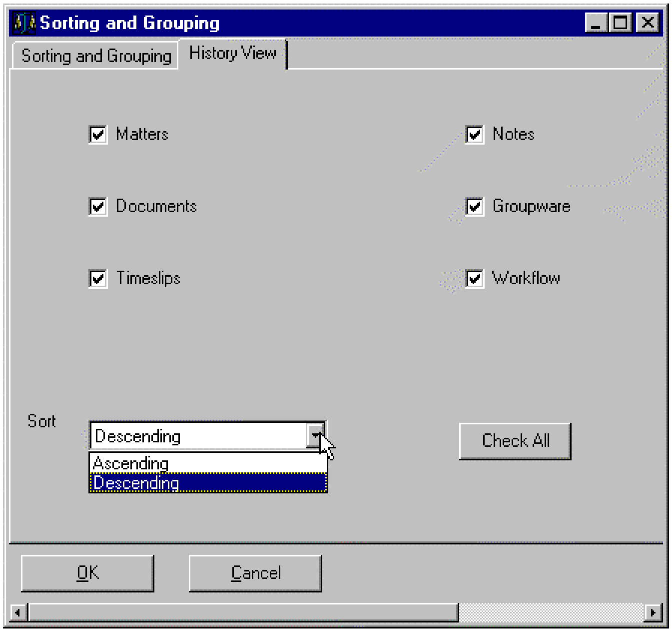
We have added a "branch" to our tree beneath Documents, which is Category. Within each Category, Documents relating to the Matter appear – sorted in ascending order by Date Created.

To modify the History View

You will note that the Order dialog also features a **History View** tab. History View is a chronological list of all tasks, appointments, phone calls, critical dates, court events and documents related to the entity or Matter record. Related Matters are also included in the list (inserted according to their open date). This feature allows you see, in one glance, the entire chronological history of a Matter, or your office's interaction with an entity.

If you do not wish to include all types of records in your history view, you can specify which ones you would like to include.

1. Hit the View Options  button on the TreeView toolbar at the top of the screen. The Sorting and Grouping dialog will open.
2. Click on the **History View** tab.



3 Click to place a checkmark next to the modules you wish to include in your History View listing.

- Unchecked modules will not appear at all in History View. If none of the modules are checked, then your history view will be blank.
- Click the **Check All** button to include all records.
- Change the History View sort order by selecting Ascending or Descending from the Sort box.

4 Save changes.

- Click **OK** to save changes and close the dialog.
- Click **Cancel** to exit without saving.

After setting these options, only records belonging to the modules you specified will display the next time you activate History View. Fordetails on activating History View and utilizing the options here in the dialog, see **Viewing Relationships in TreeView.**

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Chapter

5

Creating Records in Practice Manager

Creating Records

Practice Manager is organized in a series of modules. Each module has its own Listing which displays all its records in a grid format. You can add a new record to a module from that module's listing or from anywhere in the program. Below are four ways to create a new record:

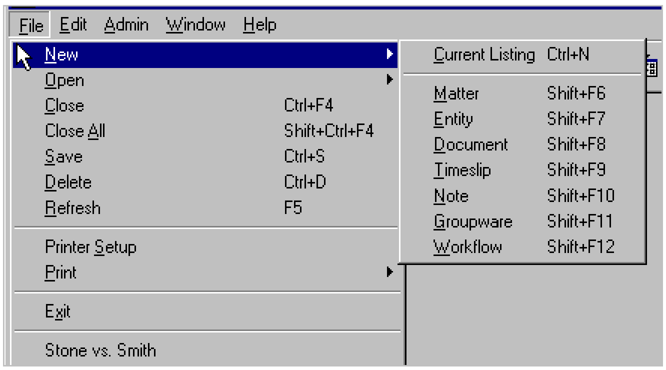
To create a record using the menu

Records for any module can be created from the Practice Manager Menu Bar. To do this:

1 Display the File Menu:

- From the Practice Manager Menu Bar select **File**
- Strike Alt + F.

The File Menu will appear.



2 Display the new record menu. With the File Menu displayed:

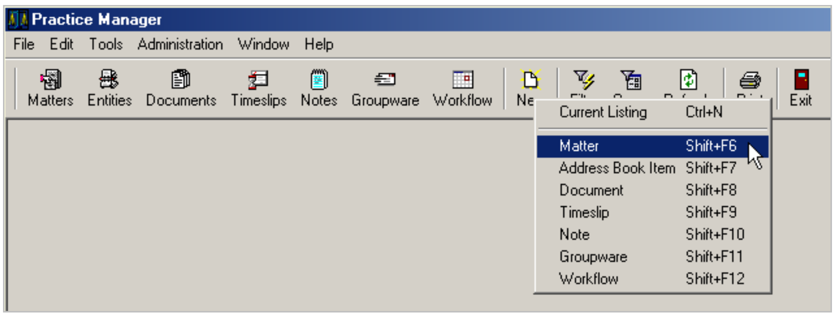
- Hit "N"
- Select **New**.

3 Choose the type of record you want to create from the new record menu.

- Strike the appropriate underlined key on the list, for example, "M" for Matter
- Click on one of the menu selections. (If one of the Listings is displayed, selecting **Current Listing** will start a record of type stored in that Listing.)

To create a record using the toolbar

You can also create a record for any Listing from the Practice Manager Toolbar. To start select the New icon, and then select the type of record you want to create. For instance, to create a new Matter record, click on the New icon and select Matter.



To create a record using function key combination

Practice Manager also gives the ability to create a new record by using a Function Key in combination with the Shift key. The function keys, numbered F1 through F10 or F12, are normally located at the top of your computer keyboard. A list of the Function Key combinations can be seen on the menu displayed when you select **New** from the File Menu. For a list of all Function key combinations, see Function Keys and Control Key Combinations.

To create a record using the speedbar button

Every Listing includes a **New** button on the Speedbar. Clicking on the **New** button will open the record entry screen for the type of record stored in the Listing.

Adding a new record to a Listing in one of these ways will display the record entry screen applicable to the type of record being created. For the most part, you will fill out the record entry screens manually. However, if you have activated the option in User Preferences to use a Template for that type of record, you can select a Template to complete some or all of the fields in the record. For information on using Templates, see Using Templates When Creating Records. When all information has been entered into the record entry screen, the record is saved and stored in the Listing.

For creating records in….

- Matters see Steps Involved in Creating a New Matter
- Entities see Creating a New Entity Record
- Documents see Creating Outgoing Documents
- Notes see Creating a New Note
- Workflow Items see Creating a New Workflow Item
- GroupWare Items see Creating a GroupWare Item
- Timeslips see Creating a New Timeslip

Using Templates When Creating Records

When you create a new record in Practice Manager, information is entered into the database by using a record entry screen containing various fields. For the most part, you will enter information into the fields manually. However, Practice Manager also gives you the option of using Templates to automate much of your data entry. Templates are filled out in advance with information you expect to use to create certain records. It can greatly speed the process. If you elect to use Templates when adding a record to a particular Listing, immediately after you initiate the process of creating a record, a list of Templates will appear instead of the usual blank record. When you make a selection from this list, whatever fields are filled in on that template will insert automatically into the new record, speeding your work.

To activate templates

You can activate the use of Templates for the following modules of Practice Manager.

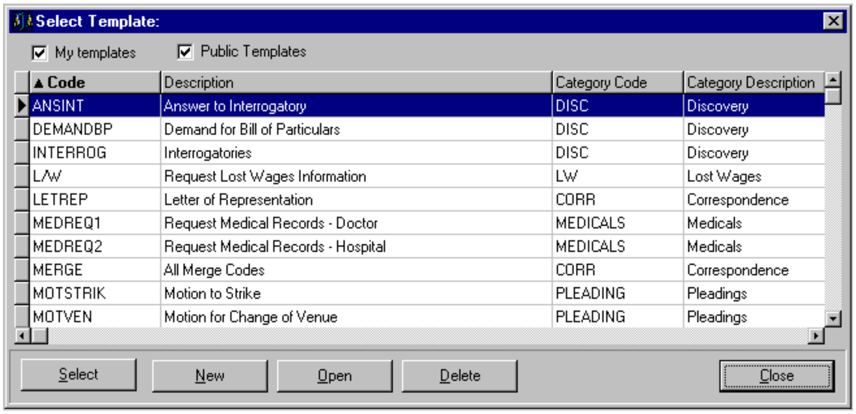
- Matters.
- Entities.
- Documents.
- Notes.
- Timeslips.
- Workflow.
- GroupWare.

Each User can activate Template use separately for each of these modules by making the appropriate selections in Preferences. See Setting Other Preferences.

To select a template

To use a Template to complete a record in whole or in part:

1. Start the process of creating a new record. See Creating Records. If the Template use has been activated, the Template list will appear. Here, for example is a Template list for Document Profiles.



If template use is not active, or you neglected to select one at the outset, you still have the option of retrieving one to complete the record. To do this, select **View** and then select **Retrieve Template** from the Practice Manager menu.

2. Highlight the desired template in the list and click **Select**. The record entry screen for the record you are creating will open with many or all fields completed automatically for you.

3. Complete and save the new record.

To creating a new template

Normally, your System Administrator will be responsible for creating templates and this is done from within various screens under the Admin menu. However, there is an alternate way to create a template. Once you have completed a record, you may save it as a template for later use. To create a template in this fashion:

1. With all fields in the record completed as desired, select **View** and then select **Save As Template** from the Practice Manager menu. A template screen will appear with the information you have entered.

2. At the top of the screen, enter a Code and Description for the template.

Hit the **Save Template** button on the bottom right. The template will now appear in the template selection list for this module.

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Creating Reports

Creating the Listing Report Format

Each of the Listings in Practice Manager can be used as a basis to create powerful, detailed reports on every aspect of your practice. Practice Manager Listing reports are created directly from the Listings. Therefore, to create the report layout, you modify the Listing layout. To create the content of the report, you use QuickFilters, a User-defined Filter or a Query to select the records for the report. After the desired records are displayed, the report can be previewed on the screen, printed or saved in a file.

To create a listing report layout

1. **Choose the fields for the report**. You can specify what fields of information will be displayed in the columns of the report by adding or removing the fields on the Column Heading Bar of the Layout for the Listing in question. See Customizing the Listing Layout.
2. **Arrange the fields in the desired order**. Arrange the fields in exactly the order you wish them to appear in the report.
3. **Specify the relative width of each field**. Adjust the size of the columns so that the information will display fully in the columns.

To save the report layout

There is currently no way to permanently save the Report Layout. However, you can save the changes you have made to the Listing Layout, until it is changed again. See Customizing the Listing Layout for information on this and on executing all the steps above.

Creating Reports

To select and sort records for the report

After creating the format for the Listing Report, you will select the records to be included as well as the order in which they will be sorted.

Select a Sort Field and set the sort order. Select one of fields in the Layout as the Sort Field and set the sort order for the field as either ascending or descending. See Sorting Listings.

Filter the records for the report. Select the records you want to include in the report. You can either use any QuickFilters displayed on the Filter Bar or you can create or retrieve a User-Defined Filter or Query. See Creating Filters to Select Records or Using Queries to Filter Listings.

Apply the Filter. After you have selected the records to be included, you are ready to preview, print or save the report to a file. See Printing Listings.

Printing the Listing Report

You print a Listing report in Practice Manager by printing the sorted and filtered Listing. The Listing can be displayed on the screen, printed to a printer or saved in a text file that can be edited in a text editor, such as Wordpad or Notepad, or your word-processor. For detailed instructions on printing Listings, see Printing Listings.

Working with Matters

Overview of Matters

Most record features of Practice Manager are linked to a Matter, except perhaps some contacts in your Address Book or Global Entity Listing (comprehensive list of all contacts).

Depending on your security access. every matter will contain other tabs that allow you to access related modules. These tabs contain information in Listing format. Each contains a Listing of records relevant to the matter. The Document tab, for example, contains a Document Listing showing only documents related to that matter. The Matter Listings include:

- **Matter Entity Listing (Players Tab).** All Entities—individuals and organizations—that have been assigned or linked to the Matter.
- **Matter Document Listing.** All documents that have been created, received or otherwise recorded in a Document Profile in the Matter.
- **Matter Workflow Listings.** All Workflow Items that have been scheduled in the Matter—Tasks, Appointments and Critical dates.
- **Matter GroupWare Listing.** All messages, including tasks, appointments and notes, which have been scheduled using a GroupWare application—Microsoft Exchange or Microsoft Outlook or Novell GroupWise.
- **Matter Timeslip Listing**. All time and expense slips that have been generated in the Matter.
- **Matter Note Listing**. All Notes that have been created in the Matter. In addition, Matters can also contain other information not included in any global Listing.
- **Issue Listing.** The factual and legal issues applicable to the Matter.

- **Annotations.** Lists of records, similar to index cards, which contain additional information relevant to the Matter. Annotations are created using FormDesigner, an optional tool that enables your firm to create customized Listings.

- **Auxiliary Screens.** Forms created in FormDesigner. Each Matter can contain one Matter Auxiliary, which will appear as an additional tabbed screen in the Matter.

- **TreeView.** This tab does not contain a listing – but contains a graphical or "TreeView" representation of all links throughout the system relevant to the matter. For Details, consult the Chapter entitled Using TreeView for Matters and Entities.

Some of these listings can also be viewed in their entirety – that is, across all matters, not just in reference to one specific matter. These are referred to as the Global Listings. The global Listings in Practice Manager are the Address Book Listing, the Document Listing, the Workflow Listing, the GroupWare Listing, the Timeslip Listing and the Notes Listing. Each Global Listing contains records that relate to all of the Matters handled by your office. These records remain linked to their individual matters and can be sorted or searched by matter as well. The Global Listing just gives you an alternate way to view, filter and sort these records.

Working with the Matter Listing

All Matters, whether open or closed, can be displayed in the Matter Listing. To find a Matter in the Matter Listing, you will use the QuickSearch Window—the feature used to locate records in all Listings in Practice Manager. In addition, you will be able to narrow down the list of items on the Matter Listing using several types of "filters"—QuickFilters, User-defined Filters and Queries. Filters and Queries will also give you the ability to selectively list Matters that meet certain criteria—such as Matters you are handling; Matters with a particular status; all auto cases. By changing the way the fields in the selected Matter records are displayed in the Matter Listing, you will have the ability to create, view and print many different types of useful reports for your office.

From the Matter Listing you can:

- **Create** a New Matter.

- **Change** the Layout of the Matter Listing.

- **Search** for a Particular Matter. Using the QuickSearch Window, you can search for the Matter you wish to open by its Search Name or Matter Number.

- **Filter** the Matter Listing. You can use QuickFilters to limit the Entities displayed to all Open or Closed Matters or just the Matters you are handling. You can create and save User-defined Filters or Queries that can display Matters according to any criteria you specify.

- **Print** the Matter Listing. Print the filtered and sorted list.

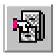
To display the Matter Listing

The Matter Listing displays a list of all Matters that have been created in Practice Manager. There are three ways to display the Matter Listing:

- From the Practice Manager Menu

  1. Click on **File** in the Practice Manager Menu.
  2. Select **Open** and then select **Matters**.

- From the Practice Manager Toolbar

  Click on the Matter Listing icon  in the Practice Manager Toolbar.

- Using a Shortcut Key: Strike Shift + F6.

To open an existing Matter

To open an existing Matter:

1. Display the matter listing.
2. Locate the Matter in the Matter Listing and highlight it. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Matters displayed. See Filter the Matter Listing or use the QuickSearch Window to find the Matter. See Searching the Matter Listing.
3. To open the Matter:
   - Double-click the highlighted Matter
   - Strike “Ctrl + O”
   - Click on **Open** in the Speedbar
   - Select **File** and then **Open** and then select **Selected** Item on the Practice Manager Menu.

4 The Matter will open to the Matter Information Screen or any screen you specified in Preferences to be the Active Screen when a Matter is opened.

To change the Matter Listing layout

The number, order and size of the columns in the Matter Listing can be changed to show the information you consider most important to be in view. There are many fields to choose from and the columns can even display fields included in a Matter Auxiliary, provided the appropriate preference is enabled in the Administrative Settings. If Matter Auxilliary fields are not available for you to select, contact your System Administrator.

What Columns Should Be Displayed

Although any of the columns can be displayed, you will find certain fields more useful than others:

- **Search Name.** The name your firm will use to help locate the Matter in the Listing using the QuickSearch window.
- **Matter Number**. If your firm uses a combination of the Client Number and Matter Number to track Matters, then this field will display both, separated by a period (.).Otherwise, only the Matter Number will display. If your firm personnel are accustomed to tracking Matters by Matter Number, they can use the Matter Number to locate a Matter in the Listing.
- **Status.** Status can be used to track the different phases of a Matter, or simply indicate whether it is open or closed.
- **Law Type.** Law Type indicates area of practice for the Matter.

Adding, Removing, Ordering and Resizing Columns

You can add, remove, order and resize columns on the Matter Listing, just like other Listings. To make these changes to the columns listed on the Column Heading Bar, you will access the Column Control Menu or drag the columns to the proper location and size. For detailed information on how to change the Layout of Listings, see Listing Components and Controls and Customizing the Listing Layout.

To sort the Matter Listing

Matters can be sorted by any field displayed in the columns of the Matter Listing. You can choose to sort Matters in ascending or descending order, alphabetically or numerically, depending upon the field. Normally, you will sort Matters by **Search Name** or **Matter/Client#**, but you can also sort by other fields, such as **Status** or **Date Opened**. You select the Sort Field and change the sort order of the Matter Listing, just like other Listings. See Sorting Listings.

1. If the Sort Field does not appear as a column heading on the Column Heading Bar, add the desired column to the Matter Listing layout. See Changing the Matter Listing Layout.

2. Double-click on the column of the field in the Column Heading Bar to choose the field and sort it in ascending order, indicated by the ▲ symbol. To switch to descending order, double-click again. The sort indicator will change to ▼.

   An alternate way to change the sort order*:* Point to the column to be used for sorting, right-click to display the Column Control Menu and select **Ascending** or **Descending** from the menu.

   The new sort order will remain in effect until you close the Matter Listing.

3. To **Save** the selected options, right mouse click on the Column Heading Bar and select **Save Grid Layout** from the menu.

To searching the Matter Listing using the QuickSearch window

To open an existing Matter, you must locate it on the Matter Listing. The fastest way to locate a Matter is to use the QuickSearch Window, available in all Listings. To search for a Matter, you must set the field to be used for the search as the Sort Field. If you want to locate a Matter by its name, use the Search Name as the Sort Field. If you prefer to locate Matters by number, use the Matter No. field. For more detailed information on searching Listings in general, see Searching for Records in Listings.

1. Limit the number of Matters displayed, if you want, using the QuickFilters, a User-defined Filter or a Query. See Filter the Matter Listing.

2. Choose the Sort Field for the search. See Sorting the Matter Listing.

3. Type the first few characters applicable to the Search Field—either numbers or letters.

As you type, the QuickSearch Window will open, displaying the characters you have entered. The Matters beginning with characters you have entered will be displayed in the Matter Listing.

4 To search for Matters **containing** particular characters, place the wildcard character "*" (an asterisk) before and after the search string.

5 To clear the QuickSearch window for a new search,

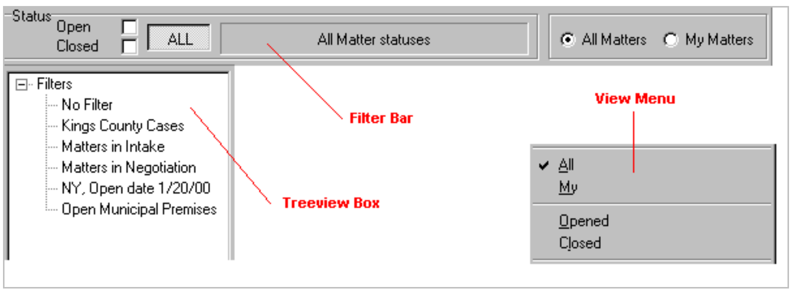
- Delete the characters in the QuickSearch Window
- Hit the **Esc** key on your keyboard
- Double-click on another column heading in the Matter Listing.

To filter the Matter Listing

You can limit the number of Matters displayed in the Matter Listing using QuickFilters, a Filter or a Query. In User Preferences, you can set an option that automatically activates a specific Filter or Query each time you open a Matter Listing, or utilize another option that presents the list of available Filters and Queries. See Setting Filter Options for Listings.

QuickFilters

The QuickFilters are located on the Filter Bar and View Menu. For detailed information on QuickFilters, see Using QuickFilters and Listing Components and Controls.



The QuickFilters for the Matter Listing include:

- **All Matters:** Displays all Matters.
- **My Matters:** Displays all Matters into which the User is assigned.
- **Open:** Displays all open Matters.
- **Closed:** Displays all closed Matters.

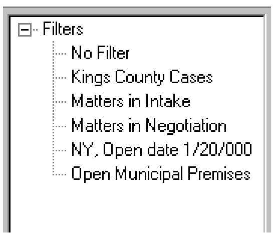
User-defined Filters and Queries

You can create, save and retrieve Filters and Queries, based upon one or a combination of several fields contained in the Matter Information screen or any Matter Auxiliary Screen assigned to a Matter. See Using a Matter Auxiliary. For detailed information on using Filters and Queries, see Creating Filters to Select Records and Using Queries to Filter Listings. Filters and Queries can be saved and used to select records for Matter Reports. Using Filters or Queries, you can select Matters by

- **Law Type, Practice Area or Department.** Filter for Matters in a particular practice area or handled by a specific department or group in your office by choosing a single Law Type or combining Law Types.
- **Venues.** Filter for Matters in a specific venue or several venues—for example, Hartford Superior Court, all county courts, Texas federal courts. Select "**My Matters**" to display all Matters you are handling in that venue.
- **Particular Client, Attorney, Staff Member or Other Person.** Filter for Matters assigned to a particular Client, Attorney, Staff Member or other person by selecting that person's name from the Entities list.

  Note: You can also display a list of Matters associated with a particular Entity from the Address Book or Matter Entity Listing. Simply right-mouse click on the Entity record and select **Related Matters** from the menu.

In addition to other Filter options discussed above, the Matter Listing includes a convenient Filter retrieval feature in the TreeView panel on the left side of the Listing Screen.



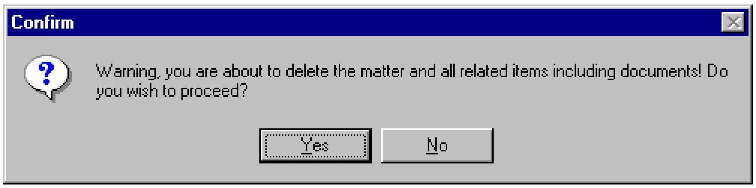
Displayed in Windows Explorer-like format, the TreeView Filter allows you to view saved filters at a glance and make a selection from the list. For details, see Applying Filters from the Listing TreeView panel.

To delete a Matter:

You can delete an existing Matter from the Matter Listing.

1. Display the matter listing. See Displaying the Matter Listing.
2. Locate the Matter in the Matter Listing and highlight it. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Matters displayed. See Filter the Matter Listing. Or use the QuickSearch Window to find the Matter. See Searching the Matter Listing.
3. To delete the Matter,
   - Select **File** and then select **Delete**
   - Hit Ctrl + D.

   A dialog asking for confirmation of the deletion will appear:



   - Select **Yes** to confirm the deletion.
   - Select **No** to cancel the deletion.

   Note: *Unless you have a sufficiently high security level, you will probably not be able to delete a Matter. If you have this right, however, exercise it with great care.* ***Deleting a Matter also deletes all related Workflow and GroupWare Items, Timeslips, Notes and Documents!***

To print matter lists and reports

The Matter Listing can be used to create important and useful Reports regarding Matters being handled by your office. Matter Listing Reports can provide you with information about Matters with a particular status—open, closed, in trial; Matters assigned to one or more Law Types; or Matters being handled by one or more attorneys. Basically, you will format the listing to include everything you wish the report to include. In other words, the columns you select for the Matter Listing layout are used for the columns of the report; the Sort Field is used to order the records in the layout; and Filters--QuickFilters, User-defined Filters or Queries--are used to select the records for the report. The resulting record display can be viewed, printed or saved in a file.

To create a Matter List or Report:

1 **Select Records.** Use a QuickFilter, User-defined Filter or Query to select the Matter records that will comprise the report or schedule. See Filter the Matter Listing.

2 **Create a Layout.** Modify the columns in the Matter Listing layout to display the fields you wish to include in the report. See Changing the Matter Listing Layout.

3 **Sort the Records.** Choose the field to be used to sort the records and sort them in ascending or descending order. See Sorting the Matter Listing.

4 **Print the Report.** You will be able to name the report and print it to the screen, the printer or a file.

For detailed information on printing Listings, see Printing Listings. Listings printed to a file can be edited in your word-processor.

Some Examples of Matter Listing Reports

Report Description	How to create
Your Open Matters	Apply a Filter that displays **My Matters** with a Status of **Open**.
All Matters Opened During a Particular Year or Quarter	Apply a Filter where the Open date is within the last 365 days or some other period of time.
All Matters within a Specific Venue	Simply Filter under venue. Add date parameters or status as well, if you wish.

Creating Matters

Unless your firm is quite small, it is likely that it will designate only specific individuals to create new Matters. If you are unable to create a Matter, contact your System Administrator.

To create a new matter

To create a matter from th

1 There are four ways to create a new matter:

- From the Practice Manager Menu Bar, select **File** and then **New** and then select **Matter**.
- Display the Matter Listing, hit the **New** button on the Speedbar.
- Click on the New icon  on the Practice Manager Toolbar and select Matter from the drop down list..
- Strike Shift + F6.

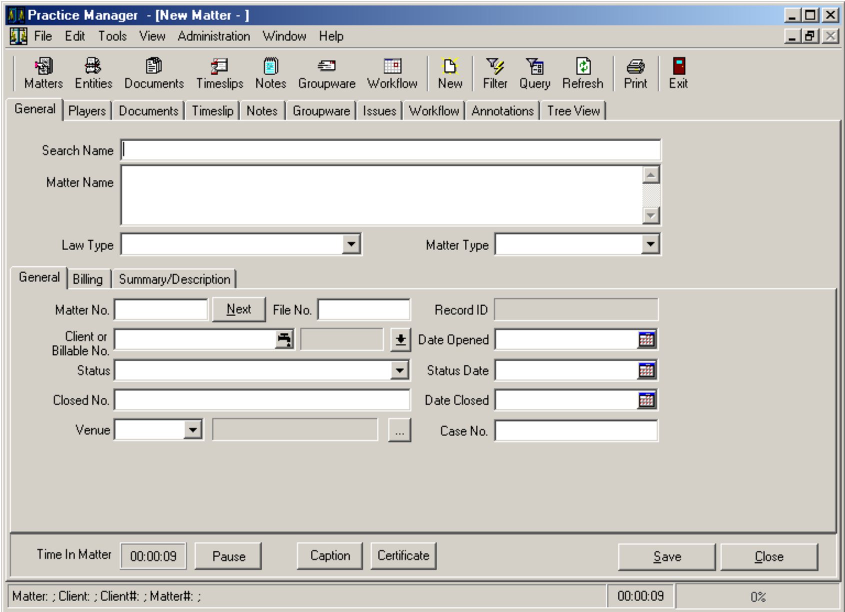
2 If you have selected **Use Matter Template** in Preferences, you will be given the option to select a Matter Template to fill in parts of the Matter General Information Screen.

3 When the new matter opens, fill out all applicable fields on the New Matter Screen. Note: A Search Name and Law Type are required at a minimum.

4 If a Matter Auxiliary is assigned to the Law Type selected for the Matter, you will have an opportunity to complete it.

5 Assign Entities to the Matter, including your Clients, firm attorneys and Personnel, opposing counsel, and other parties involved in the Matter.

Matter Fields - General Tab



- **Search Name.** The name of the Matter displayed in the Matter Listing and used in Matter searches. This field is limited to 50 alphanumeric characters. This field is REQUIRED.

- **Matter Name.** This field can be used to include a more complete or formal name for the Matter. Called the “Long Matter Name” on the Component Design screen, it is often used as “Re” or Subject line in document assembly. This field can include up to 255 alphanumeric characters, including carriage returns.

- **Law Type.** The practice area that best fits this Matter. Select the Law Type from the list established by your firm from the Law Type list field. All other aspects of a Matter are customized based upon the selected Law Type. For instance, the Law Type determines the Roles of Entities that can be assigned to the Matter, the Category and Type of every document associated with the Matter, what Workflow items can be selected in the Matter and what Note templates are assigned to the Matter. This field is REQUIRED.

- **Matter Type.** Type of case. Select the appropriate Matter Type from the dropdown.

- **Matter No.** The unique identifier assigned to this Matter. (NOTE: This number can be system-generated but this option must be enabled administratively. If your Matter Numbers are system generated, you can select the **Next** button, and assign the next Matter number in sequence.)

- **File No.** This is the number assigned to the Matter by your office. This number can be either system generated (should your firm choose to use it that way) or, it can be simply used as "free text" and can be alphanumeric.

- **Record ID.** This is a system generated record number that is used as an internal key within the Practice Manager application.

- **Client or Billable No.** Select the name for billable party. An Entity designated as "Billable" is financially responsible for the Matter, even if the Entity is not a Client. You can type characters in the search window to the left of the Lookup Filter Control . This will automatically display a list of billable entities beginning with the characters you have typed. Clicking on the Lookup Listing control  will display a Listing of Billable Entities for you to choose from. An Entity's designation as a Client or Billable Entity is established by clicking the **Billable** checkbox within the Entity's Entity record; the Client or Billable Number is the ID for the Entity, recorded in the Entity record. Exactly which entities will appear in this listing is determined by the choices your firm has made within System Settings. Contact your System Administrator is you have questions regarding which of these entities appear. The field name and Entities displayed in the selection list will vary as follows:

  - **Client#** — all Entities who are Clients.
  - **Billable#** — all Entities who are designated as "Billable".
  - **Client or Billable#** — all Entities who are either Clients or designated as "Billable".
  - **Client and Billable#** — all Entities who are both Clients and designated as "Billable".

- **Status.** Current Status of the Case.

- **Status Date.** Date that Status was last updated.

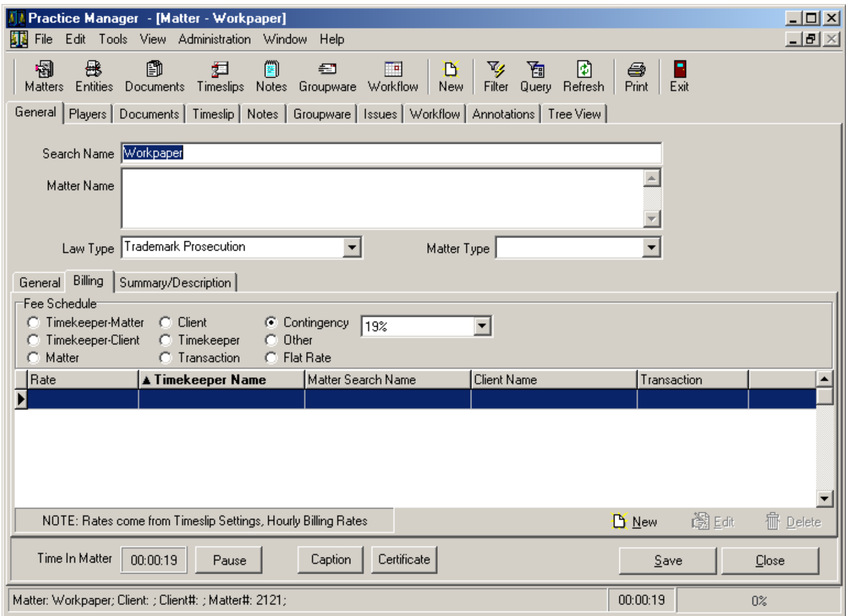
- **Closed No.** You will enter the closed file number here (in the event that your office assigns closed file numbers).

- **Date Closed.** Date the case was closed.
- **Date Opened.** Date the case was opened.

Certain fields on the Matter information screen are only used in Matters involving litigation or other forms of adjudication:

- **Venue.** The name of the tribunal where the litigation is pending. Select the Venue from the drop-down list. If your pleadings require a Bar Number, you must choose a Venue, because Bar Numbers are assigned by venue.
- **Case No.** The assigned number of this case.

Working with the Matter – Billing Information



This tab contains basic rate and billing information.

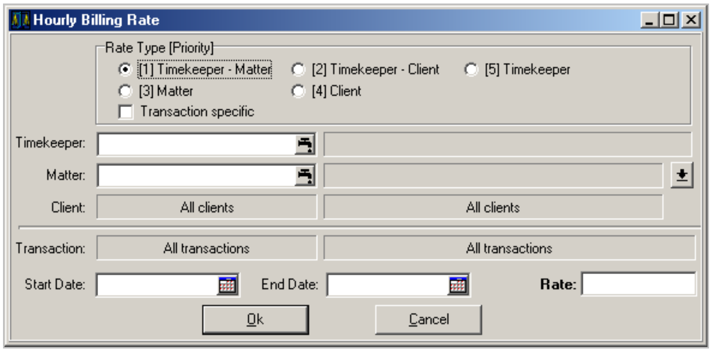
- **Fee Schedule**. Click the appropriate radio button regarding how your office will bill for time in this matter:
  - **Timekeeper-Matter.** Rate specific to an individual Timekeeper in this specific matter.

- **Timekeeper-Client.** Rate based on an individual Timekeeper specific to this client.
- **Matter.** Rate specific to this matter.
- **Client.** Rate specific to this client.
- **Timekeeper.** Rate specific to this Timekeeper regardless of matter.
- **Transaction Timekeeper.** Fee figured on a transaction basis and as well as Timekeeper.
- **Transaction.** Fee figured on a transaction basis. For example, a Pleading has a set fee regardless of time.
- **Contingency.** Fee based upon successful outcome of case. Enter percentage in blank field to the right of this selection.
- **Flat Rate.** Across the board flat fee for the matter. When you select this option, a corresponding blank field will appear. Use it to enter the fee amount
- **Other.** For alternate billing methods not included on this list.

♦ **Rates Table.** Contains a listing of all staff timekeepers and their hourly rates. Timekeepers will appear here automatically. You can add rate information in a staff member's Entity Record or here at this screen as well. Your System Administrator can also set up a list of Timekeeper Rates under the Admin menu in Timeslip Settings. This shows rates specific to selections above.

To add a rate entry to the Billing tab

To add a Rate Entry, hit the **New** button on the bottom right of the tab. Users must have the appropriate security rights to "Administer Timeslip Settings". Contact your System Administrator if this dialog box does not appear. A Billing Rate Data Entry Dialog will appear:



- **RateType.** Select the Rate Type (see above for information on choices)
- **Timekeeper.** Type in the timekeeper's Code or ID# in the lookup filter control field and he or she will appear as a choice for you to select.
- **Matter.** Specify matter, if appropriate (depends on rate type. See above).
- **Client.** Specify client, if appropriate (depends on rate type. See above).
- **Rate.** Manually type in the corresponding hourly billing rate.
- **Start Date/End Date.** Enter the dates the rate is to be in effect.

Once you have completed the dialog, click **OK**.

To edit a rate entry

To edit an entry, simply highlight it in the listing and hit the **Edit** button. The dialog will open again and you can make changes.

To delete a rate entry

To delete an entry, highlight it on the listing and hit the **Delete** button.

Working with the Matter – Summary/Description Information

Type in a description and summary of the case or use this tab to enter any additional notes you wish. This is the Default Matter Note. Information displayed here is also displayed in the Notes tab.

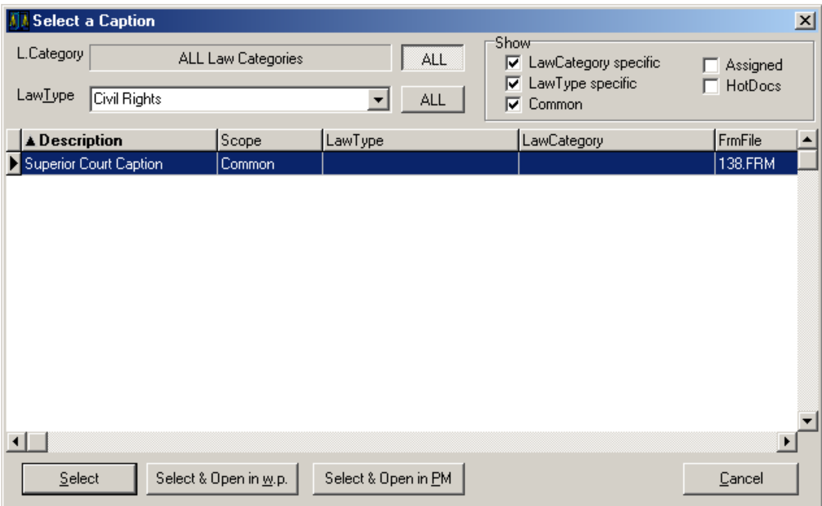
Creating or Selecting a Caption or Certificate of Service

For each Matter, you can create a caption and certificate of service. Then, using the document assembly features of Practice Manager™, you can automatically merge a caption and certification of service into any pleading created.

To select a certification or caption

1 Open the Matter with the Matter Information screen displayed. See Open an Existing Matter.

2 Click on the **Caption** or **Certification** button. A dialog will appear, displaying a list of Captions or Certifications that may be selected for use in the Matter. These are Document Components that have been created by your Practice Manager Administrator or other person familiar with the process of creating Document Components used for document assembly. If you do not see the option you need, contact your System Administrator.



3 Highlight the Caption or COS that you want to assign to the Matter.

4 To make a copy of the item selected without modification, click on **Select.** After making your selection, you will be returned to the Matter Information Screen. Practice Manager will make a copy of an existing Caption Document Component or Certification Document Component, as the case may be, and assign it to the Matter. Once the Caption or Certification is copied to the Matter, it will be automatically assigned a name. The name will consist of the Matter ID for the Matter followed by the name of the Document Component. For instance, in the case of the

State Court Caption in the above listing, if the Matter ID for the Matter was “152”, the name of the Caption assigned to the Matter would be “MatterID 152: State Court Caption”.

5 If you want to make changes in the Component itself, click on **Select & Design** instead of **Select.** This will bring you directly into the merge document itself. Make any modifications to the text you want, close and save the document and return to Practice Manager.

6 If you want to add merge fields to the Component, instead of **Select** or **Select & Design,** click on **Select & Edit**. This will bring you to the Component Design Screen, where you can add additional fields to the Component. Once you have selected the additional fields, click **Design** to open the Component for editing.

After you have completed the process of selecting a Caption or Certification, you will be returned to the Matter Information screen.

To select a different certification or caption

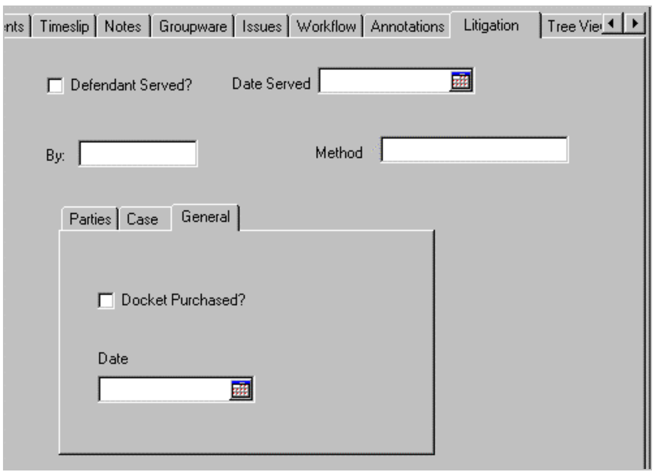
If you have already selected a Caption or Certification and want to change your selection, you will repeat the process outlined in the previous section, keeping in mind the following:

- When you click on **Caption** or **Certification**, the list of captions or certifications will include only those captions or certifications that have been assigned to the current Matter or to other Matters.
- The currently selected caption or certification will be indicated by a pointer .
- To choose a new caption or certification from the list of assigned components, highlight the item in the list and click **Select**.
- If you want to create a new caption or certification from the original Document Components, uncheck the **Assigned** checkbox. This will display the original Caption Document Components or Certification Document Components.
- If you want to make changes to the merge document, whether you are selecting from assigned items or original Document Components, click **Select & Open in w.p.** which will open your Word Processing application. If you want to add merge fields to the selected caption or certification **Select & Open in Practice Manager Select. Select & Open in Practice Manager Select** requires access by a user having Document Assembly Administrative rights.

Using a Matter Auxiliary

Using FormDesigner™, your Practice Manager Administrator can create a Matter Auxiliary, containing additional data-entry fields that will appear as an additional tabbed screen in a particular Matter. Since Matter Auxiliaries can be customized by Law Type, the matter auxiliary you see may change depending upon the Matter's Law Type. Matter Auxiliaries are normally used to capture information for specific practice areas that would not otherwise be entered into the Practice Manager database through its standard modules. The data-entry fields in a Matter Auxiliary can be used to enter supplemental information and can also be configured to "lookup" information from the fields in other parts of Practice Manager, such as Entity records. For instance, in a personal injury Matter, you could use a Matter Auxiliary to record the date, time and location of an accident and the date of the statute of limitations. Using lookup fields, you could display the names of the various insurance adjusters by looking up their names in the Entity records assigned to the Matter. The information entered in the fields of a Matter Auxiliary can also be merged into word-processing documents during automated document assembly.

A Matter Auxiliary will have its own tab, appropriately labeled and be located at the right end of the row of tabs in the Matter. A Matter Auxiliary screen can contain several tabs within it as well, allowing you to organize information effectively and create space for as many fields as you need. Illustrated below is a Matter Auxiliary tab for entering Litigation Details.



To enter information in a Matter Auxiliary screen:

1 Open an existing Matter.

2 Click on the tab for the Matter Auxiliary.

3 If the Matter Auxiliary has multiple tabs, click on the tab of the screen where you want to enter information.

4 Enter information in a Matter Auxiliary in exactly the same way you enter information in the fields in any other screen in Practice Manager. The information in the Matter Auxiliary screens will be saved automatically when you close the Matter.

5 To enter or access information in another module of the Matter, click on one of the other tabs.

6 To close the Matter, click the **Close** button on the Speedbar.

Creating Personal Matters

If your firm gives you approval, you may want to create one or more Personal Matters using your name as the **Matter Search Name**. Make sure that you assign yourself as an Entity to all Personal Matters so they will appear when you select the **My Matters** QuickFilter in the Matter Listing. If you place an exclamation point "!" or "@" before the Matter Search Name, Personal Matters will appear near the top of the Matter Listings, giving you quick access to them. When creating a Personal Matter, you may leave the Client # field blank or your firm may assign a "personal number" to each lawyer that may be entered in place of the Client Number. This will permit searching for Matters using a personal number in the same manner you would use a Client or Matter Number. Law Types should be entered for all Personal Matters. When Practice Manager is installed in your office, a law type for Personal Matters will be established.

In your Personal Matters you may store:

- ♦ Entities you contact often but who are not necessarily part of a Matter--service or insurance companies, and vendors.

- ♦ Entities that are personal contacts---schools, doctors, spouse, etc. You will establish an Entity Type and Role for these entities. A personal Entity Type allows you to filter the Entity Listing on this Entity Type so that you see only your personal entities.

- Form documents, such as ‘phrase banks’ and ‘clause banks’. These are not form components to use in document assembly, but they do contain standard phrases, clauses, and wordings that you may want to incorporate into a document you generate for a particular Matter. You may also generate letters, memos, and envelopes from your Personal Matter, provided that the necessary Document Category, Document Type, and Document Component assignments for the selected Law Type have been established in your office.
- Personal notes.

Creating Limited Administration Matters

As with Personal Matters, your firm may decide to create Admini-stration Matters. These Matters can be used to store information relating to the administration of the office—personnel files, continuing legal education, dealings with vendors. In a Firm Administration Matter you may store:

- Entities your office uses that are not involved in Matters--service companies, malpractice insurance carriers, utilities, bar associations, vendors, etc.
- Firm personnel so you can generate internal letters, etc.
- Firm documents, such as letters and memos.

By creating a Firm Administration Matter, you have a practical way of using Practice Manager for daily routines that are not Matter-specific. This will allow Practice Manager to make internal firm administration more efficient and productive.

Creating Form Library Matters

If you have a certain group of documents that you use frequently with little modification, it may make sense to store them together in a Form Library Matter. This is simply a Matter record that you use to maintain a library of document forms. Documents included in a Form Library Matter can be located quickly on its Matter Document Listing. Once located they can be copied and used in another Matter. Form Library Matters are used when it is more convenient to copy documents than to create Document Components to automate the creation of the documents. If your office decides to use Form Library Matters, the following guidelines will be helpful:

- **Naming the Library**. Use a Matter Search Name that will identify the purpose of the Library—for example, Auto Accident or Premises forms. Consider placing an exclamation point "!" or "@" before the Matter Search Name of each Matter so that it will appear at the top of the Matter Listings.
- **Law Type**. Choose a Law Type for the Form Library Matter that is the same as the Law Type used in Matters where the documents will be used.
- **Assign Entities.** Assign all Personnel in your office to the Matter Entity Listing for the Form Library Matter. For detailed instructions on assigning Entities, see Selecting Entities for Assignment and Assigning Entities from Other Matters.
- **Copy Documents from Other Matters.** To create the list of forms, you can copy documents from various sources:
    - To copy documents from other Matters, see Copying Documents Created in Practice Manager.
    - To copy documents located on your computer or on your computer network, but never profiled in Practice Manager, see Copying Document Created Outside Practice Manager.
    - To convert a scanned document to a form using Optical Character Recognition software, see Converting a Scanned Image to a Text Document.

Profiling the Forms. A document will become part of the Form Library Matter by selecting the Form Library as the relevant Matter in the Document Profile for the document. When completing the Profile, use a Description of the document that will assist users in identifying it in the Form Document Listing without having to open it for viewing. Choosing an appropriate Document Category and Document Type for each document will make it easier to create Filters or Queries to locate documents in the Library.

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Understanding Address Book

Understanding Entities

Your Address Book is a comprehensive listing of all **Entities** with whom your office has dealings.

Individuals and Organizations That Play a Role in Matters

Entity is the term used in Practice Manager to refer to individuals and organizations. Entities include office personnel, users of Practice Manager, clients, attorneys, courts and any other individuals or organizations that play a role in your Matters. Information about an Entity is stored in an Entity record. Together, all of the Entity records comprise the Address Book (also referred to as the Global Entity Listing), a centralized listing of all Entity records, regardless of their matter assignments.

Entity Information

Practice Manager stores all of the information that is needed to communicate with an Entity. This includes

- **Addresses**: as many addresses as necessary, including a description of the address for easy identification.
- **Communication Information**: several telephone numbers for each address; pager and mobile telephone numbers and e-mail and Web page addresses.
- **Notes**: a list of notes relative to the Entity.

- **Auxiliary Information:** Selection of some entity types, like Judge and Expert, generate special auxiliary tabs for information specific to that type. There are also auxiliaries specific to an entity and a matter. Also, if you have FormDesigner™, you can generate your own custom Auxiliary screens specific to other Entity Types.

Assignment of Entities to Matters

When you open a Matter, you can "assign" or link Entities from the Address Book to the Matter. Once assigned, the entity records will be displayed not only in the Global Entity Listing (Address Book) as before, but also in that matter's entity listing. The **Matter Entity Listing** is accessed from within each Matter by clicking on the **Players** tab and will include all Entities that play any role in the Matter

Special Entity Classes

Certain classes of Entities play a specialized role that directly affects the operation of certain features of Practice Manager. These classes include:

- **Staff**: Employees of your organization, including attorneys, secretaries and paralegals. Staff enter their initials, billing rate and Bar Number, if applicable, on the **Other Details** tab of their Entity record (You will activate the **Staff** and **User** checkboxes here as applicable). An Entity must be designated as "Staff" to be available for selection as the author of a document. The Entity records of all Entities designated as Staff can be displayed in the Entity Listing by choosing the "Personnel" filter on the View Menu. If the "Staff" and "User" checkboxes are disabled, contact your System Administrator – You may not have rights to access these settings.

- **User**: Entities who use Practice Manager. The ID of a User is used for logging into Practice Manager. If your firm is integrating with a GroupWare product, such as Outlook, the User's e-mail address must be entered in the Primary Address section of the Entity record.

- **Client**: The party your firm represents. The Entity records of Clients can be displayed in the Entity Listing by choosing "Client" on the View Menu.

- **Billable**: The Entity responsible for paying your firm's bill. A Billable Entity is not necessarily the same Entity that is the Client.

- **On A Mailing List**: Practice Manager allows you to maintain various mailing lists. An entity can be included in one or many of these lists. Checking this box activates the Mailing List tab and allows you to assign the entity to a list.

Entity Type

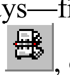
Every Entity must be assigned an **Entity Type** when the Entity record is created. Entity Type is one of Practice Manager's QuickFilters used to bring up certain Entities on the Entity Listing. Entity Type should be distinguished from Entity Role. Entity Role is the role the Entity will play in a specific Matter. An Entity Type is the broadest description that accurately describes an Entity—usually what categorizes an Entity in "real life". Thus, for instance, you might assign an Entity Type of "Medical Service Provider" to a physician in your Address Book and a Role of "Treating Physician" on a Matter's Players Tab.

Entity Role

The **Entity Role** is the role of the Entity in a particular Matter. The Entity Role is selected at the time the Entity is assigned to a Matter. The Entity Role appears only on a Matter's Players Tab; it does not appear in your Global Address Book. If you open an Entity record from within a Matter's Players Tab then fields related to that matter, such as **Role**, will be visible and editable. An Entity can only be assigned one Entity Type, but can have a different Entity Role in each Matter to which it is assigned.

For example, in an insurance defense setting, an entity with the Entity Type of Manufacturer might be assigned into a matter three times with three roles: client, defendant, and insured.

Address Book Functions--Overview

The Address Book (also referred to as the Global Entity Listing) gives you access to Entity information for all individuals and organizations, regardless of their specific role in a Matter. Like other listings, the Entity Listing can be opened in several ways—from the Practice Manager Menu, by clicking on the Address Book icon , or using a Shortcut key (F7). Entities are normally listed in alphabetical order by name—last name for individuals. Like a traditional address book, lettered tabs at the bottom of the Global Entity Listing give you access to

Entities whose names start with a particular letter. To speed up access to Entity records, the number of records displayed in the Entity Listing can be further limited by QuickFilters —individuals, organizations or Entities of a particular Entity Type—User-defined Filters and Queries. You can sort the Entity Listing by any field displayed on the Listing in ascending or descending order, such as Name or Organization. Then, you can use the selected Sort Field to find an Entity by typing in letters in the QuickSearch window until an Entity with matching field information is displayed.

Creating Entity Records

You can create new Entity records from anywhere in Practice Manager using the File menu, the toolbar's **New** icon or a Shortcut keystroke (Shft + F7). Also create an entity from the speedbar of the Address Book or from the Players tab in an open Matter by selecting the **New** button. When you create a new Entity record, you must assign the Entity an Entity Type. In addition to entering the Entity's name, address, telephone numbers and e-mail addresses, if the Entity is a classified as a Client, Billable Entity, Staff or a User, you will also be filling out other information, including:

- **Login Name**: needed by "Users" to log into Practice Manager.
- **Billing rate**: for billing purposes.
- **Bar Number**: for Personnel who are attorneys. Multiple bar numbers may be entered for attorneys licensed in more than one jurisdiction.
- **E-mail address:** for any User sending e-mail messages and other GroupWare Items through Outlook or Exchange.
- **Default Site ID:** the identification for the site at which your data is typically stored. This fields helps to differentiate different storage locations for those organizations having more than one location.

Global Entity Listing and Matter Entity Listing Distinguished

There are two types of Entity Listings: the Global Entity Listing and the Matter Entity Listing. The Global Entity Listing, or **Address Book**, is a list of <u>all</u> Entities stored in Practice Manager. The Matter Entity Listing is a list of Entities that have been assigned to a particular Matter. Clicking on a matter's Players tab accesses this list. Entities appearing in the Matter Entity Listing are not duplicates of Entities in the Global Entity Listing. They appear on the **Players** tab as a result of their assignment to the Matter – it is the same record as the one in the Global Listing, it just appears here as well.

The features and functions of both types of listings are the same with these exceptions:

- A Matter Entity Listing only displays the Entities assigned to a Matter.
- You can only open a Matter Entity Listing from within an open Matter by clicking on the **Players** Tab.
- The Matter Entity Listing displays the Role of an Entity in a particular Matter As well as auxiliary specific data of the entity in the matter.

Functions Available from the Entity Listings

From any Entity Listing, you can:

- Create a New Entity.
- Search for a Particular Entity. You can search for the Entity record you wish to view by its Name, ID (login, client number, or billable number) or any other field contained in an Entity record.
- Filter an Entity Listing. You can use QuickFilters to limit the Entities displayed according to any criteria you choose. For instance, from the Global Entity Listing, you can filter by Entity Type; from Matter Entity Listings, you can filter by Role. You can also create User-defined Filters and complex Queries using criteria from <u>any</u> of the fields in Entity records to view whatever specific group you require.
- Change the Entity Listing Layout. Change the order, size and number of fields displayed as columns in the Entity Listings.
- Preview the Entity Listing. You can preview the listing before it is printed by using the Ctrl key + W.
- Print Entity Listings. Print the sorted and filtered Entity Listings to create important and useful written reports regarding Entities.

Displaying Entity Listings

The Address Book (or Global Entity Listing) displays a list of all Entities. A Matter Entity Listing, located on a Matter's **Players** tab, displays a list of Entities assigned to a Matter.

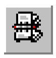
To display the Address Book

There are three ways to access the Address Book:

- From the File Menu

  1. Select **File** from the Practice Manager Menu Bar.
  2. Then click on **Open** and then select **Address Book**.

- From the Toolbar:

  Click on the Address Book icon  in the Practice Manager Toolbar.

- Using a Keystroke:

  Press F7

To display the matter-entity listing

To display a Matter Entity Listing:

1. Open an existing Matter.
2. Select the **Players** tab.

Sorting Entity Listings

Entity records can be sorted by any field displayed in an Entity Listing, in ascending or descending order, alphabetically or numerically, depending upon the field. You will probably choose to sort Entity records by Name in ascending order. You select the Sort Field and change the sort order of the Entity Listing, just like other Listings. See Sorting Listings.

To select the Sort Field and set the Sort Order:

1 If the Sort Field does not appear as a column heading on the Column Heading Bar, add the desired column to the Entity Listing Layout. See Changing the Entity Listing Layout.

2 Double-click on the column of the field in the Column Heading Bar to choose the field and sort it in ascending order, indicated by the ▲ symbol. To change to descending order, double-click again. The sort indicator will change to ▼.

An alternate way to change the sort order*: Point to the column to be used for sorting, display the Column Control Menu and choose "Ascending" or "Descending" from the menu.*

3 The new sort order will remain in effect until you close the Entity Listing. To **Save** the selected sort options, right mouse click on the Column Heading Bar and select **Save Grid Layout** from the menu.

Searching the Entity Listing

To view or edit an Entity record, you first must locate it on the Entity Listing. If the record you are seeking is not in immediate view, you can use the Practice Manager QuickSearch window to find it easily. To search for an Entity, you must determine the field in which you wish to search and set it as the Sort Field--usually the Entity Name. For more detailed information on searching Listings in general, see Searching for Records in Listings.

To QuickSearch for an Entity

1 Limit the number of Entity records displayed, if you want, using QuickFilters, a User-defined Filter or a Query. See Filter the Entity Listing.

2 Choose the Search Field to be used for the search, such as Name or ID. The Search Field must be the field currently used to sort the Entity Listing.

- The column heading of the currently selected Search Field will contain either a ▲ (ascending sort order) or ▼ (descending sort order) symbol. This indicates that it is the current sort field.

- To choose a different Search Field, double-click on the column heading of the Search Field you want to use.

3. Type the first few characters applicable to the Search Field. All of the records that match the letters you have typed will be displayed in the Listing on your screen.

4. To search for Entity records **containing** particular characters, place the wildcard character "*"(an asterisk) before the search string.

5. If you select **Enter** the highlighted Entity record will open.

6. To clear the QuickSearch window for a new search,

   - Delete the characters in the QuickSearch Window
   - Hit the Esc key on your keyboard
   - Double-click on another column heading in the Entity Listing.

Changing the Entity Listing Layout

The columns on the Entity Listings simply display information from fields in your Entity records. The columns can also display fields included in an Entity Auxiliary. See Using an Entity Auxiliary. The number, order and size of the columns can be changed so that the information you consider most important will be in view. If you do not see Auxiliary Fields, contact your System Administrator.

Columns Typically Displayed

Although any of the columns can be displayed, you will find certain fields more useful than others:

- **Name.** The name of the Entity. The last name of an individual is displayed first, so that both individuals and organizations can be displayed together in alphabetical order.
- **Empl/Parent Org.** Identifies entity affiliations.
- **Addr. 1 Description, Addr. 1 Phone, etc.** Any Column heading beginning with "Addr. 1" is from the Entity's Primary Address, so you may wish these columns to be visible instead of secondary information.

Adding, Removing, Ordering and Resizing Columns

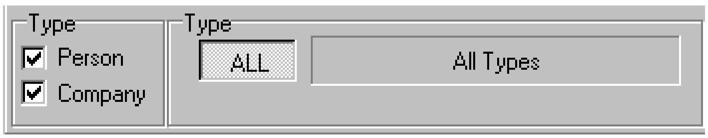
You can add, remove, order and resize columns on the Entity Listing, just like other Listings. To make these changes to the columns listed on the Column Heading Bar, you will access the Column Control Menu or drag the columns to the proper location and size. For detailed information on how to change the Layout of Listings, see Listing Components and Controls and Customizing the Listing Layout.

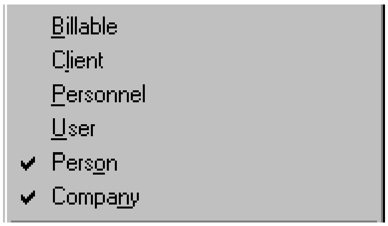
Filter the Entity Listing

You can limit the number of Entity records displayed in an Entity Listing using QuickFilters, User-defined Filters or Queries. In User Preferences, you can set an option that automatically activates a specific Filter or Query each time you open an Entity Listing, or utilize another option that presents the list of available Filters and Queries. See Setting Filter Options for Listings.

QuickFilters

You can access QuickFilters from the Filter Bar and from the View Menu.





Select QuickFilters from the Filter Bar to limit the records displayed. For detailed information on QuickFilters, see Using QuickFilters and Listing Components and Controls. Selecting:

- **Person:** Displays all Entity records for natural persons--individuals.
- **Company:** Displays all Entity records for organizations.

- **Type:** Displays Entity records for a particular Entity Type.
- **Personnel (View menu only):** Displays Entity records of all Personnel in your office.
- **User (View menu only):** Displays Entity records for all Users—those persons who have a right to log into Practice Manager.
- **Client (View menu only):** Displays Entity records for all Clients of your office.
- **Billable (View menu only):** Displays Entity records for all Entities who have been designated as "Billable"—responsible for fees and costs incurred in Matters.

User-Defined Filters and Queries

You can create, save and retrieve Filters and advanced Queries. For detailed information on using Filters and Queries, see Creating Filters to Select Records and Using Queries to Filter Listings. Filters and Queries can be used to create several types of useful Entity Lists that can be printed for various purposes. For instance, you could create lists of Entities by State or Zip Code; a list of Entities that are associated with a particular Client or insurance company; or lists of all courts, judges or court reporters. Some additional fields that you can use to create Filters or Queries for Entity Listings include:

- **Entity Role.** You can list all Entities that played a particular role in Matters.
- **Matter.** You can display a list of Entities involved in one or more specified Matters.
- **Organization/Parent.** You can create a list of Entities that are associated with a particular parent organization or group of organizations.

Retrieving a Saved Filter from the Treeview Box

In addition to other Filter options discussed above, the Entity Listing includes a convenient Filter retrieval feature in the Treeview box on the left side of the Listing Screen.

Displayed in Windows Explorer-like format, the Treeview Filter option allows you to view saved filters at a glance and make a selection from the list. For details, see Applying Filters from the Listing Treeview Box.

Modifying and Deleting Entity Addresses

Each Entity record can maintain numerous addresses. The Entity addresses are found under the Addresses tab within the Entity record. Each Entity address can be edited separately or deleted from the Address Listing.

To Modify an Entity Address

1 Display the Entity Listing.

2 Locate the Entity record and highlight it in the listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.

3 Open the Entity record:

- Double-click the highlighted Entity record
- Strike “Ctrl + O”
- Click on **Open** in the Speedbar
- Select **File** and then **Open** and then select **Selected Item** from the Practice Manager Menu.

4 Click on the **Addresses** tab.

5 Highlight the address you want to modify and click **Edit**. The Edit Address dialog will open.

6 Make whatever changes need to be made.

7 Click **Save** to save the changes and close the Edit Address dialog; click **Cancel** to close the Edit Address dialog without saving the changes.

To modify a Parent Address

Any organization which has been entered in the "Organization" field (for an individual) or the "Parent Organization" field (for an organization) of an Entity's record is termed the "Parent" of the Entity. If a Parent has been selected for an Entity, the Parent Entity's address can be made to appear in the "Child's" Address Listing by selecting the **View Parent Organization Addresses** checkbox, located on the Entity's Address Listing. If the Parent's Address is also selected as the "Primary Address" of the Entity, the complete address of the parent will appear on the Primary Address screen. An address marked as a "Parent" can only be viewed from the Entity record of the "Child". It cannot be edited from here. To edit a Parent address, find its Entity record in the Address Book Listing and make any changes you want.

To Delete an Entity Address

To delete an Entity Address, simply:

Follow steps 1-4 above to get to the Entity's address listing, then highlight the address you wish to delete, and select the **Delete** button below the listing.

Printing Entity Listings

Listings can be used to create a wide variety of useful lists and reports that can be viewed, printed or saved in a file. For instance, Entity Listings can be used to create lists of office personnel and Clients.

To create the report or schedule format

To create a report or schedule:

1 **Select Records.** Use QuickFilters, a User-defined Filter or a Query to select the Entity records that will be included in the list. See Filter the Entity Listing.

2 **Create a Layout.** Modify the columns in the Entity Listing layout to display the fields you want to be included in the report. See Changing the Entity Listing Layout.

3 **Sort the Records.** Choose the field to be used to sort the records. See Sorting Entity Listings.

4 **Print the Report.** You will be able to name the report and print it to the screen, the printer or a file. For detailed information on printing

Listings, see Printing Listings. Listings printed to a text file can be edited in your word-processor.

Creating New Entities

Creating a New Entity Record

You can create an Entity record from anywhere in Practice Manager but perhaps it is most convenient to do this from the Address Book or a Matter's Players tab. An Entity record created from a Matter's Players tab is automatically assigned to that Matter. Entities created from the global Address Book can be assigned to a Matter at any time. See Selecting Entities for Assignment. It is possible to activate the use of templates to assist you in the creation of Entity Records. See Using Templates When Creating Records.

Starting a New Entity Record

From the Address Book.

You can create a new Entity at any time from the Address Book.

1 Open the Address Book.

2 Click the **New** button on the Speedbar. The New Entity dialog will appear.

- Click on **Individual** to create an Entity record for an individual person.
- Click on **Organization** to create an Entity record for an organization.
-

3 If you have chosen **Use Entity Template** in User Preferences, the Entity Template Listing will appear. You can:

- Select a template, if you want to use a template to fill out the Entity record
- Create a new template
- Click **Close** to bypass the Entity Template Listing.

Regardless of your choice, a new Entity record screen will be displayed.

4 Complete the fields on the Entity record screen. (See **Complete the Entity**.)

From a Matter's Players Tab.

Even if you have not previously entered a particular Entity into your Address Book, you can create a new Entity record at the time you decide to assign it to a Matter.

1 Open the Matter to which the Entity will be assigned. See Displaying the Matter Listing.

2 Click the **Players** tab.

3 Click the **Assign** button on the Speedbar. A window will open containing your Address Book.

4 Click **New** button on the lower left of the Entity Listing screen. The New Entity dialog will appear.

- Click on **Individual** to create an Entity record for an individual person.
- Click on **Organization** to create an Entity record for an organization.

5 If you have chosen **Use Entity Template** in User Preferences, the Entity Template Listing will appear. You can:

- Select a template, if you want to use a template to fill out the Entity record

- Create a new template
- Click **Close** to bypass the Entity Template Listing.

Regardless of your choice, a new Entity record screen will be displayed.

6 Complete the fields on the Entity record screen. (See **Complete the Entity** below)

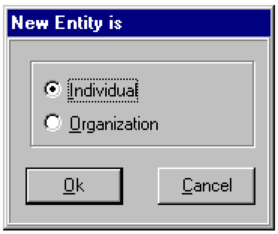
Using a shortcut

You can start a new Entity from anywhere in Practice Manager by using a shortcut.

1 Choose one of the following shortcuts.

- **Toolbar icon.** Click the New  icon and then select Entity.
- **Menu selection.** From the Practice Manager Menu, select **File** and then **New** and then select **AddressBook Item.**
- **Keystroke.** Hit Shift + F7.
-

The New Entity dialog will appear.



- Click on **Individual** to create an Entity record for an individual person.
- Click on **Organization** to create an Entity record for an organization.

2 If you have chosen **Use Entity Template** in User Preferences, the Entity Template Listing will appear. You can:

- Select a template, if you want to use a template to fill out the Entity record
- Create a new template

- Click **Close** to bypass the Entity Template Listing.

  Regardless of your choice, a new Entity record screen will be displayed.

3 Complete the fields on the Entity record screen. (See **Complete the Entity**.)

*Note: If you made a mistake selecting **Individual** or **Organization** in the **New Entity Is** dialog box, you have the ability to change this designation later. See Merging Entities.*

Complete the Entity

An Entity record is comprised of various tabs. As you fill out the record, you can move from tab to tab by clicking on the tab headings or by using the buttons on the bottom right of the screen:

- **Assign Contact.** Click this button to proceed to the Contacts tab where you can relate this record to other Entities.
- Previous. Click to open the previous tab.
- Next. Click to proceed to the next tab.
- Finish. Click to save and close the entire Entity Record.
- Cancel. Click to close the Entity record without saving.

To complete the new Entity record, consult the following topics:

- Entity Type, Role, Name and Affiliation.
- Entering Entity Addresses.
- Selecting Primary and Parent Addresses.
- Entering Other Details.
- Setting Properties for Staff and Users.
- Using an Entity Auxiliary.

Save the Entity Record

After you have completed the Entity Record, click the **Finish** button on the bottom right to save and close the record.

Entity Type, Role, Name and Affiliation

The first step in completing an Entity record is to enter the Entity Type, Role and Name information. An Entity's Role is always relative to a matter (i.e. Plaintiff, Witness etc.) and is therefore chosen only when an Entity is assigned to a Matter. Consequently, if you create an Entity record from the Address Book, which is a global listing, you will not be able to choose an Entity Role.

Entity Type

For every Entity record you create, select an Entity Type from the drop-down list. Choose the type that most accurately describes the characteristic of the Entity that is most useful for your firm. Keep in mind that Entity Type is used in other modules of Practice Manager such as those listed below. This may influence your choice.

- **Filtering:** You can filter Entities by their Entity Type. You may discover that Entity Type is the only criteria that can be used to create a particular filtered list of Entities you need for your office.
- **Sending GroupWare Items:** You can select the sender or recipient of a GroupWare item from a list based upon Entity Type, such as Personnel. If you want to use the Type field for this purpose, you should be careful to assign the appropriate Entity Type to all potential recipients or senders.
- **Type-Related Entity Tabs**: When you select some entity types, an additional tab specific to that type will appear at the top of the Entity record alongside the Other Details tab. For example, selecting **Judge/Arbitrator** as the Entity Type automatically triggers the creation of a **Judge Rules** tab.
- **Document Assembly**: The features and options available within the Document Assembly are based upon Entity Type.

Entity Role

When you assign an Entity to a Matter, you must select an Entity Role from the drop-down list. Again, this is the role the Entity plays in this particular Matter. Entity Role can be used to select specific Entities during document assembly. However, you are less likely to use Entity Role in a Filter; and it has no application in sending GroupWare Items.

Name and Contact Information

After entering the Entity Type and Entity Role, you will complete the fields relating to the name of the Entity and affiliation with another organization, if any. These include:

- **Gender**. The sex of the entity -- male, female or unknown.
- **Prefix.** The title of an individual, such as Mr., Mrs. or Dr. You can choose from the drop-down list or make your own entry, if it is not included in the list.
- **First name.** If you indicated that the Entity is a **Company** when creating the record, this field will not appear.
- **Middle.** Enter the middle name or initial of an individual. Make sure you include any necessary punctuation.
- **Last/Company Name.** Enter the last name of an individual or, for an organization, the full name of the organization.
- **Suffix.** For an individual, enter any other suffix that is included in his name. You must include any necessary punctuation, such as commas or periods. Examples include: ", Jr.", ", Sr." or "III".
- **Prof. Suffix.** Enter any professional suffix that may be used for an individual. You must include any necessary punctuation. This field is used to insert the professional suffix where needed in envelopes, letters and other documents during document assembly. Examples include: "Esquire" and "M.D.".
- **Salutation.** For an individual, the salutation is composed of the Title plus Last Name. It will be created automatically after you complete the **Last Name** field. If you make changes to these fields, it may not reflect those changes and you will have to create the correct Salutation manually.

- **DBA (Doing Business As).** For an organization, you can enter the name under which the Entity is doing business.

- **Job Title/Relation to parent.** For an individual, you can enter a Job Title. For a company, you can enter its relationship to the parent organization, such as affiliate, subsidiary or general partner.

- **Contact.** For an organization, you can enter the full name of a Contact. In document assembly, the Contact's name will be printed before the organization's name. Accordingly, if you use this field and you want to include the Contact's Title (Mr./Ms./Mrs.) in letters or envelopes, you should enter it as part of the Contact's name in the field.

Side: Orientation or Conflict Status

Just to the right of the **Entity Type** field is the **Side** field. This is the orientation or status for conflict-of-interest purposes. When the Entity is added to the Address Book, the orientation is assessed solely in relation to your office—the "Firm Side". When the Entity is assigned to a Matter, the orientation is also assessed in terms of the Entity's relationship to the Matter or the Client—the "Matter Side". The choices in this dropdown field are:

- **Pro.** The orientation or conflict status of the Entity is aligned with your office or the Client in the Matter. All Personnel in the office should be assigned an orientation of Pro.

- **Con.** The orientation or conflict status of the Entity is aligned against the office or the Client in the Matter. You will normally assign an orientation of Con to the adverse party in a Matter.

- **Neither.** If the Entity is neutral, you should select an orientation of Neither.

Entity Status

To the right of the **Side** field are three checkboxes. Click once to place a checkmark in applicable selections here:

- **On a Mailing list.** This box will be checked off automatically if you have assigned the entity to a mailing list under the **Mailing List** tab, which features a list of mailing lists (created by your System Administrator from within the Administration Menu) to which you can assign the Entity.

- To put the Entity on a Mailing List, highlight the list name in the **Available Mailing Lists** (left) pane and click on the button. You will then see it appear in the **Member of Mailing Lists** (right) pane.

- To remove the Entity from a Mailing List, highlight the field name in the **Member of Mailing Lists** (right) pane and click on the button. You will then see it appear in the left pane under **Available Mailing Lists**.

♦ **Client.** Any individual or organization that is your Client.

Note: *Normally, you should carefully limit the use of this Property to the "true" Client in a Matter. If your office is representing a corporation, only the corporation, not the officers, shareholders, directors or other representatives, should be designated as the Client. On the other hand, there is nothing in Practice Manager that prohibits you from designating any Entity as the Client, if your office has a good reason to do so.*

♦ **Billable.** Any Entity that is responsible to pay the bill, but not legally the "Client". For instance, in insurance defense cases, the responsible insurance carrier will be designated as "Billable", while the insured will be considered the "Client".

Organization and Parent Organization

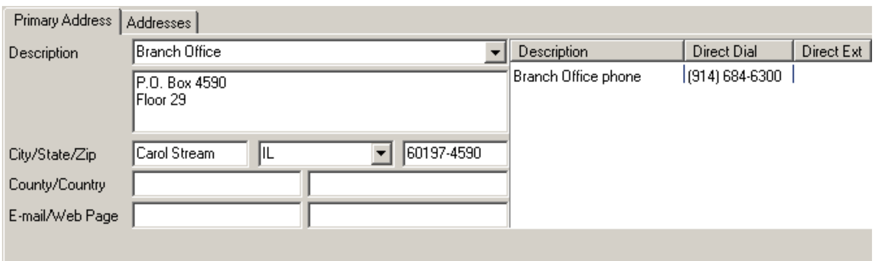
If you are entering an individual who works for a company, or entering a company that is affiliated with another organization, complete the **Organization** field (for individuals) or the **Parent Organization** field (for companies). You will make a selection from the drop-down list in this field. If the Parent Organization is not yet on your Entities List, you should add it. For both individuals and companies, the address of the entity selected here will then be accessible under the Addresses tab when you display the Parent Address. If you wish, you can designate it as the Primary Address for this Entity. NOTE: The Primary Address is the address used for Document Assembly. See Selecting Primary and Parent Addresses.

Entering Entity Addresses

You can enter as many addresses for an Entity as you want in Practice Manager. For each address you can include a label or description for the address to distinguish it from other addresses. One of the addresses will be designated the **Primary** address for the Entity and one of them can be designated as the**Secondary** address. The significance of the Primary address is that it is the address that will be selected for use in document assembly, if you choose to address a letter to an Entity or include the Entity in a certificate of service. The Primary address will appear in the fields visible when you click on the **Primary Address** tab. You can change the designation of an address from secondary to primary at any time. You can even display the addresses of another organization as the Primary or a Secondary Address for the Entity, if its name is entered in the Organization field (for an individual) or Parent Organization field (for an organization). For more on this, see Selecting Primary and Parent Addresses.

Entering the Primary Address

1 In the Entity Record, click on the Primary Address tab. You will see the Primary Address entry screen.



2 Choose a description for the address from the Description drop-down list, such as “Home” or “Office”. The Description list is created by your Practice Manager Administrator and you cannot change it yourself.

3 Enter the details of the address in the fields provided.

4 Enter the Entity’s e-mail address.

Note: *The E-mail address entered in this field may be used to address GroupWare Items. If you double-click on the e-mail address here, your email program automatically opens with a blank message addressed to that person – or, if your system is set up for it, a list of Email message templates will appear for you to choose to help you create a message.*

- For office personnel, you may include the initials or other number used internally to send messages through your internal E-mail system.

- For Entities outside of your office, use the complete E-mail address, including domain name. For example: fsmith@home.com.

5 If the Entity maintains a Web site, enter its domain name in the **Web Page** field. For example, http://www.law.com/.

Note: This field is hyperlinked so that double-clicking on the domain name opens the site.

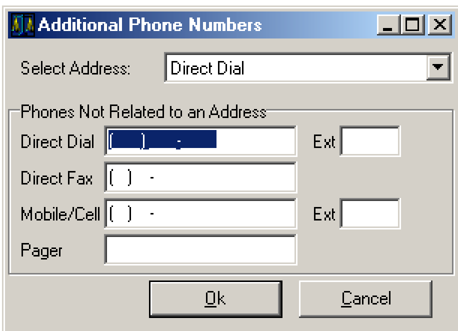
Entering Phone Numbers

You can enter up to three telephone numbers for each address. To do this, you can display the Addresses tab, open the address in question and type the number into a phone field. Or you can add it from the Phone Listing section of the entity's Primary Address tab. To do this:

1 Click on the Primary Address tab to open it, if it is not displayed already.

2 You will see the telephone listing on the right side of the tab. Select the **New** button beneath it.

3 A Phone Data Entry dialog will appear. From the dropdown, select the Address to which the phone number belongs. The dialogue will expand:



4 Make your entry, and click **OK**.

Edit a Phone Number

1. Click on the Addresses tab, open the address to which the number belongs and edit the phone number field directly from there; or,
2. Click on the Primary Address tab and click the Edit button below the telephone listing on the right. The Phone Data Entry dialogue will open. Select the address to which the number belongs and then make your changes. Click **OK** to save.

Delete a Phone Number

Click on the Primary Address tab, highlight the phone number to be deleted and click the **Delete** button.

To copy an address

You also have the option of copying address details into your new entity record from another Entity record to save data entry time.

1. In the Entity Record, click on the **Primary Address** tab if it is not already displayed.
2. Click on the Address button. An Entity lookup list will appear.
3. Select an address to copy from the list and click the **Select** button. The system will copy that Entity's address information into the Primary Address fields of the new Entity.
4. Next, a prompt will appear asking you if you wish to copy phone and fax numbers.
   - Click **Yes** if you wish to copy in this information as well, or
   - Click **No** and enter the appropriate numbers yourself.

Later you can change this address from the Primary to Secondary if you wish. See Selecting Primary and Parent Addresses.

To enter additional addresses

Say an Entity has multiple addresses. You can also enter these additional Addresses:

1. Click on the **Addresses** tab to display the list of all existing addresses for the Entity.
2. Click the **New** button to enter a new address. The Add Address screen appears. It is identical to the Primary Address screen.
3. Complete the fields for the address.

4 Click **Save** when you are done. Click **Close** if you decide not to save the new address.

5 Repeat the foregoing steps to add each additional address to the list.

Selecting Primary and Secondary Addresses

Practice Manager makes a distinction between the **Primary** address for an Entity and all other addresses included in an Entity record. The Primary address is the address that you intend to use to contact an Entity in the Matter. It is also the address that will be used in document assembly, if you choose to address a letter to an Entity or include the Entity in a certificate of service. If you have entered an Entity in the **Parent Organization** (for an Organization) or **Organization** (for an individual) fields, the Organization is referred to as the Parent and you can designate the address of the Parent as the Primary address for the Entity or thethe Secondary addresses. If the Parent address is designated as Primary, it will be visible on the Primary Address screen.

Primary Address

If an Entity only has one address, it will be designated automatically as the Primary address of the Entity. If you add additional addresses, you can make any one of them the Primary address.

To designate an address as Primary Address or Secondary:

1 In the Entity record, click on the Addresses tab.

2 Highlight the address in the Address Listing that you want to designate as Primary or Secondary.

3 Highlight and click the Set as Primary button to designate the address as Primary or **Set As Secondary** button to designate it as Secondary. The word “Primary” or “Secondary” will appear in the Type column next to the highlighted address.

4 ***Note:*** *Only one address at a time can be designated as Primary or Secondary.*

5 To designate a different address as Primary, highlight that address and repeat the process.

Parent Addresses

If an Entity has one or more of its own addresses and also uses the addresses of an organization or parent organization, you can choose to view or not to view the addresses of the Parent. You can also designate any address of the Parent as Primary or Secondary.

To create a Parent Address:

Any organization which has been entered in the **Organization** field (for an individual) or the **Parent Organization** field (for an organization) of an Entity's record is termed the "Parent" of the Entity.

To view the address of a Parent Entity record:

1. In the Entity record, click on the Addresses tab.
2. Click the View Parent Address checkbox. The addresses of the Parent Entity will become visible in the Addresses listing. There will be a checkmark in the Parent column to signify that an address is the address of the Parent organization.

To make a Parent Entity the Primary address:

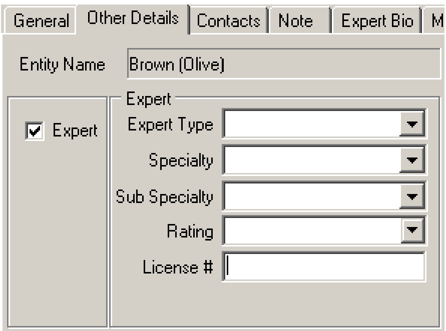
1. In the Entity record, click on the **Addresses** tab.
2. Click the **View Parent Address** checkbox.
3. Highlight an address of the Parent Entity in the Address listing and select it as the Primary address, following the steps set forth above. The address of the Parent Entity will now be visible when you click on the Primary Address tab.

Other Details Tab

Entering Other Details

Click on the Other Details tab to enter more information on an Entity. Fields on the Other Details tab include:

- **Entity Name** and the automatically assigned **ID** number appear at the top, carried over from the Entity's General tab.
- **Nickname.** Fill in, if any. This can be for an individual or for an organization's contact person.
- **Expert.** Click to place a checkmark in this box, if the Entity is an Expert. This triggers the appearance of an extra tab labeled **Expert Bio**. Use this tab to type or paste in an expert's curriculum vitae. Also, some additional fields will appear here on the Other Details tab for you to complete:



  - **Expert Type.** Select the Expert's field of expertise from the dropdown.
  - **Specialty.** Select the area of specialty from the drop down.
  - **Sub Specialty.** Further specify specialty, if necessary.
  - **Rating.** Select a rating from the dropdown.
  - **License #.** Record Expert's license number, if any.
- **Staff** and **User.** These check boxes determine important properties relative to your office personnel. See Setting Properties for Staff and Users.

- **Judge.** If you selected Judge/Arbitrator as the Entity Type on the General Tab, this box will be automatically checked and a **Judge Rules** tab will be available for this Entity. If Judge/Arbitrator is not selected as the Type, you will not be able to check this box. The following additional fields will also be displayed on the Other Details tab next to the Judge checkbox:
  - **Room#.** Fill in the Courtroom number for this Judge.
  - **Part#.** Fill in the Part number for this Judge.
- **DOB.** Enter a Date of Birth or select the Calendar Control button and select it from the calendar. This option active only for an individual.
- **SSN.** Enter the Entity's Social Security Number. This option active only for an individual.
- **Marital Status.** Select from the dropdown.
- **Maiden Name.** Enter maiden name, if any.
- If the entity is a foreigner, select a **Nationality** from the dropdown list. This list is maintained under the Address Book Settings within the Admin Menu.
- Indicate what language the entity speaks by selecting it from the dropdown in the **Language** field and if he or she requires a translator check off the **Needs Translator** box.
- If the entity is deceased, check the **Deceased** box.
- **DOD.** Date of Death. If this field is applicable, you will specify the appropriate date by entering it manually or selecting the Calendar Control button and selecting from the calendar.
- If the entity is a **Resident Alien**, check this box and enter his or her **Registration #** in the field on the right.
- Indicate by checking the appropriate box whether the entity is an **Infant**, **Incompetent** or **Deceased**.
- Select the entity's **Occupation** from the dropdown list.
- Indicate any known hobbies the entity may have by entering it in the **Hobbies** field

- Select the entity’s **Religion** from the dropdown.

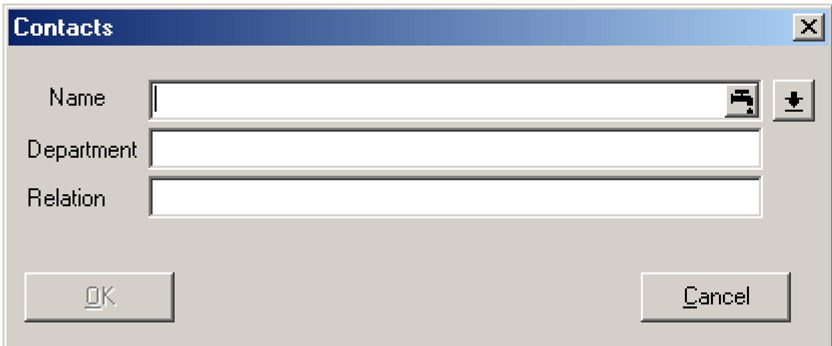
Contacts Tab

The Contacts Tab contains a listing of other Entities from your address book that are alternate contacts for the person or organization. This is not to be confused with Related Entities. (see Creating Entity Relationships). Entities listed under the Contacts tab are only those that are manually added from the Contacts tab itself.

To add a contact

To add a contact:

1. Select the **New** button on the bottom right of the tab. A Contact dialog will appear for you to complete:



2. Start typing the name of the entity in the Name field or select the  button to open your Address Book in order to make a selection.

3. Fill out Department and Relation fields as applicable. Then click **OK**. The Contact will now appear on the Contact listing.

   Note: A contact will not appear on the related entity listing for this record, but only here on the Contacts tab.

To edit a contact

To edit a contact record:

1. Highlight it in the listing and click the Edit button on the lower right. The Contact dialog will open.

2. Make desired changes and click **OK**.

To delete a contact

Delete a contact by highlighting it in the listing and clicking the **Delete** button on the lower right.

Notes Tab

Record any notes you wish regarding the Entity under the Notes Tab. The capacity of the memo field that comprises this tab is very large. It was designed to accommodate extensive notes. Keep in mind that the Notes Module might be a more appropriate place to store certain kinds of information that can then be linked to the Entity Record. You can create multiple notes by clicking on the Notes button at the bottom of the screen. These Entity Notes are related to the Entity record and will be present no matter where you may be vewing the Entity from (Matter or Entity).

To create a phone call note

1 From the Entity record, select the Notes button.

2 From the Entity Notes Listing, select the New Phone Call button.

3 You may choose to:

- **Place a call**. Generate a note regarding a phone call that you made.
- **Receive a call**. Generate a note regarding a phone call that you received.
- **Phone Message**. Generate a note regarding a phone call that you received for another user.

4 Enter the Subject line and Message. All other fields on the Details tab are pre-filled based on your Login Name and the Entity record that you are in.

5 You may choose to relate a Phone call note to a particular Matter, Entity, or Issue by selecting the appropriate tabs and linking the Note as desired.

Setting Staff and User Status

When you are entering an Entity who is a member of your office you will need to pay close attention to options on the Other Details Tab. You will use the **Staff** and **User** checkboxes here to designate an Entity as a member of your office and user of Practice Manager. If an Entity is designated a member of the Staff or User categories, other fields in the Properties section become active and must be completed for the Entity.

Establish an Entity as a Staff Member or User:

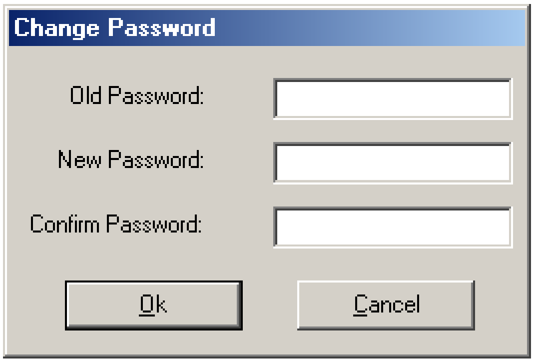
1. Display the Global Entity Listing or the Matter Entity Listing.
2. Create a new Entity record or locate and open an existing Entity record. To locate an existing Entity record, you can limit the number of records displayed by using a QuickFilters, a User-defined Filter or a Query, see Filter the Entity Listing, or search for a particular Entity using the QuickSearch Window, see Searching the Entity Listing.
3. Click on the Other Details tab.
4. On the left side of the screen you will see **Staff** and **User** checkboxes.
   - **Staff**. Any employee of your office should be designated as “Staff”. When you click in the Staff box and place a checkmark there, additional fields appear for you to complete (see below), and a Rates tab appears at the top of the screen. Most entities designated as “Staff” will also be “Users”, but not necessarily.
   - **User**. Any Entity that will log into Practice Manager. Usually, an Entity that is designated a “User” will also be an employee, but that will not always be the case. You may want to give a non-employee, such as a computer consultant or network engineer, the status of User.

Additional Properties for Staff and Users

Once you have designated a person as belonging to the Staff and/or User categories, certain other fields, applicable to these types of Entities, will appear on the Other Details screen.

Fields for Users

- **Login Name.** Type in the initials that this person will enter to login to the program.
- **Security Level.** Select the appropriate security level for the user. Your Practice Manager Administrator establishes security settings.
- **Initials.** Staff or Users can enter their initials in this field. These initials are also used in document assembly. For example, the User of the computer where a document is drafted is considered the Creator of the document. The Creator's initials (taken from this field) can be incorporated in a template as the initials of the secretary or paralegal who prepared a letter for signature by the Author, whose initials can appear with them in proper format.
- **Default Site.** If your firm uses different sites, say for different offices within your firm, you will select the site to which this user is assigned.
- **Password.** A User can change his or her password from the Other Details tab screen. To change the password:



1. Click on the **Password** button to display the Change Password dialog:
2. Enter the Entity's old password, if any.
3. Enter the new password in the **New Password** field.
4. Verify the new password again in the **Confirm Password** field.
5. Click **OK** when done.

Fields for Staff

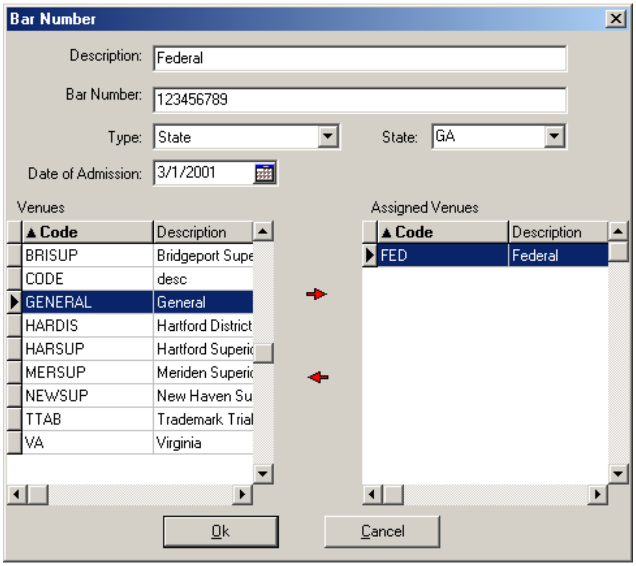
Below are fields that display when you check off either Staff or User. Normally, if a person is a Staff member, he or she will also be a User.

- **Other Initials.** Again, insert the initials of the Entity. See explanation above.

- **Bar Number.** Bar Number allows you to enter bar numbers for Staff Entities who are attorneys. You can enter a Bar Number for each Venue in which the attorney practices. To enter Bar Numbers:

1 Click on the **Require Bar Number** checkbox. The Bar Number button will become visible.

2 Click on the **Bar Number** button. The Bar Numbers list will be displayed.



3 Click **New** to add a bar number to the Bar Numbers list.

4 Enter the Description.

5 Enter the Entity's Bar Number.

6 Select the Type of Bar Number from the Type dropdown.

7 Identify the Date of Admission to the Bar.

8 Select the applicable State from the State dropdown

9 You can assign the venue by highlightlighting the applicable Venue in the **Venues** window. Select the  button to assign the venue. The appropriate venue then appears as a highlighted selection in the **Assigned Venues** window.

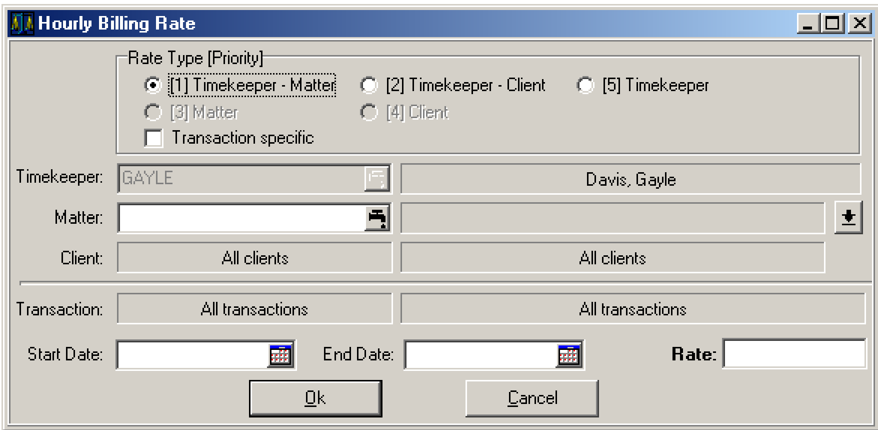
10 Select the **OK** button when you are finished.

Entering Billing Rates for Staff

When you activate the Staff checkbox, a Rates Tab will appear within the Entity record. This tab features a listing of all billing rates relative to this staff person. You can use the Rates tab to enter one or several billing rates for the staff member.

To add a billing rate

To add a Rate Entry, select the **New** button on the bottom right of the tab. A Billing Rate Data Entry Dialog will appear for you to complete:



- **Rate Type.** Click the appropriate radio button regarding how your office will bill for time under this rate:
- **Timekeeper-Matter.** Rate specific to this Timekeeper in a specific matter.
- **Timekeeper-Client.** Rate for this Timekeeper specific to a client.
- **Matter.** Specify matter, if appropriate (depends on rate type. See above).

- **Client.** Specify client, if appropriate (depends on rate type. See above).
- **Timekeeper.** Rate specific to this Timekeeper regardless of matter.
- **Transaction Specific.** Fee figured on a transaction basis. For example, a Pleading has a set fee regardless of time. After checking this box, you will select a transaction below.

NOTE: The rate types presented above appear in their order of precedence. For instance, Timekeeper Matter will always take precedence over Timekeeper Client, and Client will always take precedence over Timekeeper..

- **Rate.** Manually type in the corresponding hourly billing rate.
- **Start Date/End Date.** Enter the dates the rate is to be in effect.

Once you have completed the dialog, select the **OK** button.

To edit a rate entry

To edit an entry, simply highlight it in the listing and select the **Edit** button. The dialog will open again and you can make changes.

To delete a rate

To delete an entry, highlight it on the listing and select the **Delete** button.

Using an Entity Auxiliary

Using FormDesigner, your Practice Manager Administrator can create an Entity Auxiliary, containing additional data-entry fields that will appear as an additional tabbed screen in a particular Entity record. Entity Auxiliaries can be customized by Entity Type. An Entity Auxiliary is normally used to record information about Clients or other types of Entities that would not otherwise be entered in an Entity record or one of the other standard modules of Practice Manager. The data-entry fields in an Entity Auxiliary can be used to record supplemental information about an Entity and can also be configured to “lookup” information from the fields in other parts Practice Manager, such as other Entity records. For instance, in a class action, you could use an Entity Auxiliary to record the specific details about the injuries suffered by each member of the class. Or you could use an Entity Auxiliary to record the curriculum vitae of an expert witness. The information entered in the fields of an Entity Auxiliary can be merged into word-processing documents during automated document assembly.

An Entity Auxiliary will have its own tab, appropriately labeled and located to the left of the **TreeView** tab of an Entity record

To enter information in a Entity Auxiliary screen:

1. Display the Entity Listing.
2. Find the Entity record in the Entity Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing, or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.
3. To open the Entity record:
   - Double-click the highlighted Entity record
   - Hit “Ctrl + O”
   - Click on **Open** in the Speedbar
   - Select **File** and then **Open** and then select **Selected Item** from the Practice Manager Menu.
4. Click on the tab for the Entity Auxiliary.
5. If the Entity Auxiliary has multiple tabs, click on the tab of the screen where you want to enter information.
6. Enter information in an Entity Auxiliary in exactly the same way you enter information in the fields in any other screen in Practice Manager. The information in the Entity Auxiliary screens will be saved automatically when you close the Entity.
7. To close the Entity record, select the **Close** button on the Speedbar.

Modifying and Deleting Entity Information

Once you have created an Entity record, you can modify or delete it at any time. Entity records are modified or deleted from one of the Entity Listings.

To modify an entity record

1. Display the Entity Listing.
2. Locate the Entity record in the Entity Listing. You can use a QuickFilter, User-defined Filter or Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.
3. To open the Entity record:
   - Double-click the highlighted Entity record
   - Hit “Ctrl + O”
   - Click on **Open** in the Speedbar
   - Select **File** and then **Open** and then select **Selected Item** from the Practice Manager Menu.
   -
4. Make any changes you want and click **Save** to close and save the modified record.

To delete an entity record

1. Display the Entity Listing.
2. Locate the Entity record in the Entity Listing. You can use a QuickFilter, User-defined Filter or Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.
3. Highlight the Entity record you wish to delete.
4. To delete the Entity record:
   - Hit Ctrl + D
   - Select **File** and then select **Delete** from the Practice Manager Menu.

NOTE: Deleting an Entity record deletes all information associated with the Entity. Careful consideration should be given prior to Deleting an Entity Record.

Merging Entities

Practice Manager provides you with an additional feature to manage your Address Book. You can merge two entities, carrying over addresses, phone numbers and other information, as well as any and all links. This is especially useful if an entity has been entered twice and different users inadvertently established links to both records. Using the Entity Merge feature, you are able to transfer all information and links to one record, and delete the other, avoiding the problem of confusing duplicates in your address book. Also use the feature to copy addresses from one Entity to another, or to copy links belonging just to one specific module. The Entity Merge screen also allows you to edit an entity prior to merging. This includes the ability to change an entity from an individual into an organization and vice versa.

Initiate a Merge

During this process you will be merging information from a Source Record into a Target Record.

There are two ways to begin an Entity merge:

From the Entity Listing

1. Display the Entity Listing, either the Global Entity Listing (Address Book) or the Matter Entity Listing (Matter Players Tab) where the Target Entity into which you wish to merge information appears.
2. Locate the Entity record for the Entity and highlight it in the listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing. You can also customize the listing layout.
3. From the View Menu select **Entity Merge**. An Entity Merge dialog will appear, with only the record you selected listed at the top of the screen in the Target Entity field. The profile tab on the bottom portion of the screen will display details related to this record for your reference. You can edit this record if you wish. (See *Editing an Entity* below.)

From Anywhere in Practice Manager

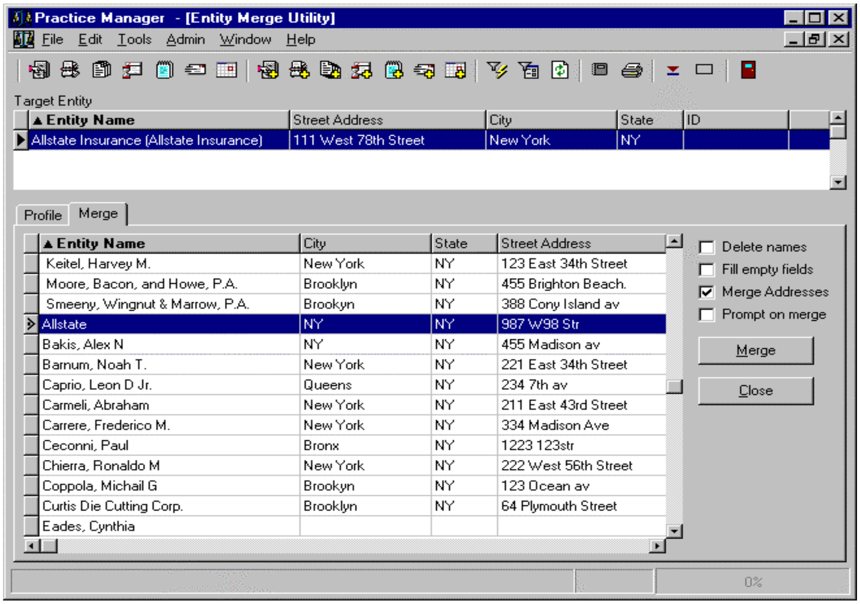
1 From the Practice Manager menu select **Tools** and then select **Entity Merge**. The Entity Merge dialog appears.

2 From the listing that appears in the Target Entity field at the top of the dialog, locate and highlight the record into which you wish to merge information. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing. You can also customize the listing layout. The profile tab on the bottom portion of the screen will display details related to this record for your reference. You can edit this record if you wish. (See *Editing an Entity* below.)

Execute a Merge

After you have started the merge in either way outlined above,

1 Click the **Merge** Tab on the bottom portion of the dialog. It will contain your Address Book.



2 Locate and highlight the source record whose information you wish to merge into the target record highlighted above. Again, you can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the

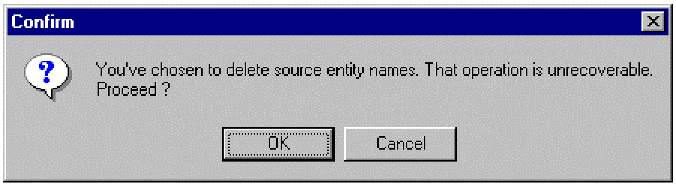
QuickSearch Window to find the Entity record, see Searching the Entity Listing. You can also customize the listing layout.

To select multiple source entities, simply hold down the Ctrl key on your keyboard and click once on each entity you wish to select.

Note: You also have the option of viewing a quick reference list of matters or entities related to an entity in either listing on the Merge tab. See *View Related Records* below.

3 Select desired merge options:

- Delete Names. Selecting this option will cause the Source record(s) to be deleted as a result of the merge. You will receive the following warning prompt if this feature is activated:



4 Click **OK** to proceed or **Cancel** to stop the merge and change your selection.

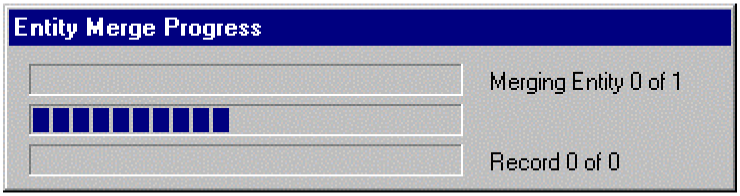
- **Fill Empty Fields.** Check this box if you would like empty fields in the target record to be filled in with information from the source record. If a field contains conflicting information, the target record will not be changed.

- **Merge Addresses.** Check this box if you would like all source addresses to be merged into the target record. The Primary address of the Target Entity will remain the same. If this box in not checked, addresses will not be merged into the target record.

- **Prompt on Merge.** Selecting this option will cause a dialog to display when you select the Merge button:

This dialog enables you to specify that only record links to specific modules will be copied from the source record to the target record. For example, this might be a handy way to assign all notes related to one entity to another without merging other information. Check the box next to each module you wish to include. If you wish to include all, there is really no need to activate this feature, for Practice Manager automatically merges links to all modules anyway.

5 Select the **Merge** button. A Merge Progress Dialog will appear while the records are being merged.



6 When the Merge Process Dialog box disappears, the merge is complete.

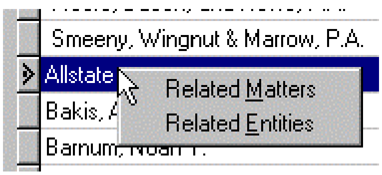
NOTE: The process of Merging Entities is known to cause delays in the system. You may experience a significant decrease in system performance during Entity Merge.

View Related Records

You may wish to view record links prior to merging. Without closing the Merge Entity dialog, you are able to view a quick reference list of matters or entities related to a record on either the target entity or source entity listing. To do this:

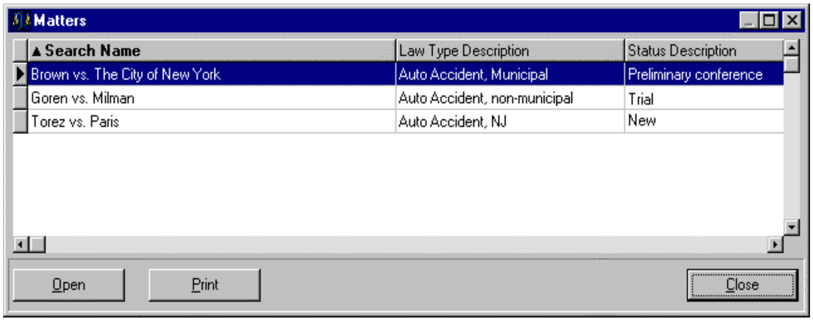
1 Locate and highlight the Entity whose links you wish to view in the listing.

2 Right mouse click on the record. A menu will appear:



- Select **Related Entities** and the related entities dialog will appear. You can view or create a link to another entity here. See Creating Entity Relationships for details.

- Select **Related Matters** and a dialog showing all matters linked to that record will appear:



3. To view a matter, highlight it and select Open.
4. To print the list, click Print.
5. To exit this dialog and return to the Entity Merge Screen select Close.

Edit an Entity from the Entity Merge Screen

If you wish to make changes to a target record prior to merging, you can do this from the Entity Merge screen as well.

After you follow the procedure outlined above for initiating a merge, the Entity Merge screen will appear with the Profile tab active on the bottom portion of the screen. The Profile tab displays details related to the target record highlighted above, and also contains an edit option. To edit the target record:

1. Select the Edit button on the right of the Profile tab.
2. Respond to the prompt that appears. It will ask if you wish to convert the Entity to an Organization (if it is an Individual) or to an Individual (if it is an Organization).
   - Click Yes and the Entity record will open in the new format for editing.
   - Click No and the Entity record will open in the old format for editing.
   - Click **Cancel** to return to the Entity Merge Screen.
3. Make desired changes to the Entity record and Save.

Assigning Entities to a Matter

Meaning of Assignment

When anyone in your office creates a record for an Entity, Practice Manager places it in the Address Book. For each Matter that your office opens, certain Entities will be assigned to it and given a role in the matter. Do not confuse Role with Entity Type. **Type** is a general classification and **Role** is specific to a matter. For instance, an attorney might be assigned the Role "Opposing Counsel", or a medical service provider might be assigned the Role "Treating Physician". Once an Entity is assigned to a Matter, it will appear in the Matter Entity Listing for the Matter, found on the matter's **Players** tab.

Significance of Assignment

In Practice Manager all Entities that have a relationship to the Matter should be assigned to the Matter, including the Client, the attorneys responsible for the Matter, staff personnel assigned to the Matter, other counsel, witnesses and any other Entity that might receive or submit documents in the Matter. Assigning Entities to Matters not only speeds up your work by giving you quick access to important information about Entities, such as telephone numbers and notes of conversations, but it is necessary for the proper operation of Practice Manager. The system uses the assignment for several purposes, including:

- **Conflicts Checking.** Practice Manager uses the Entity's assignment to Matters to conduct conflict-of-interest checks.
- **Documents.** Practice Manager uses the Entity's assignment to identify the author of a document in Document Profiles.
- **Document Assembly.** In Document Assembly, Practice Manager chooses Entities as the recipients of correspondence or for inclusion in certificates of services through their assignment to the Matter.
- **Timeslips.** To record time and expenses properly, Practice Manager needs to know what Personnel are assigned to the Matter.

Assignment

In Practice Manager, Entities are assigned to a Matter from the Matter Entity Listing. At this time, they are assigned a specific **Role** as well. There are two ways to assign Entities to Matters:

- **Individual Assignment.** Entities can be assigned to the Matter one at a time. This is the normal way that you will assign an Entity to a Matter. See Selecting Entities for Assignment.

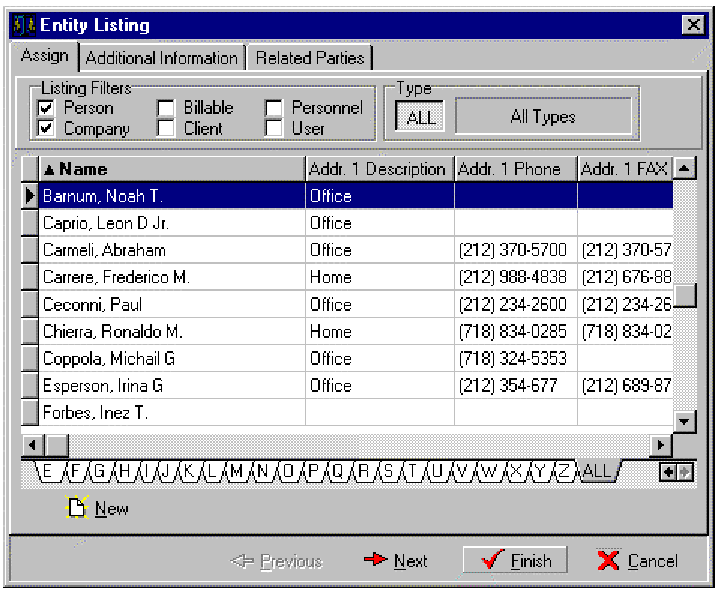
- **Group Assignment.** You can assign a group of Entities to a Matter. This is done by assigning all Entities from one or more Matters to another. See Assigning Entities from Other Matters.

To Assign an Entity to a Matter

An Entity is assigned to a Matter from the Matter Players tab, within the Matter itself. Here you can assign an existing Entity simply by selecting it from the Address Book. At the same time the selection is made, the Entity's Role in the Matter is also chosen. If an Entity record does not already exist, it can be created and assigned to the Matter at the same time. If an Entity is a Plaintiff or Defendant you will want to specify that they are a **Party** in the matter as well.

1 Open an Existing Matter and click on the **Players** tab to display the Matter Entities Listing.

2 Click **Assign**. Your Address Book Listing will appear.



3 If a record for the Entity already exists, locate it here in the Address Book Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.

If the Entity does not exist you can add it now. Select the **New** button on the lower left. See Creating a New Entity Record for assistance. In addition to completing the usual fields on the new Entity Record, you will complete a few fields relative to the matter as well. They are:

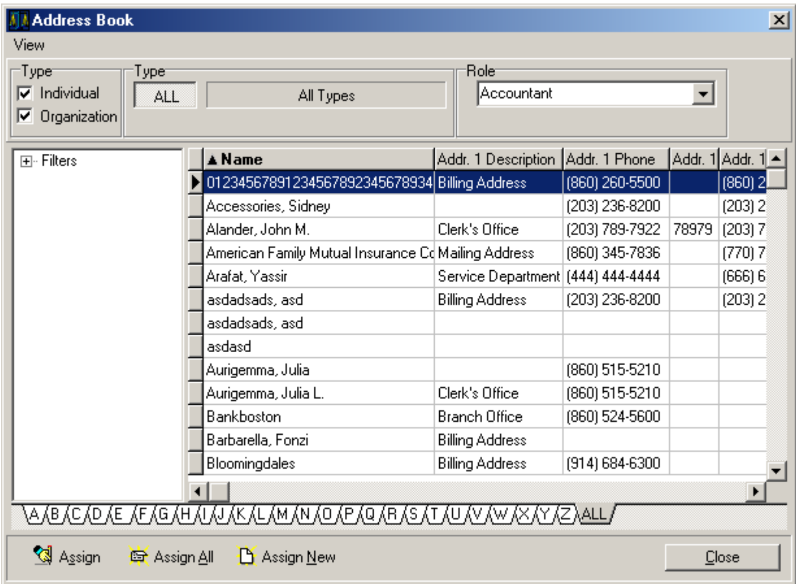
- **Role**. Entity's Role in this particular matter.
- **Role Details.** Further details, if any.
- **Matter Side.** Entity's side in the matter.
- **Party.** If the Entity is a Plaintiff or Defendant this box should be checked.
- **Party Type.** If the Entity is a Party, type will be specified here.
- **Report To.** If the Entity is the client

Again, information in these fields will only affect the current Matter.

4 Highlight the Entity record in the Listing.

5 Select the Next button at the bottom of this Entity Listing window.

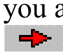
6 The **Additional Information** tab will open for you to complete:



- **Role.** Select the appropriate role from the dropdown list.

- **Role Details.** Enter any further details if necessary.
- **Entity Status.** Check off the appropriate status(es):
- **Client.** Check if this entity is your client.
- **Party.** Check if the entity is a party in the matter – i.e. if you want the entity to appear on plaintiff or defendant dropdown lists. (If you do not check the box, the entity will appear only on this Matter's Entity listing, not on these other lookups.) Also select Party type from the adjacent dropdown.
- **Send Bill/Report to.** Check if the entity is also the billable party.
- **Side.** Select the Entity's side in this particular Matter. (If you are adding a new entity, this will appear on the Entity Record as **Matter Side**.) See Entity Type, Role, Name and Affiliation for details on your choices here.
- **Primary Address.** You also have the option of selecting a Primary Address for this matter. The Primary Address is the address used in Document Assembly as well as the specific address assigned to a Matter. If the address is later updated in the entity record it will automatically be updated in the matter. If you do not want this to happen, you can check the box titled **If Entity's primary address is replaced in Address book – do not replace it automatically on a matter**.

7 After completing the Additional Information tab, click the Next button.

8 The Related Parties tab will open. Here you can specify whether or not another party in the matter is related to the party you are adding. Simply highlight the name of the relation, and select the  button. In the Relation field at bottom, specify the nature of the relationship.

9 Depending upon what Role you selected, a Specials tab may appear. The fields it contains are related to and depend upon the Role selected. For example, when you select the role of Hospital, the Specials tab contains information from the Medicals screen. You can add treatment information here now or add it later via the Medicals screen.

10 Click the **Finish** button. The Entity has been assigned to the Matter.

To Assign Entities from Other Matters

Normally, you will assign Entities individually to a Matter. If you have assigned some or all of the same Entities to another Matter and you want to assign them to the current Matter, Practice Manager allows you to assign the Entities from the other Matter *en masse*, as a way to speed up the assignment process. This process will carry over the Entity Type and Role assignments from the other Matter to the new Matter. You can edit these assignments in the Matter Entity Listing on the Players tab.

1. Open an Existing Matter and click on the **Players** tab to display the Matter Entities Listing.
2. Select the **Assign From** button. A separate window will open displaying the Address Book Listing.
3. Locate the Matter from which Entities will be assigned to the current Matter and highlight it in the Matter Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Matters displayed, see Filter the Matter Listing or use the QuickSearch Window to find the Matter, see Searching the Matter Listing.
4. Click **Select**. All of the Entities from the selected Matter will now be assigned to the current Matter.
5. If you need to change the Role of the Entity, open the Entity record from the new matter's Players tab and select a different Role from the Role drop-down list.

Modifying or Removing an Entity Assignment

You can modify the Entity Type or change the Role of an Entity that has been assigned to a Matter. You can also completely remove an Entity's assignment from the Matter. Removing an Entity's assignment severs the link between the Entity record and the Matter Entity Listing, but does not remove the Entity record from the Global Address Book.

To Modify an Entity Assignment

1. Open an Existing Matter and click on the **Players** tab to display the Matter Entities Listing.
2. Locate and highlight the Entity record in the Matter Entity Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use

the QuickSearch Window to find the Entity record, see Searching the Entity Listing.

3 Click **Open** to open the Entity record for editing.

4 You can make any changes you wish to the Entity record. When you open an Entity from a Matter, some fields relating only to that matter are visible. These do not appear when you open the record from the Global Address Book Listing. They are:

- **Role**. Entity's Role in this particular matter.
- **Role Details.** Further details, if any.
- **Matter Side.** Entity's Side in the matter.
- **Party.** If the Entity is a Plaintiff or Defendant this box will be checked.
- **Party Type.** If the Entity is a Party, type will be specified here.
- **Report To.** If the Entity is the client

Editing these fields will only affect the current Matter. Any changes you make to other fields will automatically update the Entity record in the Global Address Book Listing or the Matter Entity Listing for any other Matter in Practice Manager.

To Remove an Entity Assignment

1 Open an Existing Matter and click on the **Players** tab to display the Matter Entities Listing.

2 Locate and highlight the Entity record in the Matter Entity Listing. You can use QuickFilters, a User-define Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing. To remove the Entity from the current Matter:

- Select **File** and then select **Delete**
- Hit Ctrl + D

3 The confirmation prompt appears:

- Select the **Yes** button to complete removal of the assignment.
- Select the **No** button to cancel removal of the assignment.

4 The Entity's assignment will be removed, but the Entity record will not otherwise be affected.

Entity Relationships and Conflicts of Interest

Creating Entity Relationships

Practice Manager allows you to create and view the relationship of Entities to Matters and to other Entities in three ways:

- **Entity's Role in Matter.** An Entity's relationship to a Matter is automatically established when you select the Entity's role and assign the Entity to a Matter.
- **Entity's Relationship to a Parent or Organization.** Whenever you select a Parent Organization (for a Company) or an Organization (for an individual) in an Entity record, the Entity's relationship to that organization is automatically recorded in Practice Manager.
- **Manually Assigning Entities.** In addition to the relationships that are automatically created in Practice Manager, an Entity can be related to other Entities by manually specifying the relationship.

Once these relationships are created, an Entity's relationship to Matters or to other Entities can be conveniently viewed from the Global Address Book Listing or the Matter Entity Listing. By viewing these relationships, you are able to perform a conflict-of-interest check. For instructions on viewing Entity Relationships and checking conflicts, see Viewing Entity Relationships: Checking Conflicts.

To relate an Entity to a Matter, see Meaning and Significance of Assignment.

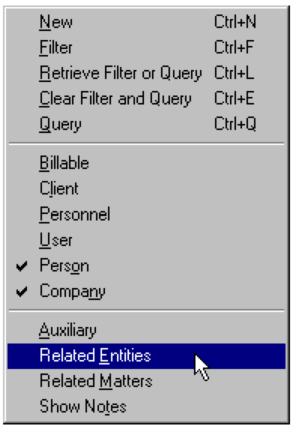
To relate an Entity to an organization, see Entity Type, Role, Name and Affiliation.

Manually Creating an Entity Relationship

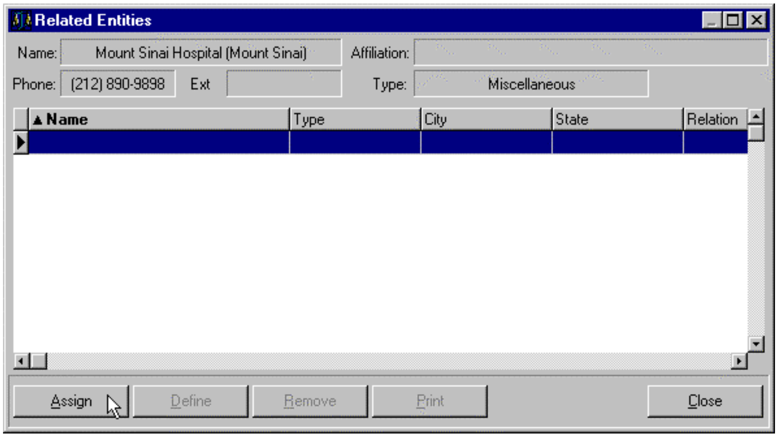
If you have properly assigned Entities to relevant Matters and entered an Entity's affiliation to an Organization, Practice Manager will automatically record the relationship, and it can be viewed from the Entity Listing. To supplement your ability to track all important relationships between Entities, Practice Manager allows you to create a relationship between one or more Entities based upon any criteria you specify. These manually created relationships can be viewed at the same time as you view relationships between an Entity and its parent or affiliated organization. To create a relationship manually:

From the Entity Listing

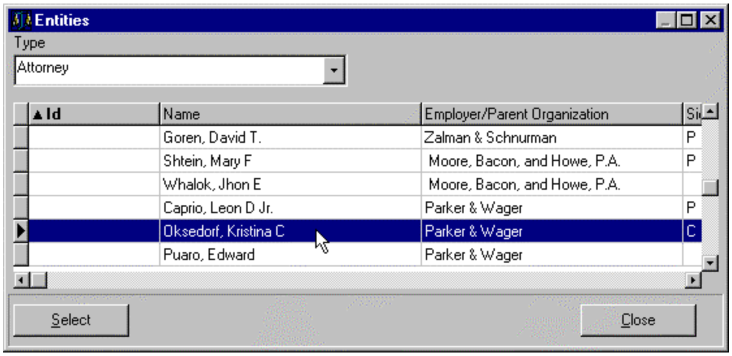
1. Display an Entity Listing, either the Global Entity Listing or the Matter Entity Listing, where the name of the Entity appears.
2. Locate the Entity record for the Entity to whom other Entities will be related and highlight it in the listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.
3. From the View Menu select **Related Entities**.



This will display the Related Entities list, showing any currently defined relationships for the Entity in question. If there are none, the list will be blank.



4 Click **Assign** from the Speedbar for the Related Entities list. A window will open displaying a list of all Entities contained in Practice Manager.

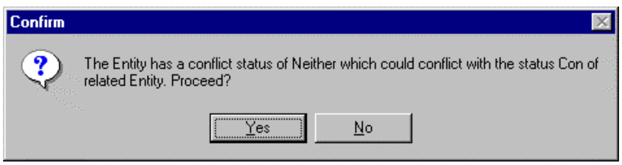


5 You can use the Entity Type dropdown to narrow your selection field to the correct Entity Type. The list of Entities will be filtered to include only the Entity Type you choose. To display the Entities of another Entity Type, simply select a different Type from the list.

6 When you have located the correct Entity, click the **Select** button to select the Entity.

Choose additional Entities in the same way.

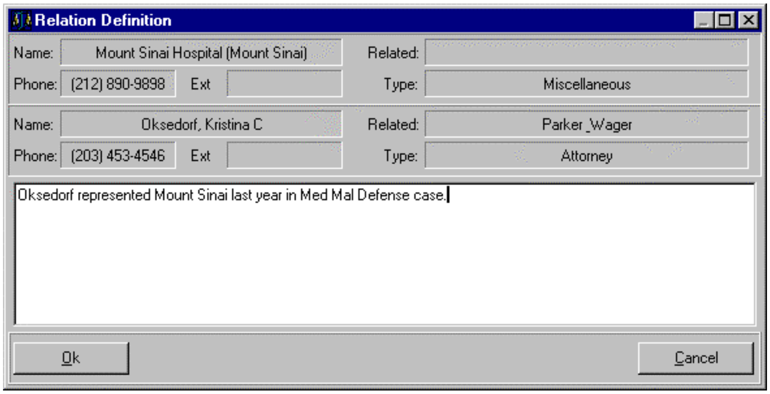
If there is a possible conflict you may get a message like this:



This message indicates that the conflict-of-interest status of the Entities being related may conflict with one another. Click **Yes** if you wish to proceed with the assignment. Click **No** if you do not wish to do so.

7 When you are done making selections, click the Close button. You will be returned to the Related Entities list.

8 To provide further information about the related Entity, click the Define button on the Relate Entities list. The Relation Definition screen will appear. In the blank field, you can provide additional information about the nature of the relationship between the Entities.



9 Click OK to save the information and close the Relation Definition screen or Cancel to close the screen without saving the information.

10 Click **Close** at the Related Entities list to close the screen.

From the Entity TreeView Tab

See Modifying and Removing Relationships in TreeView for detailed instructions.

To manually remove an assigned entity

To remove a manually assigned Entity relationship:

From the Entity Listing

1 Display the Related Entities list for the Entity in question by selecting **Related Entities** from the View Menu.

2 Highlight the Entity you wish to remove.

3 Click the **Remove** button on the Speedbar. The Entity relationship will be deleted.

4 Click on **Close** to close the Related Entities list.

From the Entity TreeView Tab

See Modifying and Removing Relationships in TreeView for detailed instructions.

To printing the list of entity relationships

To print the list of Entity Relationships for an Entity:

1 Display the Related Entities list for the Entity in question by selecting **Related Entities** from the View Menu.

2 Click the **Print** button on the Speedbar. A small menu will appear.

3 To print the Related Entities list to the screen, the printer or a file, follow the instructions in Printing Listings.

Viewing Entity Relationships: Checking Conflicts

An Entity is automatically related to any Matter in which the Entity is assigned a role and any organization entered in the Parent Organization field (for organizations) or Organization field (for individuals) of its Entity record. An Entity can also be related to other Entities by manually creating an Entity Relationship. Both Entity-to-Entity and an Entity-to-Matter relationships can be viewed in Practice Manager. To conduct a check for conflicts-of-interest, you can review the Entity and Matter relationships of your prospective Client and any Entity who might be involved in the proposed Matter in an adverse capacity. When you check an Entity’s relationships, Practice Manager gives you a list of all Matters in which the Entity has been involved and a list of all Entities to which the Entity has been related, either automatically or manually, in Practice Manager.

Viewing an Entity's Relationship to Matters

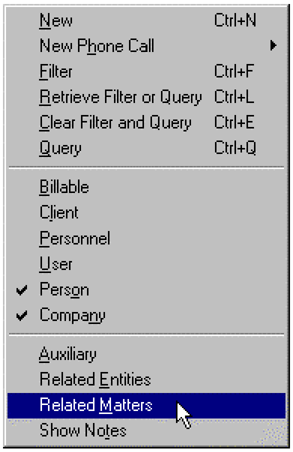
If an Entity has played a role in a Matter in any capacity, the Matter will appear on the Related Matters list. To view the list of Matters relating to an Entity:

From the Entity Listing

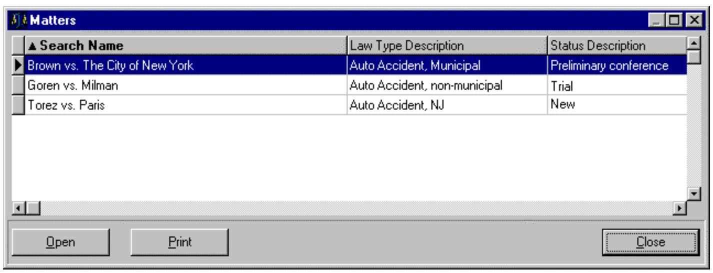
1 Display an Entity Listing, either the Global Address Book Listing or the Matter Entity Listing, where the name of the Entity appears.

2 Locate the Entity record for the Entity whose status you are checking. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.

3 From the View Menu select **Related Matters**.



A list of Matters in which the Entity has been involved will be displayed.



The list will disclose the Matter's Search Name and the Entity's role in the case. If you want to review the details of one of the listed Matters, highlight it and select the **Open** button or simply double-click on it.

From the Entity TreeView Tab

1 Display the Entity Listing. Locate the Entity record and highlight it in the listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.

2 Open the Entity record:

- Double-click the highlighted Entity record
- Strike “Ctrl + O”
- Click on Open in the Speedbar
- Select File and then Open and then select Selected Item from the Practice Manager Menu.

3 Click on the TreeView tab.

4 Open the list of Related Matters by

- Clicking the ⊞ to the left of Matters
- Double-clicking on the Matters heading.

The list of related Matters will appear. To view details on a matter, simply double-click on it.

Viewing an Entity’s Relationship to Other Entities

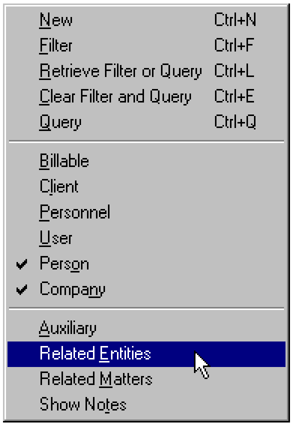
You can view an Entity’s relationships to other Entities on the Related Entities list. The Related Entities List includes any Entity which has been recorded in the Entity record as the Parent Organization or Organization of the primary Entity as well as any Entity which has been manually related to the primary Entity. To view the list of Entities relating to the primary Entity:

From the Entity Listing

1 Display an Entity Listing, either the Global Address Book Listing or the Matter Entity Listing, where the name of the Entity appears.

2 Locate the Entity record of the primary Entity. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.

3 From the View Menu select **Related Entities**.



The Related Entities list will appear. It includes any Entity that has a relationship to the primary Entity.

From the Entity TreeView Tab

1 Display the Entity Listing.

2 Locate the Entity record and highlight it in the listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Entity records displayed, see Filter the Entity Listing or use the QuickSearch Window to find the Entity record, see Searching the Entity Listing.

3 Open the Entity record:

- Double-click the highlighted Entity record
- Strike “Ctrl + O”
- Click on Open in the Speedbar
- Select **File** and then **Open** and then select **Selected Item** from the Practice Manager Menu.

4 Click on the TreeView tab.

5 Open the list of Related Entities by:

- Clicking the ⊞ to the left of Entities
- Double-clicking on the Entities heading.

The list of related Entities will appear. It includes any Entity that has a relationship to the primary Entity.

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Chapter

9

Understanding Documents

Overview of Documents

The Document module of Practice Manager gives you control over all documents relating to Matters.

In Practice Manager, a document is any written, recorded or graphic material, however produced, that relates in any way to Matters. This includes not only documents customarily generated by your office—correspondence, pleadings, contracts and estate planning documents—but also written and graphical information produced by any other Entity involved in a Matter, including documents generated by opposing counsel, exhibits, transcripts, photographs and tape or video recordings. Practice Manager distinguishes between documents on the basis of whether they are **Outgoing** or **Incoming.** **Outgoing** documents are documents that are generated by personnel in your office, using your word-processing or other software applications. **Incoming** documents are documents created by, or received from, any other Entity. Practice Manager allows you to keep track of all Incoming and Outgoing documents of significance to your Matters by recording a summary for each document in a Document Profile. Information entered in the fields of a Document Profile is summarized in the Document Listings. Like other modules of Practice Manager, there are two Document Listings; the **Global Document Listing** encompasses documents in all Matters and the **Matter Document Listing** is a Listing of documents in each specific Matter.

Summarizing Documents Using Document Profiles

Regardless of whether your office generates a document—Outgoing—or a document is received from or generated by any other Entity in a Matter—Incoming—it will be summarized in a Document Profile. A Document Profile will be presented automatically whenever you want to:

- **Create** a document using an application on your computer.
- **Scan** a document into Practice Manager.
- **Record or log** the receipt of a document.
- **Copy** a document created in Practice Manager.
- **Import** a document or fax attached to an email or residing in the WordPerfect File Manager or Windows Explorer, using “drag and drop”.

For each document, the Document Profile will include the:

- **Description.** As much text as you need to locate it on the Document Listing without having to open or view it.
- **Date** the document was created or revised.
- **Matter** for which the document is being generated.
- **Document Category** ("Correspondence", "Discovery Motions", “Pleadings”, etc)
- **Document Type** ("Retainer Letter", "Notice of Deposition”, “Interrogatories”, etc.)
- **Index.** The location on the network where the document is being stored.
- **Author** of the document.
- **Application** used to generate or scan the document.

Launching Document Applications

From Practice Manager, you will be able to launch all applications that are used to create, view, edit or scan the documents tracked in Document Profiles.

- **Creating Documents**. After you complete the Document Profile, Practice Manager will start your word-processor or other application you use to create documents or spreadsheets.
- **Document Assembly**. If you have implemented Practice Manager's document assembly features, you can automate the creation of a word-processing document, using the merge functions of Microsoft Word™, WordPerfect™ or HotDocs™ document assembly engine.
- **Scanning Documents**. If you wish to scan a document, Practice Manager will either automatically scan the document after it has been recorded in a Document Profile, or automatically open the Document Profile screen after you have scanned it.
- **Editing and Viewing Documents**. Any document created, scanned or imported into Practice Manager can be edited or viewed, using any software that can edit or view that type of documents. Thus, for instance, you can view an HTML document using a Web browser, or view a fax image using a fax viewer.

The Document Listing

Like other Listings, the Document Listing serves as the central point where all Document functions can be initiated. All documents profiled in Practice Manager are automatically organized by Document Category and Document Type. This allows you to filter and search for specific categories and types of documents.

Uses of the Document Listing

Practice Manager gives you control over all documents relating to your Matters--Outgoing as well as Incoming--and their associated Document Profiles, through the Document Listing. There are actually two Document Listings; the **Global Document Listing** encompasses documents in all Matters and the **Matter Document Listing** is a Listing of documents relative to a specific Matter. From the Document Listings, you can create, copy, view, edit and delete Outgoing and Incoming Documents and their Document Profiles. Information from the Document Profiles, including the name and location of the documents, is displayed on the Document Listings, which can be searched, sorted, filtered and printed like all other Listings in Practice Manager. From the Document Listings, you can:

- **Create New Outgoing Documents** using your word-processing program or other applications, and enter summary information on the Document Profile screen for the document. See Creating Outgoing Documents.
- **Scan Incoming Documents** into Practice Manager and enter summary information about each scanned document in a Document Profile. See Profiling Incoming Documents.
- **Log Documents.** You can create a Document Profile for an Incoming document, even if you are not scanning it into Practice Manager. You may also want to log Outgoing documents. See Using Document Profiles to Log Documents.
- **Copy an Existing Document**. By clicking on the **Copy** button, you can copy an existing Incoming or Outgoing document, together with the associated Document Profile. See Copying Documents Created in Practice Manager.
- **Change the Listing Layout.** You can change the order, number and size of the columns located on the Column Heading Bar of the Document Listing. See Changing the Document Listing Layout.
- **Search for a Particular Document.** Using the QuickSearch Window, you can search for a particular Document, its Description or other details recorded in its Document Profile. See Searching the Document Listing.
- **Conduct a Full Text Search.** Type a key word or phrase and the system will display all documents in which it occurs. The entire content of all

documents is searched and you are shown every instance of the text. See Searching for Text within Documents.

- **Filter the Document Listings.** Using QuickFilters, you can limit the Documents displayed to Incoming or Outgoing documents, documents created within a particular period of time or associated with a particular author. You can also create User-defined Filters and advanced Queries to display Documents according to any criteria you specify, such as all pleadings or correspondence or documents created by a particular staff person. See Filtering the Document Listing.

- **Printing Document Reports**. You can print the filtered and sorted Document List. See Printing The Document Listing.

Displaying the Document Listings

There are two Document Listings in Practice Manager -- the Global Document Listing and the Matter Document Listing.

Displaying the Global Document Listing

There are three ways to access the Global Document Listing:

- From the Practice Manager Menu

  Click on **File** in the Practice Manager Menu and select **Open** and then select **Documents**

- From the Toolbar

  Click on the Document Listing icon  on the Practice Manager Toolbar.

- Using a Keystroke

  Press the Shift + F8.

Accessing the Matter Document Listing

The Matter Document Listing is accessed from the **Document** tab after a Matter has been opened.

To access the Matter Document Listing:

1. Open an existing Matter.
2. Click on the **Documents** tab.

Changing the Document Listing Layout

The columns in the Document Listings are essentially fields from the Document Profile displayed in list format. The number, order and size of the columns can be modified to display the information you consider most important.

What Columns Should Be Displayed

Although any of the columns can be displayed, you will find certain fields more useful than others:

- **Description.** The description your firm has given to the document. If the description contains detailed information about the document, it can be used to help locate the document in the Listing using the QuickSearch window. See Searching the Document Listing.
- **Matter Name and Matter Number**. When you are viewing the Global Document Listing, rather than the Matter Document Listing, these fields will help you quickly identify the Matter to which the document is linked.
- **Date Profile**. The date the Document Profile was created.
- **Author Code.** The initials of the person who authored the document.
- **Creator Code.** The initials of the person who typed, created, or logged a document.
- **File Name and Path.** The path and file name where the document is located on your computer or network.

Adding, Removing, Ordering and Resizing Columns

You can add, remove, order and resize columns on the Document Listings, just like maneuvering in other Listings. To make these changes to the columns listed on the Column Heading Bar, you will access the Column Control Menu or drag the columns to the proper location and size. For detailed information on how to change the layout of Listings, see Listing Components and Controls and Customizing the Listing Layout.

Sorting Documents on the Document Listing

Documents can be sorted by any field displayed in the Document Profile, in ascending or descending order, alphabetically or numerically, depending upon the field. Normally, you will probably choose to sort Documents by Date Created or Description, but you can also sort by other fields. You select the Sort Field and change the sort order of the Document Listing, just like other Listings. See Sorting Listings.

Select the Sort Field and set the Sort Order

1 If the field you wish to sort by does not appear as a column heading on the Column Heading Bar, add the desired column to the Document Listing display. See Changing the Document Listing Layout and Customizing the Listing Layout.

2 Double-click on the column of the field in the Column Heading Bar to choose the field and sort it in ascending order, indicated by the ▲ symbol. To change to descending order, double-click again. The sort indicator will change to ▼.

   An alternate way to change the sort order*: Point to the column heading to be used for sorting, display the Column Control Menu by right-clicking, and choose "Ascending" or "Descending" from the menu.*

   The new sort order will remain in effect until you close the Document Listing.

3 To **Save** the selected sort options, right mouse click on the Column Heading Bar and select **Save Grid Layout** from the menu.

Searching the Document Listing

To view or copy a Document, or open a Document Profile, you must first be able to locate the Document on the Document Listing. The fastest way to locate a Document is to use the QuickSearch Window, available on all Listings. To search for a Document, you must determine which field will be used for the search and set it as the Sort Field. Normally, you will want to locate a Document by its description, and therefore, will use Description as the Sort Field. For more detailed information on searching Listings in global, see Searching for Records in Listings.

Using the QuickSearch Window

1. Limit the number of Documents displayed, if you want, using the QuickFilters, a User-defined Filter or Query. For instance, you could limit the Documents to those of which you are the author, or documents profiled in the last 90 days. See Filtering the Document Listing.

2. Choose the Sort Field for the search. See Sorting Documents on the Document Listing.

3. Type the first few characters of the first word or words you are trying to match. For instance, if you are searching for "Plaintiff's Motion to Dismiss"--the Description you entered in the Description field of the Document Profile--you might enter "Plaintiff's Motion".

   As you type, the QuickSearch Window will open, displaying the characters you have entered. All Documents whose Description begins with the characters you have entered will be displayed in the Document Listing.

4. To search for Documents **containing** particular characters, place the wildcard character “*” (an asterisk) before the search string. Thus, in the foregoing example, typing "*Dismiss" would display the document being sought.

5. To clear the QuickSearch window for a new search,

   - Delete the characters in the QuickSearch Window
   - Hit the Esc key on your keyboard
   - Double-click on another column heading in the Document Listing.

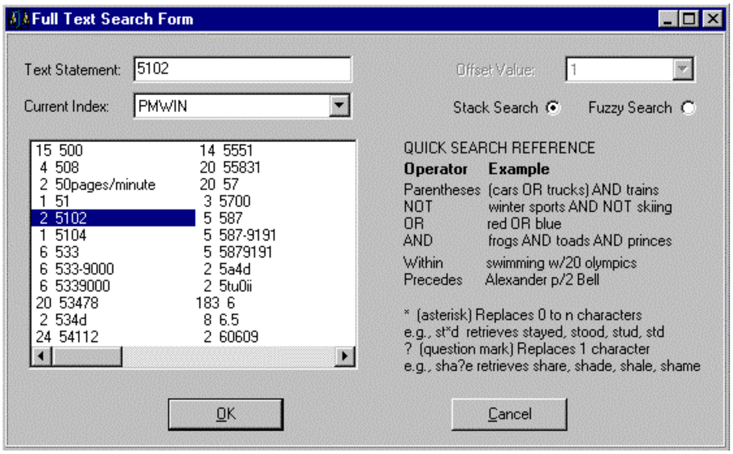
Search For Text within Documents

If the optional Document Indexing integration has been installed in your office, Practice Manager will automatically index the content of your word-processing documents. This means that you can search for a word or phrase to be found anywhere – within any document. The system quickly displays all documents containing your phrase and allows you to continue the search within each document as well.

To Search for a word or phrase:

1. Go to the Global Document Listing Screen. (You can also access the Text Filter from the Matter Document Listing, but be aware that activating the filter from there includes in the text search only documents related to that matter.)
2. Access the Filter Creation Screen by selecting
   - **View** and then select **Filter** from the Practice Manager Menu
   - **Filter** from the right-mouse click menu on the listing
   - The Filter icon  on the Practice Manager toolbar

   The Filter Creation Dialog appears.
3. Select the Text Filter button at the bottom of the Dialog box.
4. The Text Filter Dialog appears. Type the word or phrase you are searching for in the **Text Statement** box. Your selection will appear highlighted in the list below with the number of instances found to the left of it. Note that you can use wildcard characters and query combinations here.



Select the **OK** button.

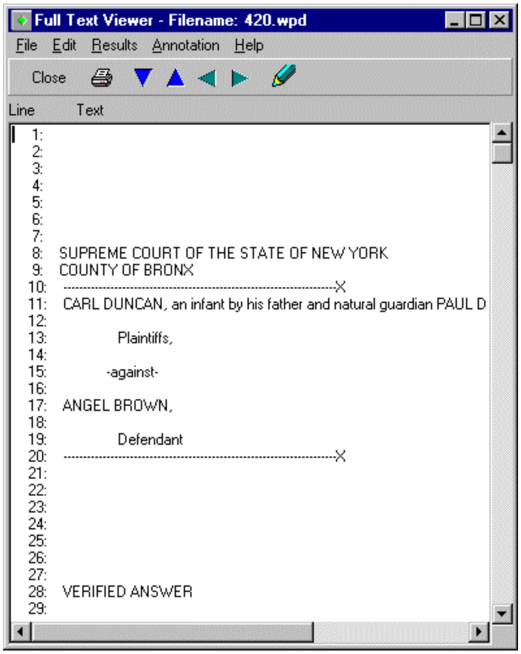
5 You will be returned to the Filter Creation Dialog box. Select the **Apply** button, and the listing will display only documents that contain the word or phrase you specified.

To continue the search within a document:

1 Highlight the document you wish to search through and right-mouse click on it.

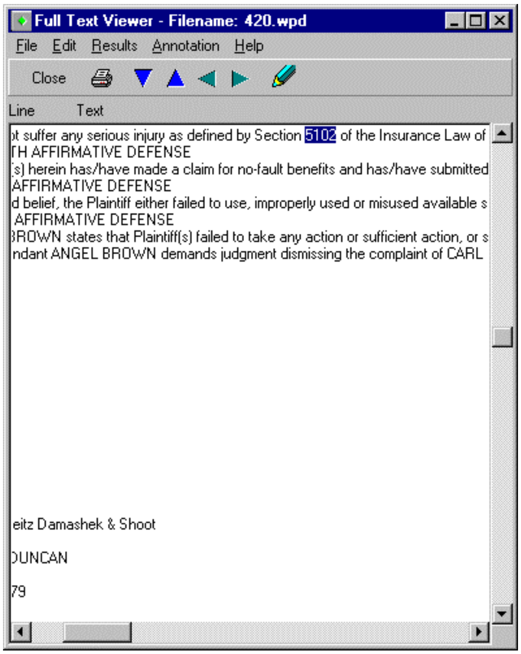
2 From the menu that appears, select Text View.

3 The document will open in Text View



4

5 Click the Next Hit button , and you will be taken to the next instance of the text you are searching for:

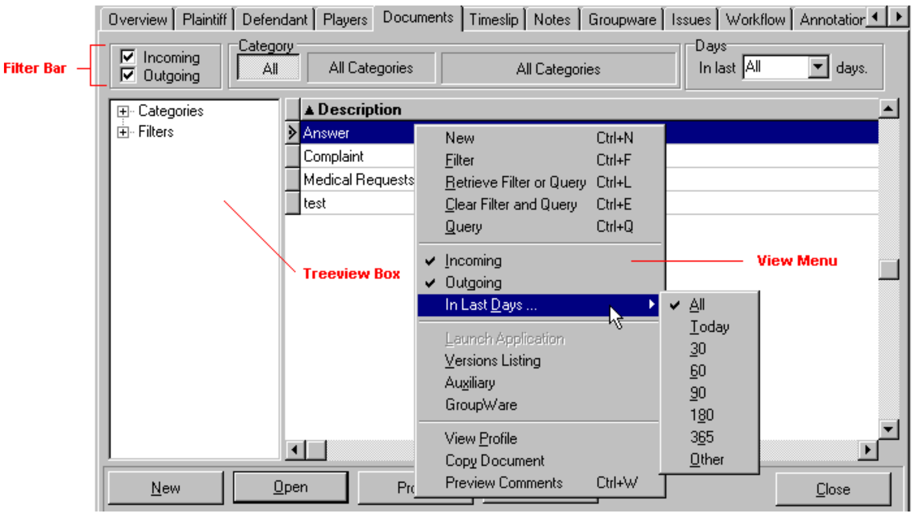


Filtering the Matter Document Listing

You can limit the number of Documents displayed in the Document Listings using QuickFilters, User-defined Filters or Queries. In User Preferences, you can set an option that automatically activates a specific Filter or Query each time you open a Document Listing, or utilize another option that presents the list of available Filters and Queries. See Setting Filter Options for Listings.

QuickFilters

Select QuickFilters from the Filter Bar or View Menu to limit the records displayed. For detailed information on QuickFilters and the use of Filter controls, see Using QuickFilters and Listing Components and Controls.



Selecting:

- **Incoming:** Displays all Documents created or received from any Entity not connected with your office.

- **Outgoing:** Displays all Documents created by any staff person in your office.

- **Category:** (Available only as a Quickfilter in Matter Document Listing or under Matter Treeview.) Displays Documents assigned to a particular Document Category.

- **In last. . . days:** Displays all Documents recorded in a Document Profile within the stated period of days.

- **Versions Listing**: Displays a listing of the various versions of a document. The listing includes the creation date, revision date, a document description, the file name and version date. It also identifies the creator and revisor of the document.

User-defined Filters and Queries

You can create, save and retrieve Filters and Queries, based upon one or a combination of several fields included in a Document Profile. For detailed information on using User-Defined Filters and Queries, see Creating Filters to Select Records and Using Queries to Filter Listings. Filters and Queries can be saved and used to create several types of useful Document Lists that can be printed for various purposes. For instance, you can create lists containing all pleadings, all correspondence, all closing documents or all documents generated by a particular staff person. You can also filter for all evidentiary material and then sort it by date or author. Some of the more useful fields that you can use in Filters or Queries include:

- **Document Category.** Use one or more Document Categories to create a list of correspondence, all motions, closing documents, all discovery or all pleadings.

- **Document Type**. Use Document Type to filter for all motions of a particular type, all interrogatories, or all correspondence with your Client.

- **Author**. Use Author to create a list of all documents in a Matter produced by a particular attorney or staff person.

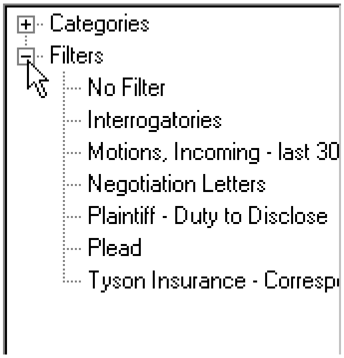
- **Creator**. Use Creator to filter for Documents produced or logged by a particular staff person.

- **Application**. Use Application to limit the list of Documents to those created using a single application, such as all documents created using your word-processing software.

- **Date From** and **Date To**. Use these fields to restrict the documents to a range of dates.

Retrieving a Saved Filter from the Treeview Box

In addition to other Filter options discussed above, the Document Listing includes a convenient Filter retrieval feature in the Treeview box on the left side of the Listing Screen.



Displayed in Windows Explorer-like format, the Treeview Filter options allows you to view saved filters at a glance and make a selection from the list. For details, see Applying Filters from the Listing Treeview Box.

As illustrated above, the Matter Document Listing Treeview box also includes easy access to Categories as well as saved Filters.

Editing or Viewing a Document

Both Incoming and Outgoing Documents can be viewed and edited in the applications used to create them.

Access the document from the Document Listing

1. Display either the Document Listing or the Matter Document Listing. See Displaying the Document Listings.
2. Locate and highlight the Document in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Documents displayed, see Filtering the Document Listing, or use the QuickSearch Window to find the Document, see Searching the Document Listing.

3 Click on **Open** or double-click on the highlighted document. If you have activated the Preference **Open profile first when opening document**, the Document Profile will open first when you double-click the highlighted entry in the Document Listing. To open the document, click on the **Open Document** button in the Document Profile. See Setting Other Preferences.

Edit and Save the Document

Edit the document as you wish and save it in the manner specified by the application in which it was created. To return to Practice Manager, click on the Practice Manager icon in the Windows Taskbar. You will be returned to Document Profile or to the Document Listing. If necessary, close the Document Profile by clicking on **Save Profile.**

Deleting a Document

If you wish to delete a document, whether Outgoing or Incoming, it must be done from one of the Document Listings—either the Global Document Listing or the Matter Document Listing. When you delete a document, the Document Profile for the document is also deleted.

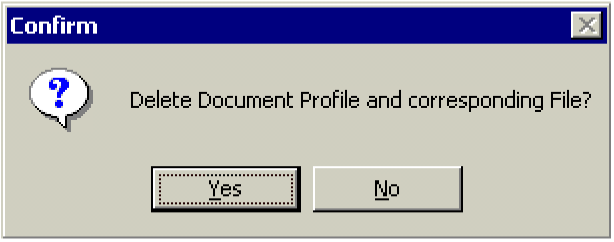
1 Display either the Global Document Listing or the Matter Document Listing. See Displaying the Document Listing.

2 Locate and highlight the Document in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Documents displayed, see Filtering the Document Listing or use the QuickSearch Window to find the Document, see Searching the Document Listing.

3 To delete the document,

- Select **File** and then select **Delete** from the Practice Manager Menu
- Hit Ctrl + D.

A dialog asking for confirmation of the deletion will appear:



- Select **Yes** to delete the document and its Document Profile.
- Select **No** to cancel the deletion.

Printing the Document Listing

The Document Listings can be used to create a wide variety of useful reference lists and reports concerning the documents being generated and tracked in Practice Manager. To begin with, Document Listings can be sorted and filtered according to a variety of different criteria. For instance, you can find all documents relating to a particular matter, or certain categories or types of documents in a Matter, such as correspondence, discovery, pleadings, trial exhibits, documentary evidence or trial and deposition transcripts. Isolate all documents generated by a particular attorney or staff person; or certain categories or types of documents for all Matters, such as summary judgment motions, discovery pleadings, briefs or form documents. Document Listings can be printed or saved either as a Practice Manager report file or as an exportable text file that can be edited in your word processor.

Procedure for Creating Listing Reports and Schedules

To create a Document Listing Report:

1. **Select Records.** Use a QuickFilter, User-defined Filter or Query to select the Documents that will comprise the report or list. See Filtering the Document Listing.

2. **Create a Layout.** Modify the columns in the Document Listing layout to display the fields you want to be included in the list. See Changing the Document Listing Layout.

3 **Sort the Records.** Choose the field to be used to sort the records and sort them in ascending or descending order. See Sorting Documents on the Document Listing.

4 **Print the Report.** You will be able to name the report and print it to the screen, the printer or a file. For detailed information on printing Listings, see Printing Listings.

Profiling Documents

What Types of Documents Are Profiled?

The Document Profile is a summary of information about a document. In Practice Manager, a Document Profile is used to make a record of any document that has a bearing on a Matter, regardless of whether it was produced by your office or stored on your computer network. The Profile will allow you to filter and search for documents when and as you need them. Using Practice Manager, you will complete a profile whenever you:

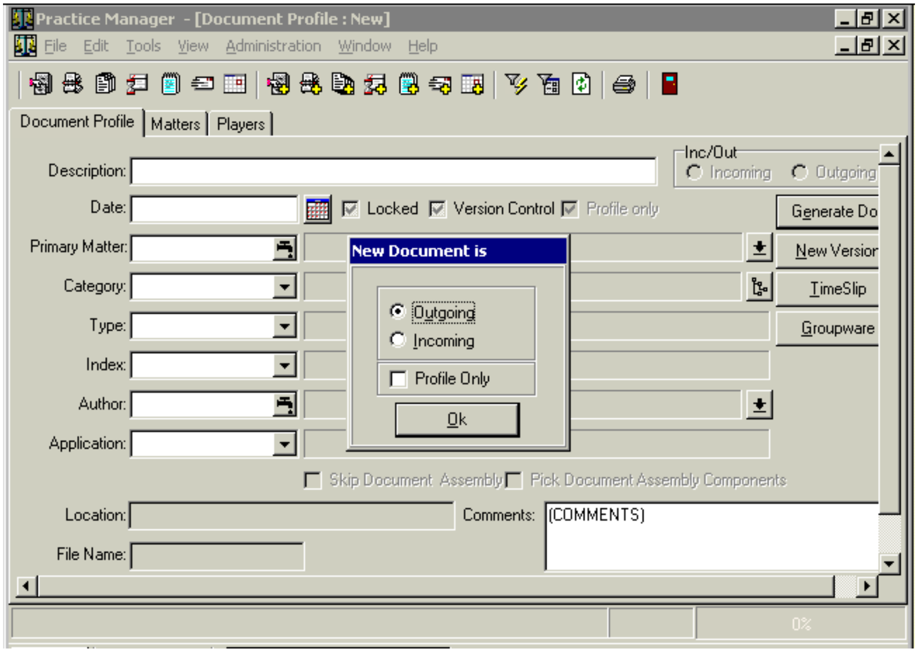
- Create or Copy an Outgoing Document. Any time you create or copy a matter related document in any software application, you will complete a Document Profile. Whenever a document is created in your office, even if you drag and drop a document from the WordPerfect File Manager or Windows Explorer, it should be profiled as an Outgoing Document. To fill out a Document Profile for Outgoing Documents, see Profiling Outgoing Documents.

- Scan or Drag and Drop Incoming Documents. Incoming documents are those received from other parties — pleadings, correspondence or evidentiary material — and can be scanned into your computer or network server through Practice Manager. Documents, images or faxes created outside of your office and imported into Practice Managerby using drag and drop should be profiled as Incoming Documents. To fill out a Document Profile for Incoming Documents, see Profiling Incoming Documents.

- Logging Incoming Documents. Even if you do not want to scan Incoming documents, you can still create a Document Profile for documents you want to “log" for a Matter. To fill out a Document Profile for a document you want to log in, see Using Document Profiles to Log Documents.

Profiling Outgoing Documents

Any document you create, copy or import into Practice Manager using drag and drop, should be profiled as an "Outgoing" Document, if it was generated by your office. It doesn't matter what software application it was created with; use WordPerfect, Word or any other. When you profile an Outgoing Document, you will be requested to fill out the fields of the Document Profile.



- **Outgoing/Incoming.** When you begin the process of profiling a document, the **New Document is** dialog will appear as pictured above. Make sure that “Outgoing” is selected.

- Description. A complete description of the document. Make sure your description is complete enough so that other Users can identify the content of the document without opening it. Try to use words that will enable you to locate the document using the QuickSearch Window. For instance, rather than "Motion", use "Plaintiff's Motion to Dismiss". Rather than Letter to Client, use "Letter to Client Enclosing Settlement Check."

- Date. The date the Document Profile was created. Today's date will be inserted automatically. If you wish to change it, type in the date manually, or select it from the date control .

- Matter Name. If you are completing a Document Profile from the Matter Document Listing, the Matter Name will be inserted automatically. If you are completing it from the Global Document Listing, you will have to select a matter. If you know the Matter Number, or the beginning of it, you can type characters in the search window to the left of the Lookup Filter Control . This will automatically display a list of Matters beginning with the characters you have typed. Clicking on the Lookup Listing control will display the Matter Listing, where you can search for the Matter using the QuickSearch Window. For instructions on searching for a specific Matter, see Searching the Matter Listing.

- Category. Select a Document Category from the Category Listing displayed when you click on the list button to the right of the field. This list is dependent upon the Law Type of the selected Matter. Likewise, the Document Category you choose here will limit the available Document Types available in the next field below. If you know the Document Category Code, you can simply type this in the field or you can use the TreeView button to the right of the Category field to select Category and Type simultaneously (see below).

- Type. Select a Document Type from the Type Listing displayed when you click on the list button to the right of the field. This list is dependent upon the Law Type of the selected Matter as well as the Document Category you have chosen.

  Note: *The Document Type you choose may determine whether the document will be assembled automatically using Document Components or HotDocs. Therefore, it is important to select the correct Document Category and Document Type. See* *Document Assembly: Step-by-Step*.

- **TreeView Button.** Once a matter has been selected, the TreeView button will be active. You can use it to select Document Category and Type simultaneously. It is also useful, in that it allows you to view the organization of Document Categories and Types at a glance. Prior to selecting a Category, select the **TreeView** button. A graphical tiered view of Categories and their respective Types (those belonging to the Law Type of the matter) will display. This dialog functions like other tree view screens in the program: To see selections beneath an entry, click the ⊞ to the left of it. It will change to a ⊟ and the list will display. Double-click on a selection and the Category and Type fields will be completed accordingly.

- Index. The Index is the location on your Network where the document will be stored. The Index will normally be selected automatically by default. If you wish to change the location of the Document, click on the list button and select an alternate Index from the list.

  Note: *Changing the Document Index could greatly limit access to a document. Consult your Practice Manager Administrator before using a different Index from the default.*

- **Author**. Select an Author for the Document. For Outgoing documents, only the list of Staff assigned to the Matter will be displayed in the listing. If you know the login initials of the Author, you can type the initials in the search window to the left of the Lookup Filter Control . This will automatically display a list of available staff beginning with the characters you have typed. Or simply select the Lookup Filter button and select from the list. Clicking on the Lookup Listing control will display a Listing of all entities, within which you can search using the QuickSearch Window

- **Application**. Here you will select the software program used to create the Document. By default, your word-processing program will be chosen automatically. If you are not creating a word-processing document, select the correct application from the list displayed when you click on the list button .

- **Document Assembly Options**. If the Document Type has been assigned Document Components, it will automatically assemble the Document for you when you click the **Open Document** button.

  - If you want to disable document assembly for the document, click on **Skip Assembly**.

  - If you want to assign a new Document Component to the document, click on **Pick Document Assembly Components** (first ensure that "Skip Document Assembly" is not checked).

- **Generate Doc.** If you are creating a document, **Generate Doc** will start the process of creating the document. If the Document Profile was created in connection with copying or importing a document, this button will be labeled **Open Document** and will open the document for viewing and editing.

- **Save Profile.** The **Save Profile** button saves the Profile Information.

- **Other Functions.** For Outgoing documents, other functions can be initiated from the Document Profile Screen. You can:

Create a new version of the document by utilizing the **New Version** and **Versions** buttons. See Using Version Control for details.

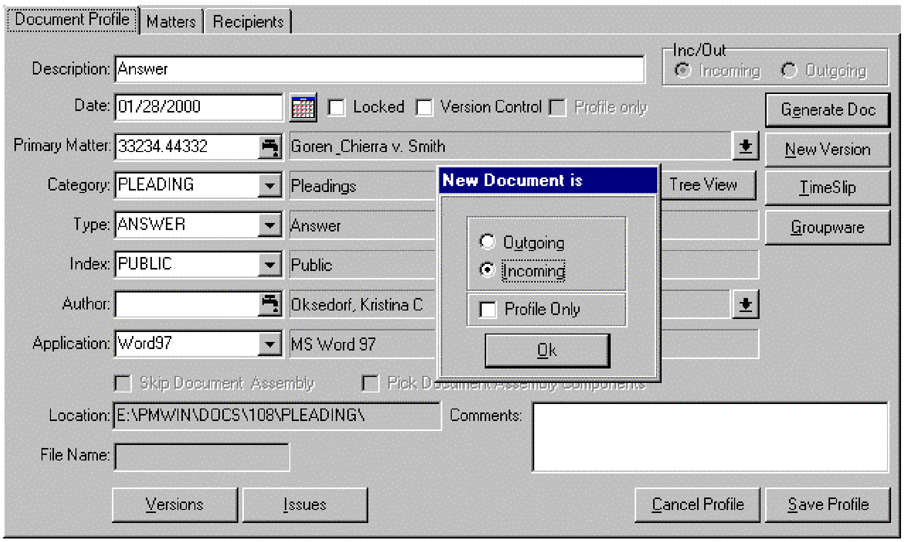
Assign one or more issues to the document by selecting the **Issues** button. See Assigning Issues to Documents.

Generate a timeslip to bill your Client for the document by clicking the **Timeslip** button on the right side of the Profile. See Creating a New Timeslip.

Select the **GroupWare** button on the right side of the Profile to transmit the document via e-mail, or generate a GroupWare Item in connection with the creation of the document, see Attaching a Document to a GroupWare Item.

Profiling Incoming Documents

Any document you scan, copy or import into Practice Manager using drag and drop, should be profiled as an "Incoming" Document, if it was generated by opposing counsel, a third-party or some other Entity outside of your office. When you profile an Incoming Document, you will be requested to fill out the fields of the Document Profile.



- **Outgoing/Incoming.** When you begin the process of profiling a document, the **New Document is** dialog will appear as pictured above. Make sure that “Incoming” is selected.

- Description. A complete description of the document. Make sure your description is complete enough so that other Users can identify the content of the document without opening it. Try to use words that will enable you to locate the document using the QuickSearch Window. For instance, rather than "Motion", use "Defendant's Motion for Non-Suit".

- Date. The date the document profile was created. Today's date will be inserted automatically. If you wish to change it, type in the date manually, or select it from the date control .

- Matter Name. If you are completing a Document Profile from the Matter Document Listing, the Matter Name will be inserted automatically. If you are completing a Document Profile from the Global Document Listing, you will have to select a matter. If you know the Matter Number, or the beginning of it, you can type characters in the search window to the left of the Lookup Filter Control . This will automatically display a list of Matters beginning with the characters you have typed. Clicking on the Lookup Listing control will display the Matter Listing, where you can search for the Matter using the QuickSearch Window. For instructions on searching for a specific Matter, see Searching the Matter Listing.

- Category. Select a Document Category from the Category Listing displayed when you click on the list button to the right of the field. This list is dependent upon the Law Type of the selected Matter. Likewise, the Document Category you choose here will limit the available Document Types available in the next field below. If you know the Document Category Code, you can simply type this in the field or you can use the TreeView button to the right of the Category field to select Category and Type simultaneously (see below).

- Type. Select a Document Type from the Type list displayed when you click on the list button to the right of the field. This list is dependent upon the Law Type of the selected Matter as well as the Document Category you have chosen.

- TreeView button. Once a matter has been selected, the TreeView button will be active. You can use it to select Document Category and Type simultaneously. It is also useful, in that it allows you to view the organization of Document Categories and Types at a glance. Prior to selecting a Category, select the TreeView button. A graphical tiered view of Categories and their respective Types (those belonging to the

Law Type of the matter) appears. This dialog functions like other tree view screens in the program: To see selections beneath an entry, click the ⊞ to the left of it. It will change to a ⊟ and the list appears. Double-click on a selection and the Category and Type fields will be completed accordingly.

- Index. The Index is the location on your Network where the document will be stored. The Index will normally be selected automatically by default. If you wish to change the location of the Document, click on the list button and select an alternate Index from the list.

- Author. Select an Author for the Document. For Incoming Documents, all Entities assigned to the Matter will be displayed in the listing. You can type characters in the search window to the left of the Lookup Filter Control. This will automatically display a list of entities beginning with the characters you have typed. Clicking on the Lookup Listing control will display the assigned Entity Listing, where you can search using the QuickSearch Window.

- Application. The Application is the software program that will be used to view and edit the Document. By default, your scanning software normally will be chosen automatically. If this is not correct, choose the application that can read the type of document in question. For instance, if you have imported a fax or a word-processing document, choose the applicable word-processor or fax viewer from the list displayed when you click on the list button.

- Generate Document. Clicking on Generate Document will open the document for viewing and editing.

- Save Profile. Click Save Profile to save and close the Document Profile. Click Cancel to close the Document Profile without saving it.

Other Functions. For Incoming documents, other functions can be initiated from the Document Profile Screen. You can:

- Select the **Issue** button to assign one or more issues to the document, see Assigning Issues to Documents.

- Annotate a scanned document for trial purposes, see Adding an Annotation to a Scanned Document.

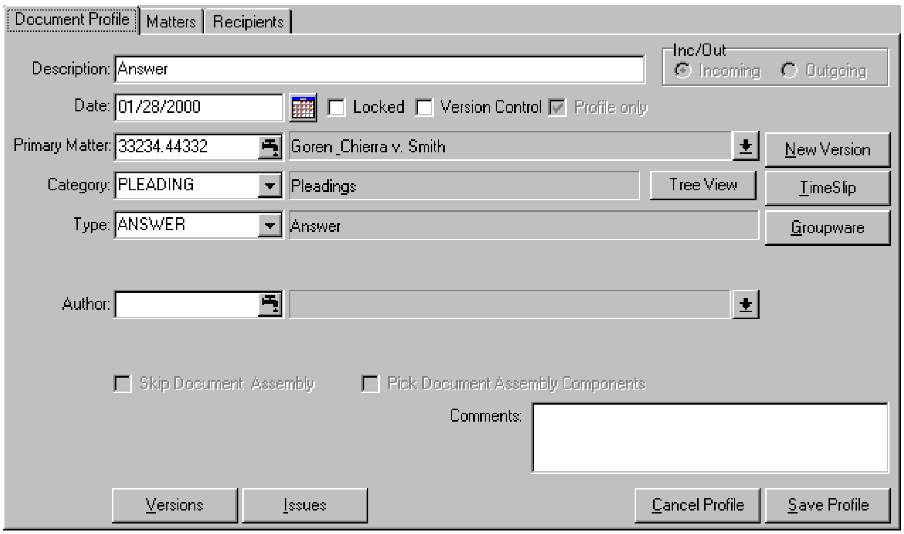
- Click on the **Timeslip** button and generate a timeslip to bill your Client for the document, see Creating a New Timeslip.

- Select the **GroupWare** button to transmit the document via e-mail, or generate a GroupWare Item in connection with the creation of the document, see Attaching a Document to a GroupWare Item.

Using Document Profiles to Log Documents

A Document Profile can be used to make a record of a document in a Matter, even if you do not intend to store the document on your computer or network. To log a document in this way, initiate the process of creating an incoming document as you normally would. When the **New Document is** dialog appears, make sure to check the **Profile Only** checkbox.

After you click OK, the profile will appear for you to complete. You will note that it does not include fields that normally contain document file information.



For details on completing the Profile screen, see Profiling Incoming Documents. When you have finished, click **Save Profile**. Practice Manager will record the document information, but will not create a document file. The log of this document will appear in the Document Listing for later reference.

Using a Document Auxiliary

Using FormDesigner, your Practice Manager Administrator can create a Document Auxiliary, containing additional data-entry fields, that will appear as an additional tabbed screen in the Document Profile for Incoming or Outgoing documents. A Document Auxiliary is used to supplement the data-entry fields contained in a Document Profile. For instance, a Document Auxiliary could be used to record the mode of delivery of correspondence or pleadings or to enter information about the document itself, such as the recipients of the document. The information entered in the fields of a Document Auxiliary can be merged into word-processing documents during automated document assembly.

A Document Auxiliary will have its own tab, appropriately labeled and located next to the **Matters** tab on the Document Profile screen. A Document Auxiliary screen can contain several "pages", each accessed by its own tab.

To enter information in a Document Auxiliary screen:

1. Display either the Global Document Listing or the Matter Document Listing. See Displaying the Document Listing.
2. Locate and highlight the Document in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Documents displayed, see Filtering the Document Listing, or use the QuickSearch Window to find the Document, see Searching the Document Listing.
3. Select the Profile button at the bottom of the listing. The Document Profile for the document appears.
4. Click on the Auxiliary tab.
5. If the Document Auxiliary has multiple tabs, click on the tab of the screen where you want to enter information.
6. Enter information in the Document Auxiliary in exactly the same way you enter information in the fields in any other screen in Practice

Manager. The information in the Document Auxiliary screens will be saved automatically when you close the Profile.

7 To access other information on the Document Profile, click on the Document Profile tab.

8 To save and close the Document Auxiliary, click the Close button on the Speedbar of the Document Auxiliary. The Document Profile will also close.

Viewing, Modifying or Deleting a Document Profile

You will access Document Profile from the Global Document Listing or the Matter Document Listing and can then view or modify it. The Document Profile is deleted when you delete the document. See Deleting a Document.

View or Modify a Document Profile

1 Display either the Global Document Listing or the Matter Document Listing. See Displaying the Document Listings.

2 Locate and highlight the Document in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Documents displayed, see Filtering the Document Listing, or use the QuickSearch Window to find the Document, see Searching the Document Listing.

3 Click on **Profile**. The Document Profile for the document appears.

4 After making any changes that are necessary, click **Save Profile** to save the changes and close the Document Profile.

Creating Documents

Creating Outgoing Documents

Outgoing Documents are those generated by someone in your office, using your word-processor or any other software application and stored in Practice Manager. Whenever you create an Outgoing Document, Practice Manager automatically opens the Document Profile screen, which you are required to complete before the document can be created. Then Practice Manager uses your word-processing software, either Microsoft Word or Corel WordPerfect to create the outgoing document. If your firm has implemented Practice Manager's document assembly features and assigned automated document components to the Document Type you are creating in your word-processor, you can choose to assemble word-processing documents automatically at the time you fill out the Document Profile. Once you create a new Document, you can:

- Create multiple versions of the document, see Using Version Control.
- Assign one or more issues to the document, see Assigning Issues to Documents.
- Generate a timeslip to bill your Client for the document, see Creating a New Timeslip.
- Transmit the document via e-mail, or generate a Workflow Item in connection with the creation of the document, see Attaching a Document to a GroupWare Item.

Start the Process of Creating a New Document

From the Matter Document Listing

5 Open an existing Matter.

6 Click on the Documents tab to open the Document Matter Listing.

7 Click the **New** button on the Speedbar.

From the Global Document Listing

8 Display the Global Document Listing. See Displaying the Document Listings.

9 Click the **New** button on the Speedbar.

Using a shortcut

You can start a new Document from anywhere in Practice Manager by using a shortcut.

- **Toolbar icon.** Click the New Document icon .
- **Menu selection.** Select **File** and then select **New** and then select **Document** from the Practice Manager Menu.
- **Shortcut Keystroke.** Hit Shift + F8.

Copy an existing Document

You can create a document by copying an existing document. See Copying Documents.

Whichever method you use to start the process, Practice Manager will display the Document Profile screen, or, if activated—a list of document templates.

Using a Document Profile Template

After you start a new Document, if you have elected to use Document Profile Templates, the Document Profile Template Listing will be displayed. A Template can automatically fill in certain of the fields in the Profile, partially or completely. If you want to use a Template, select one from the list. See Using Templates When Creating Records. You can also view, edit or modify an existing Template or create a new Template from the Template Listing.

Complete the Document Profile for the New Document

To complete the Document Profile, follow the instructions in Profiling Outgoing Documents.

Keep in mind the following when completing the Document Profile:

- **Accept Default Settings.** If you are creating a word-processing document, you will be able to accept the default selections for the Date, Index and Application fields in the Document Profile.
- **Document Description.** Keep in mind that the Description may be used in document assembly in the Reference Line, Title or Certificate of Service.

- **Document Category and Document Type.** If you intend to use document assembly, make sure you choose the correct Document Category and Document Type. Document assembly is linked to the Document Type you have chosen. See How Document Assembly Works.

- **Author.** For pleadings and correspondence, this is the person who will be signing the document. For documents to be signed by others, you can select the responsible attorney.

- **Document Auxiliary.** If your firm has installed a Document Auxiliary screen for the Document Profile, you should complete it before creating the documents. See Using a Document Auxiliary.

Create the Document

To create the Document:

Click the **Generate Doc** button. This will start your word-processor or other application. If you have selected an automated Document Type or chosen a Document Assembly Component, a completed or nearly completed document will appear. To complete an automated document, follow the instructions in Document Assembly: Step-by-Step. Edit the document as you wish and save it in the manner specified by the application.

To return to Practice Manager

Click on the Practice Manager icon in the Windows Taskbar. You will be returned to Document Profile. At this point, you may make any changes you want to the Document Profile and initiate any of the functions set forth above.

To save and close the Document Profile

Click on **Save Profile**. The Document Profile will be saved and you will be returned to the Document Listing.

Copying Documents

Another way of creating a document is to copy an existing document. Practice Manager offers several different ways to copy a document. See Strategies for Copying Documents. Whenever you create a new document based upon an existing document, you will also create a new Document Profile. If you copy a document that already has a Document Profile, most of the fields in the Document Profile will already be completed and you can modify the remaining fields as necessary.

Working with Scanned Documents and Images

Practice Manager treats images, including Web Pages and scanned documents, just like any other documents. Like other documents, images are managed in Practice Manager by recording them in a Document Profile. Most images should be profiled as “Incoming Documents”, because they are created or generated by an Entity outside of your office. However, images or scanned documents generated by your staff should be profiled as “Outgoing Documents”. For the most part, you will manage Incoming Documents by scanning them into Practice Manager and recording them in a Document Profile. Practice Manager offers seamless and slightly different integrations with two configurations of scanners: (1) those that are compatible with the Paperport scanning application offered by Visioneer and (2) those that utilize a Kofax Scanning Engine. If the document being scanned consists primarily of text, the scanned documents can be transformed into a Word-processing document using Xerox’s Textbridge or other Optical Character Recognition (OCR) software.

Documents scanned into Practice Manager are frequently used as evidence in litigation. If your office has purchased Practice Manager’s FormDesigner, you can create and attach Annotations to scanned documents. Document Annotations can be used to assign Issues to evidentiary documents. Issues assigned to scanned documents using Document Annotations can be included in Practice Manager Filters and Queries, allowing you to create filtered lists of Document Annotations, showing the documents that relate to critical Issues in litigation Matters. Scanned documents included in Documents Annotations can be viewed directly from the Annotations Listing.

» For instructions on profiling scanned documents as Incoming Documents, see Profiling Incoming Documents.

» For instructions on scanning documents using Paperport-compatible scanners, see Scanning a Document Using Paperport.

» For instructions on scanning documents using a Kofax-based scanner, see Scanning Using Kofax-based Scanners.

Once you have profiled a scanned document or image, you can

» Assign one or more issues to the document from the Document Profile, see Assigning Issues to Documents.

» Generate a Timeslip to bill your Client for the document, see Creating a New Timeslip.

» Transmit the document via E-mail, or generate a GroupWare Item in connection with the creation of the document, see Attaching a Document to a GroupWare Item.

Scanning a Document Using Paperport

Practice Manager offers seamless integration with Paperport scanners, or scanners that can utilize the Paperport software developed by Visioneer. After you scan a document using a Paperport or Paperport-compatible scanner, Practice Manager will automatically create a Document Profile for the scanned document.

Note: *If you are not sure whether your scanner is Paperport-compatible, you should consult your Practice Manager Administrator.*

Scanning a Document Using Paperport Software

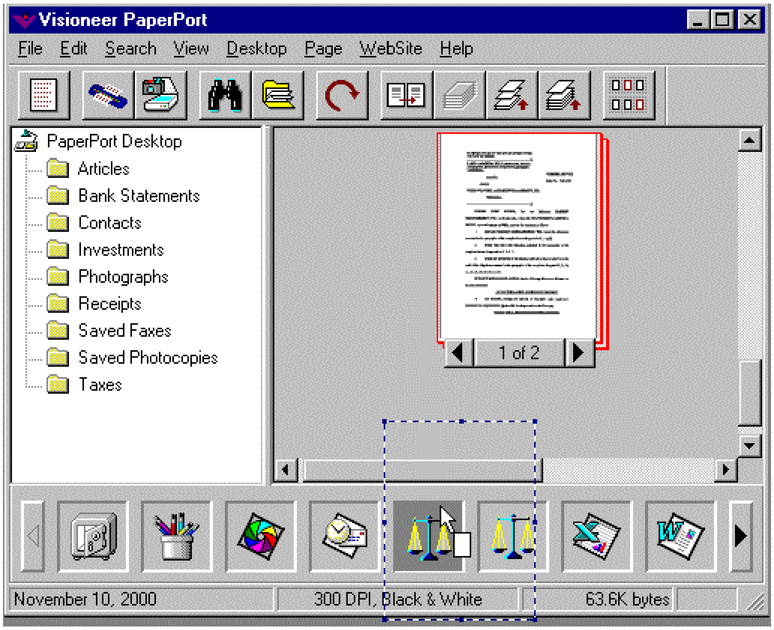
1 Scan the document into your scanner.

- If you have Paperport scanner, scanning will begin automatically as soon as you place a document in the scanner.
- If you do not have a Paperport scanner, start the Paperport scanning software and then follow the manufacturer's instructions for scanning a document.

If you have scanned the document correctly, the scanned image will appear on the Paperport desktop.

2 Click on the document image on the Paperport desktop and, while continuing to depress the Mouse Button, drag the document image in the direction of the Practice Manager Paperport icon. 

As you drag the image, you will see the outline of the document, surrounding a small rectangle with an attached arrow, move across the Paperport desktop. When the small rectangle is positioned over the Practice Manager Paperport icon, release the Mouse Button.



Practice Manager will become active and open a Document Profile.

3 Complete the Document Profile as described in Profiling Incoming Documents.

4 To save and close the Document Profile, click on Save Profile.

5 To view the scanned image, click on **Open Document**. The Practice Manager ImageViewer will open, enabling you to view the document.

Scanning Using Kofax-based Scanners

If your organization purchased the optional Practice ManagerWin Tiffview software, Practice Manager can also manage documents scanned into Practice Manager using a scanner that utilizes the Kofax Scanning Engine. Unlike scanning with Paperport software, you will fill out a Document Profile for the document before it is scanned, rather than afterwards. When you click **Open Document** in the Document Profile, the scanner will activate and scan the document.

Start a New Document Profile

Start a new Document Profile in the same way as you start one for an Outgoing Document.

From the Matter Document Listing

1. Open an existing Matter.
2. Click on the Documents tab to open the Document Matter Listing.
3. Click the **New** button on the Speedbar.

From the Global Document Listing

1. Display the Global Document Listing. See Displaying the Document Listings.
2. Click the **New** button on the Speedbar.

From the File Menu

Select **File** and then **New** and then select **Document** from the Practice Manager Menu.

Using a Keystroke

Strike Shift + F8.

Fill Out the Document Profile

To complete the Document Profile, follow the instructions in Profiling Incoming Documents. For Kofax scanners, you must choose TIFF Viewer as the Application in the Application field of the Document Profile.

Scan the Document

To scan the document:

1. Click Open Document. The TiffViewer screen will open.
2. If a scanner has not been chosen, select Scan and then Select Scanner from the Tiff Viewer Menu.
   - A dialog will appear, asking you to confirm that you want to proceed to unload the current scanning engine. Click **Yes**.
   - Select **Scanning with image processing** from the next dialog that appears and click on **OK**.
3. If Scanner Settings need to be selected, select **Scan** and then select **Settings** from the Tiff Viewer Menu. The Settings Menu appears.
   - From the **Destination** field, select **ADF** if you are scanning a document using an Automatic Document Feeder. Using this setting, you can scan multiple pages in a single batch using a single document profile.
   - Select **Flatbed** if you are using a Flatbed scanner.

   Click **OK** after you have made your selection.
4. Start the scanning process. From the Tiff Viewer Menu:
   - Select **Scan** and then select **Page** to scan a single page.
   - Select **Scan** and then select **Batch** to scan a multiple page document.

   The scanner will scan the document and the image will appear in the Tiff Viewer screen.
5. To close the scanned image, select **File** and then select **Close** Image from the Tiff Viewer Menu. To save and exit the Document Profile, click on **Save Profile**.

Viewing Scanned Documents

Scanned images scanned with Paperport software can be viewed using ImageViewer™; those scanned with a scanner employing the Kofax Scanning Engine can be viewed with TiffViewer™. You can actually use any imaging application to view scanned documents within Practice Manager, however, be aware that Practice Manager's annotation feature is for use only with ImageViewer or TiffViewer. Scanned documents cannot be edited, unless they have been converted to word-processing document using OCR software, see Using OCR to Convert an Image to a Text Document. To view a scanned document, open it the same way as any other document. See Editing or Viewing a Document. Again, depending on how you scanned it, it will open in one of the above mentioned viewing programs. In both applications, you will find controls on the Toolbar and Menu that will enable you to:

- **Zoom**. Enlarge or diminish the size of the image.
- **Rotate** Rotate the image 90 degrees at a time.
- **Page**. Go from one page to the next in a multiple page document.
- **OCR.** Convert the image to a word-processing document, if it is a text document and the appropriate OCR software has been installed. See Converting a Scanned Image to a Text Document.
- **Print**. Print the document.
- **Annotate.** Annotate the image using Annotations, if your office has created Annotation screens using FormDesigner. See Adding an Annotation to a Scanned Document.

Adding an Annotation to a Scanned Document

If your office is using FormDesigner, an optional database development tool that can be purchased with Practice Manager, you will be able to include Annotations in scanned documents. Annotations are notes that you affix at a particular point in a scanned document that contain information relating to the document. Annotations are frequently used in litigation support. Annotations can include any information that you want—personal notes or observations, names of personnel or other Entities, identification numbers or dollar amounts. If Issues have been defined for a particular Matter, an Annotation can include an Issue relevant to the document. More than one Annotation can be created in a particular document. Annotations will be attached to a document after the document has been profiled using a Document Profile. To create Annotations, the document must be open and displayed on the screen. The Annotation feature can be used only if your office is using ImageViewer or TiffViewer to access scanned documents.

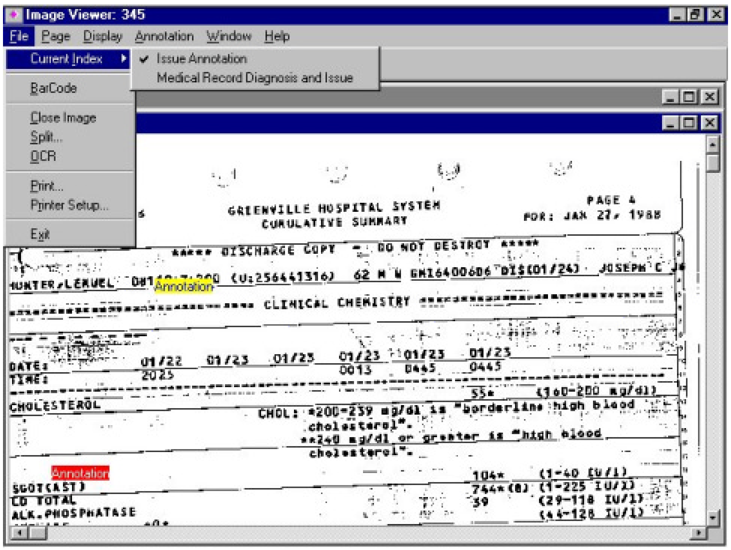
Creating an Annotation

1. Display either the Document Listing or the Matter Document Listing. See Displaying the Document Listing.

2. Locate and highlight the Document in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Documents displayed, see Filtering the Document Listing, or use the QuickSearch Window to find the Document, see Searching the Document Listing.

3. Click the **Open** button or double-click on the highlighted document to open it.

   If you have activated the Preference **Open profile first when opening document**, the Document Profile will open first. To open the document, click on the **Open Document** button in the Document Profile. The scanned document will appear.

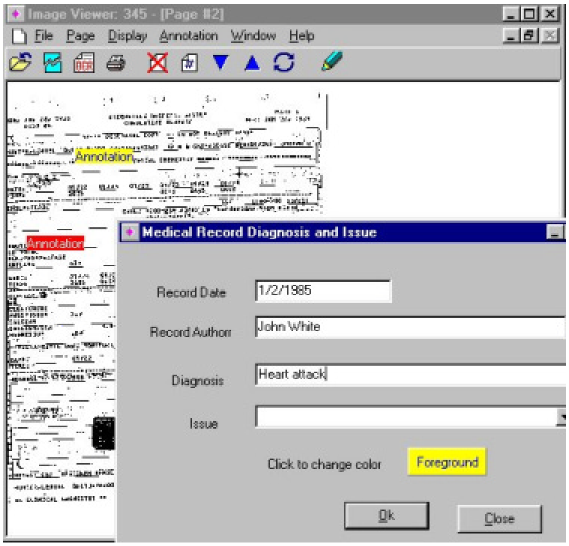


4 Since more than one Annotation may be available, choose an Annotation form to use:

- Select **File** and then select **Current Index** from the Menu; and
- Select the name of the Annotation form.

5 To start a new Annotation, click on the Annotation icon  in the Toolbar. An Annotation marker, in the shape of a pencil, will appear on the screen.

6 Move the Annotation marker to the place in the text where you want to insert the Annotation and click on that location. The Annotation screen will open.



7 Enter the required information in the fields on the screen and click **OK**. The Annotation will be represented by a colored rectangle. The color of the Annotation will depend upon how the Annotation feature was implemented in your office.

8 Repeat the previous steps to create additional Annotations in the document.

9 Select **File** and then select **Exit** to close the image and exit the program

Edit or Delete an Annotation

You can open and modify or delete any Annotation in the document.

To edit an Annotation:

1 Open the document containing the Annotations, as described above.

2 Move the cursor to the rectangle that represents the Annotation until the Mouse pointer turns into a hand.

3 Click the Right Mouse Button to display a dialog menu and select **Edit.** The Annotation dialog will open.

4 Make the desired changes and click **OK**.

To delete an Annotation:

1 Open the document containing the Annotations, as described above.

2 Move the cursor to the rectangle that represents the Annotation until the Mouse pointer turns into a hand.

3 Click the Right Mouse Button to display a dialog menu and select **Delete.** The Annotation will be deleted.

Converting a Scanned Image to a Text Document

Scanned images, consisting primarily of text, can be converted to a word-processing document using Optical Character Recognition (OCR) software, such as Xerox Textbridge. If your office has installed OCR software, you will be able to convert scanned images to word-processing text documents as part of the process of scanning the documents with Practice Manager.

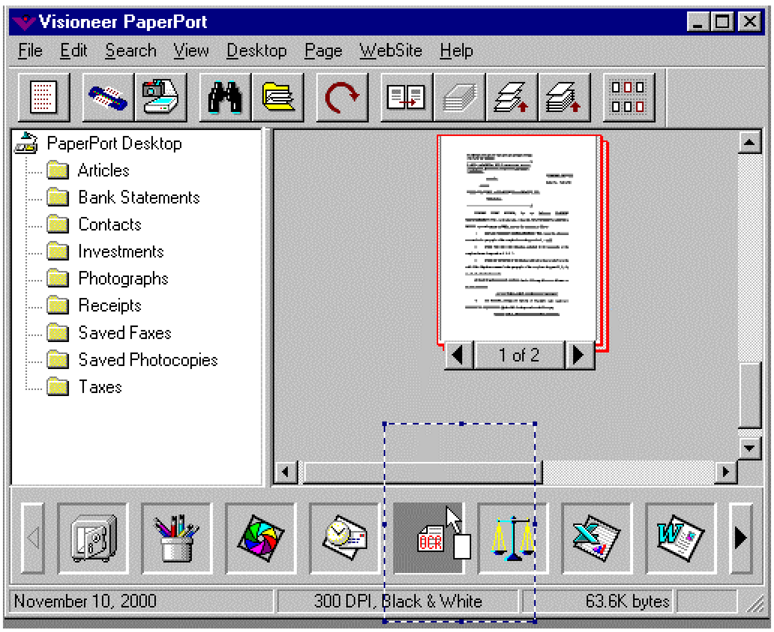
You can handle the conversion in two ways: Using Paperport software, you can convert a scanned image to a word-processing document directly from the Paperport desktop. The document will be converted to text and profiled in a Practice Manager Document Profile, but the scanned image will not be profiled in Practice Manager. If you want to retain both the scanned image and the converted text document, you can scan the document into Practice Manager first, open the scanned image in Practice Manager's ImageView program and then convert the image to a word-processing document from there. Practice Manager will create a Document Profile for both the scanned image and the word-processing document.

OCR Processing from the Paperport Desktop

1 Scan the document into your scanner.

- If you have Paperport scanner, scanning will begin automatically as soon as you place a document in the scanner.
- If you do not have a Paperport scanner, start the Paperport scanning software and then follow the manufacturer's instructions for scanning a document.
- If you have scanned the document correctly, the scanned image will appear on the Paperport desktop.

2 Click on the document image on the Paperport desktop and, while continuing to depress the Mouse Button, drag the document image in the direction of the Practice Manager OCR icon . As you drag the image, you will see the outline of the document, surrounding a small rectangle with an attached arrow, move across the Paperport desktop.



3 When the small rectangle is positioned over icon, release the Mouse Button. Practice Manager will become active and open a Document Profile. Complete the Document Profile as described in Profiling Incoming Documents.

4 To save and close the Document Profile, click on Save Profile.

5 To view the word-processing, click on Open Document. Practice Manager will open your word-processing software, enabling you to view and edit the document as a word-processing document.

OCR Conversion in ImageView

1 Locate and open the scanned image.

2 To start the OCR process:

- Click the OCR icon on the ImageView Toolbar 

- Select **File** and then select **OCR** from the ImageView Menu.

A Document Profile will open.

3 Complete the Document Profile as described in Profiling Incoming Documents. Practice Manager will start your OCR software, convert the image to a text document and open your word-processor. You may edit the word-processing document. When you are finished, close and save the document and return to Practice Manager.

4 To save and close the Document Profile, click on **Save Profile**.

5 To view the word-processing again, click on **Open Document**.

Copying Documents

Strategies for Copying Documents

Until the advent of programs like Practice Manager, the primary means of automating the production of documents was copying older documents and modifying them for their current use. A major stumbling block of that method was the difficulty in locating documents quickly. Even if you utilize the document automation features of Practice Manager, at times copying and modifying older documents may still be the most efficient way to generate a document quickly.

Recognizing the usefulness of this technique, Practice Manager gives you several ways to copy documents. Documents generated outside of Practice Manager can be copied into the program. You can also copy any document created in Practice Manager and its associated Document Profile to another matter within the program.

Copying a Document Generated Outside of Practice Manager

There are three ways to copy documentsthat were created in other programs.

- ♦ **Copying Using Drag and Drop.** By dragging the document from the directory listing in Windows Explorer (or WordPerfect) and dropping it into Practice Manager.
- ♦ **Copying by Inserting a Document.** By inserting a document created in the other program into a document created in Practice Manager.
- ♦ **Copying Using Cut and Paste.** By copying all or a portion of the other document and pasting it into a new document created in Practice Manager.

For the details of using these techniques, see Copying Document Created Outside Practice Manager.

Copying a Document Created in Practice Manager; Document Libraries

You can copy any document listed in the Document Listings from one Matter to another by using the **Copy** button. If you have a certain group of documents that you use frequently, you can copy all of them to a Document Library Matter. A Document Library Matter is a Matter that you create which functions solely as a place to store frequently used documents.

For detailed instructions on copying documents created in Practice Manager and creating Document Library Matters, see Copying Documents Created in Practice Manager and Using Document Library Matters.

Copying Documents Created in Practice Manager

You can copy any document created in Practice Manager from one Matter to another. Copying a document, and then modifying it is sometimes the fastest way to produce documents. If you find that you are copying particular types of documents frequently, you might consider copying them to a Document Library Matter. (For details, see Using Document Library Matters.)

Copying Documents from the Document Listing

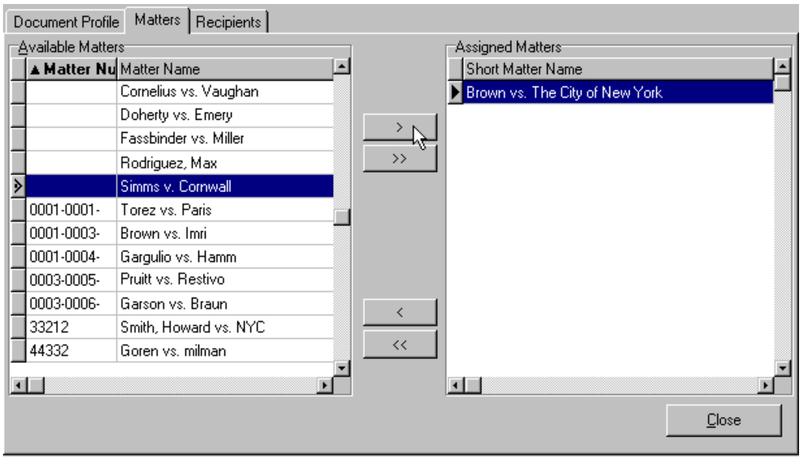
1. Display either the Document Listing or the Matter Document Listing. See Displaying the Document Listing.
2. Locate and highlight the Document you wish to copy in the Listing. You can use a QuickFilter, User-defined Filter or Query to limit the number of Documents displayed, see Filter the Matter Listing, or use the QuickSearch Window to find the Matter, see Searching the Matter Listing.
3. Click the **Copy** button located on the Speedbar. The Document Profile for the document will open. The Description field will be blank, but all other fields in the new Profile will already be filled out.
4. Enter a Description for the document.
5. If you want to copy the document to a different Matter, choose another Matter from the Matter list. For assistance in selecting the Matter, see Profiling Outgoing Documents.

6 Click **Save Profile** to save the Profile and exit the Document Profile screen, or click **Cancel Profile** to exit the Profile without copying the document.

Copying Documents from the Document Profile

1 Locate the document to be copied on the Document Listing and open its Document Profile.

2 Click the Matter tab located at the top of the Document Profile. A list of Matters will appears in the left pane of a dual-pane selection dialog box.



3 Copy the document to one or more Matters by selecting the Matters from the Available Matters list.

- To select a single Matter, highlight it in the Available Matters pane of the selection dialog and click the Assign button.
- To select all Matters, click the Assign All Button.
- To select a group of Matters, hold down the Ctrl key and click on each Matter you want to select and then, after releasing the Ctrl key, click the Assign Button.
- The Matters you have selected will appear in a list in the right pane under Assigned Matters.

4 You can remove a document from the Matters to which it has been assigned.

- To remove a document from a single Matter in the list of Assigned Matters, highlight the Matter in the right pane and click the Unassign button.

- To remove a document from a group of Matters, hold down the Ctrl key and click on each Matter you want to select in the Assign Matters list and then, after releasing the Ctrl key, click the Unassign button.

- To remove a document from all Matters to which it has been assigned, click the Unassign All button.

Copying Documents Created Outside Practice Manager

There will be times when you will want to copy a document that was created outside of Practice Manager. There are three ways to so this:

- **Copying Using Drag and Drop.** By dragging the document from the directory listing in Windows Explorer (or WordPerfect) and dropping it into Practice Manager. You can also use drag and drop to copy a document—including a fax message—that is attached to an E-mail message or other GroupWare Item. For details on how to copy GroupWare Attachments, see Importing a GroupWare Attachment.

- **Copying by Inserting a Document.** By inserting a document created in the other program into a document created in Practice Manager.

- **Copying Using Cut and Paste.** By copying all or a portion of the other document and pasting it into a new document created in Practice Manager.

Copying Using Drag and Drop

The easiest way to copy an entire document created outside of Practice Manager is to use “Drag and Drop”. To use this method, you must locate the existing document in Windows Explorer. When you “drag” the document into Practice Manager, a Document Profile will open automatically and you can profile the existing document like any other document in the program. Drag and drop will work with any type of document your Administrator has established as a linked application in Practice Manager.

To copy an existing document using "Drag and Drop"

1 Locate the other document in the directory. You can use Windows Explorer or WordPerfect's File Open screen to find the document. (Drag and drop will not work from the File Open screen in Microsoft Word.)

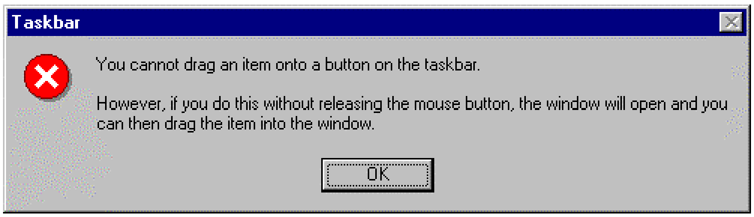
2 Make sure that Practice Manager has been started before you start the "drag and drop". Highlight the document – when you do, press and hold down Mouse Button.

3 While continuing to hold the Mouse Button, move the mouse pointer to the Windows Taskbar until it is pointing to the Practice Manager icon.

As you drag the highlighted document, you will see it as a faintly outlined icon. When the mouse pointer reaches the Practice Manager icon on the Taskbar, Practice Manager will open and become the active program. Continue to hold down the Mouse button.

4 After Practice Manager opens, drag the highlighted item completely into Practice Manager and then release the Mouse Button. A small ⊞ sign will appear next to entry as you drag it into Practice Manager.

Do not release the Mouse Button until Practice Manager has opened and you have dragged the document item completely into Practice Manager. If you release the Mouse Button too early while it is positioned on the Taskbar, the following error message will appear:



Press **OK**. Return to Windows Explorer or WordPerfect and try again.

5 Fill out a Document Profile for the document. A Document Profile will open automatically. If the document was created by your office, it should be profiled as an **Outgoing** document. If the document was created by an Entity outside of your office, it should usually be profiled as an **Incoming** document.

- For Outgoing Documents, see Profiling Outgoing Documents.

- For Incoming Documents, see Profiling Incoming Documents.
- Make sure you enter a Matter Number in the Document Profile and choose as the Application, the application that was used to create the imported document.

Copying Text Using Cut and Paste

You can copy all or a portion of a document that was not created in Practice Manager using standard copy, cut and paste techniques.

To Cut and Paste:

1. Use the application in which the document was created to open the document you wish to copy.
2. With the other application still open, return to Practice Manager.
3. Create a new Document Profile in Practice Manager for an Outgoing Document. See Profiling Outgoing Documents.
4. Disable automatic document assembly by clicking “Skip Document Assembly”.
5. After completing the Document Profile, click Open Document. This will create a new blank word-processing document. Place whatever text you want in the document or leave it blank.
6. Switch to the document in the other application.
7. Highlight all, or the portion of the other document you wish to copy, and select the **Copy** command used by that application to copy the text.

   If the application utilizes the standard Windows conventions, use one of the following commands:

   - Ctrl + C; or,
   - File and then Edit and then select Copy; or,
   - Click the Right Mouse Button and choose Copy from the pop-up menu.
8. Switch back to the document you created in Practice Manager (not the Document Profile).

9 To paste the portion of the document that was copied, move the cursor to where you want to paste the text and select the **Paste** command. In Microsoft Word and WordPerfect use:

- Ctrl + V; or,
- **File** and then **Edit** and then select **Paste**; or,
- Click the Right Mouse Button and choose **Paste** from the pop-up menu.

10 Save the document and return to Practice Manager.

Copying a Document Using the Insert Command

You can insert a document created in your word-processor outside of Practice Manager into a document created within Practice Manager.

1 Create a new Document Profile in Practice Manager for an Outgoing Document. See Profiling Outgoing Documents. Disable automatic document assembly by clicking "Skip Document Assembly".

2 After completing the Document Profile, click Open Document. This will create a new word-processing document with nothing it. Place whatever text you want in the document or leave it blank.

3 Move to the location in the document where you want to insert the other document.

4 Insert the document using your word-processor's "Insert" command.

5 Choose File and then Insert and then select File, find the document in the file manager and click OK. The document will be inserted at the location of the cursor.

6 Save and close the document.

Using Document Assembly

How Automated Document Assembly Works

If your office has implemented Practice Manager™'s document assembly features, you can automate the process of creating word-processing documents. Practice Manager uses the merge functions built into Microsoft Word or Corel WordPerfect to merge information stored in the Practice Manager database into documents created with those programs. If your firm has purchased HotDocs, this process is carried out in your word-processing application using the HotDocs document merge engine rather than the merge engine included in WordPerfect or Word. HotDocs has more powerful merge features and assembles document much more quickly than WordPerfect or Word.

Practice Manager uses Document Components to automate the creation of word-processing documents. A Document Component is a word-processing document, created in either WordPerfect, Word or HotDocs. A Document Component contains Merge Fields, capable of extracting information from the Practice Manager database.

There are several types of Document Components.The most important is the Template Component. Like other Document Components, a Template Component contains Merge Fields, but it can also contain special Merge Codes that enable other types of Document Components to be merged into it during the document assembly process. The other types of Document Components may contain your office letterhead, captions for pleadings, certificates of service and boilerplate text. A document is created automatically when Practice Manager activates a Template Component. When the Template Component is activated, a word-processing document is created, containing all of the information in the Template Component. Wherever the Template contains a Merge Field, Practice Manager inserts information from the relevant Matter into the new document. If the Template contains special Merge Codes for other types of Document Components, those Document Components will assemble additional documents which will be inserted automatically into the document assembled using the Template Component. The result will be a single word-processing document containing all of the merged information.

Automatic document assembly is initiated at the time you create a Document Profile for an Outgoing Document. See Creating Outgoing Documents. This process can be started in one of two ways: automatically or manually. During implementation of Practice Manager, your Practice Manager Administrator may have assigned or linked Template Components to certain Document Types. If so, the Template Component can be activated by choosing one of those Document Types when you complete the Document Profile for a new document. Even if the Document Type you select is not linked to a Template Component, you can choose to manually activate a Template by selecting the **Pick Document Assembly Components** option in the Document Profile. Whether a Template Component is chosen automatically or manually, you will initiate the merge process when you click the **Open Document** button in the Document Profile. For the details on making these choices in the Document Profile, see Document Assembly: Step-by-Step.

After you select **Open Document**, Practice Manager will start your word-processing application, if it is not open, and begin the merge process. If the Template Component contains Merge Fields intended to merge information about Entities, Practice Manager may display one or more Pick-Lists, containing the names of the Entities from which you can choose. A Pick-List will appear if the Template Component contains Merge Fields intended to extract information from the Practice Manager database about defendants, plaintiffs, and recipients of correspondence or Entities listed in certificates of service. After you select the appropriate Entities, the merge process will complete. Practice Manager will automatically assign a file name and storage location for the new document and that information will be recorded in the Document Profile. For the details on using Pick-Lists, see Using Pick-Lists During Document Assembly.

Document Assembly: Step-by-Step

Practice Manager uses the merge engine in Microsoft Word, Corel WordPerfect or HotDocs to automate the creation of Outgoing Documents. To understand how the document assembly process works, see How Document Assembly Works. Practice Manager uses Template Components to automate the document assembly process. A Template Component can be chosen in one of two ways: automatically or manually. A Template Component will be chosen automatically if it has been assigned to the Document Type you choose in the Document Profile. If a Template Component has not been assigned to the Document Type, you can automate the document by manually choosing a Template Component when you create the Document Profile. Both methods are discussed below.

Automatic Selection of Template Component

1 Start a new Outgoing document and open a new Document Profile. See Creating Outgoing Documents.

2 Fill out all of the fields in the Document Profile until you reach the Document Type field.

Since each Document Type is assigned to a Document Category, make sure you have chosen the Document Category that encompasses the Document Type you wish to select.

3 Choose a Document Type which has been assigned a Template Component.

You may not know whether a Document Type has been assigned a Template Component. Your Practice Manager Administrator may have assigned a Template Component to every Document Type; or the description of the Document Type may indicate that it has been automated. If you do not know for certain, you should ask your Practice Manager Administrator.

4 Complete the remaining fields of the Document Profile.

- Make sure you choose your word-processing application in the Application field.
- If the document being assembled is a pleading, and you have not yet assigned a Caption or Certificate of Service, or if you want to use a Caption or Certificate of Service different from the one already assigned to the Matter, click **Caption** or **Certification** at the bottom of the Document Profile and select one or the other. For detailed information on selecting and modifying a Caption or Certification, see Creating and Selecting a Caption or Certificate of Service.

5 Select **Open Document**.

6 If one or more Pick-Lists are displayed at this point, select the names of the applicable Entities from the list as specified in Using Pick-Lists During Document Assembly.

7 Edit and save the word-processing document.

Manual Selection of Template Component

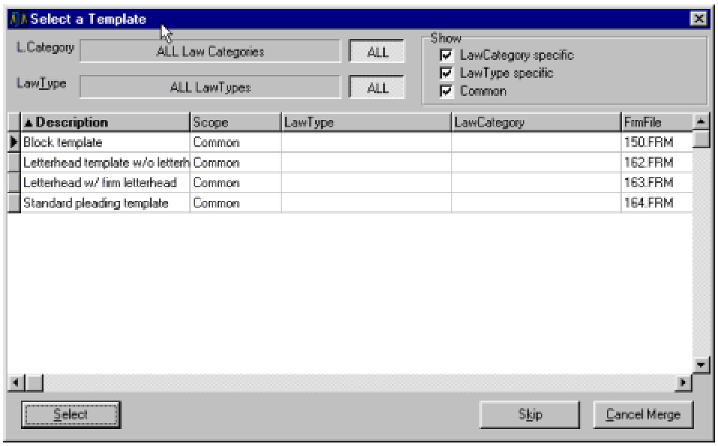
1 Start a new Outgoing document and open a new Document Profile. See Creating Outgoing Documents.

2 Fill out all of the fields in the Document Profile.

- Make sure you choose your word-processing application in the Application field.
- If the document being assembled is a pleading, and you have not yet assigned a Caption or Certificate of Service, or if you want to use a Caption or Certificate of Service different from the one already assigned to the Matter, click **Caption** or **Certification** at the bottom of the Document Profile and select one or the other. For detailed information on selecting and modifying a Caption or Certification, see Creating and Selecting a Caption or Certificate of Service.

3 Check **Pick Document Assembly Components**, located below the **Application** field. This activates the option to choose Template Components manually.

4 Click **Open Document**. A list of Template Components appears.

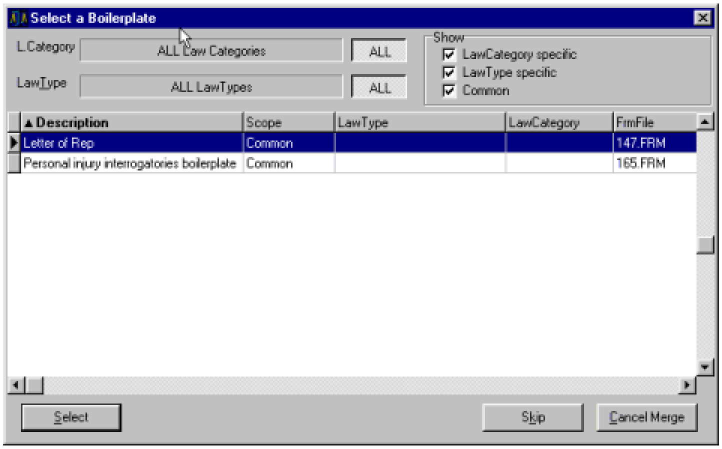


5 Highlight the Template Component you want to use and click **Select**.

For a general letter containing address and signatory information but no specific body, you will probably choose one of the standard letterhead templates. To create a pleading with a caption and certificate of service but no special text, choose one of the standard pleadings templates. If your office has created more specialized documents, that should be apparent in the description of the Template Components.

- If you want to cancel the merge process without creating a document, select **Cancel Merge**.
- If you want to by-pass the merge process and create a blank document, select **Skip**.

6 If the Template Component contains a special Merge Code for inserting a specific Boilerplate into the Template Component, a list of Boilerplate Components will appear.



7 Highlight the Boilerplate Component you want to use and click **Select**.

Normally, the Boilerplate Component will contain specific text that is to be inserted at a specific location in the Template Component. For instance, the Boilerplate might contain the specific terms of a retainer letter or a demand letter or the text of a particular type of motion of set of interrogatories.

- If you want cancel the merge process without creating a document, select Cancel Merge.
- If you want to continue with the merge process without using one of the listed Boilerplate Components, click **Skip**.
  Practice Manager will automatically insert a blank document within the new document at the location where Boilerplate would normally be inserted.

8 If one or more Pick-Lists are displayed at this point, select the names of the applicable Entities from the list as specified in Using Pick-Lists During Document Assembly.

9 Edit and save the word-processing document.

Using Pick-Lists During Document Assembly

During document assembly, Practice Manager can insert information from the Entity record of any of the Entities assigned to the Matter into the document being assembled. Practice Manager can merge information such as the Entity's name, address, social security number or date of birth. Practice Manager can also merge information relating to several Entities at the same time. This is done, for instance, when sending correspondence to multiple parties, choosing the defendants or plaintiffs for a caption, or entering names and addresses in a Certificate of Service. To enable you to choose the Entities, Practice Manager uses a list called a Pick-List. The Pick-List will appear automatically, if necessary, during the document assembly process. For more information on the document assembly process, see How Document Assembly Works and Document Assembly: Step-by-Step.

Types of Pick-Lists

There are a total of four Pick-Lists that may appear during document assembly, depending upon the Merge Fields included in the Template Component.

- **Addressee, CCs and BCCs.** This Pick-List is used to choose the Entities who will be the recipients of correspondence—the addressee of a letter, and those Entities who will receive carbon copies (CCs) or blind carbon copies (BCCs). A single Pick-List is used to make the selection for all three classes of recipients.

- **Defendants and Plaintiffs.** This Pick-List is used to identify the plaintiffs and defendants in a Matter. A single Pick-List is used to choose both the plaintiffs and defendants. Once the plaintiffs and defendants are identified, information such as their names can be used for captions in pleadings.

- **Certification of Service Entities.** This Pick-List is used to identify the Entities to be included in a Certificate of Service.

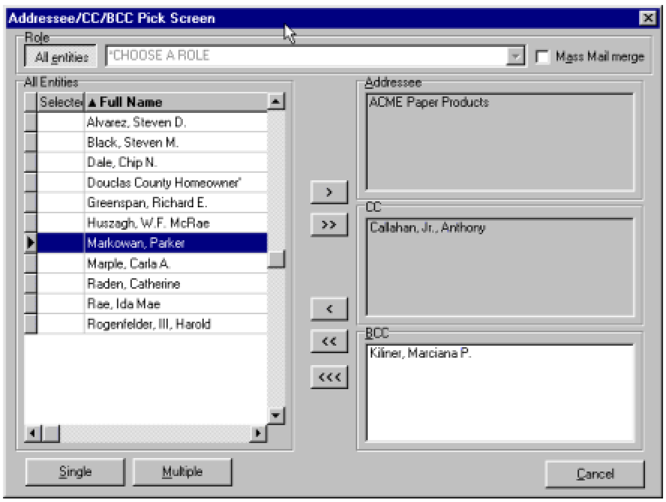
- **Subject.** The final Pick-List can be used to identify the “Subject” of a document. This type of Pick-List is used to identify Entities who do not fall into any of the other classifications. For instance, for notices of deposition, the deponent can be selected from the “Subject” Pick-List.

Making Selections from Pick-Lists

There are two types of Pick-Lists. The first type of Pick-List—which will be called the “Multiple Class Pick-List”--allows you to choose several classes of Entities at the same time. The Multiple Class Pick List is used to select Addressees, Defendants and Plaintiffs. The second type of Pick-List--the “Single Class Pick-List”—is used to choose a single class of Entities. The Single Class Pick-List is used to select Certificate of Service Entities and Subject Entities. Pick-Lists appear after you select **Open Document** in the Document Profile.

Using Multiple Class Pick-Lists

An example of a Multiple Class Pick-List is the Addressee/CC/BCC Pick List.



Using this Pick-List, you can select Entities for all three classes of addressees at the same time.

1. Choose the class of recipient by clicking on the field just below the name of the class listed in the right pane of the Pick-List—Addressee, CC or BCC. When the type of recipient has been selected, the field will turn from grey to white.

2. Select the Entities to be included in the class of recipient.

3 You can Filter the Entity List by the Role of the Entity in Matter. To use the filter, click on the **All entities** button and select a Role from the drop-down list.

- To select a single Entity, highlight it in the All Entities pane of the Pick-List and click the Assign button.
- To select all Entities, click on the Assign All button.
- To select a group of Entities, hold down the Ctrl key and click on the Entities you want to select and then, after releasing the Ctrl key, click the Assign button.
  The Entities you have selected will appear in a list for the class that was selected on the left side of the Pick-List.

4 To remove Entities from the list selected for a class of Entities.

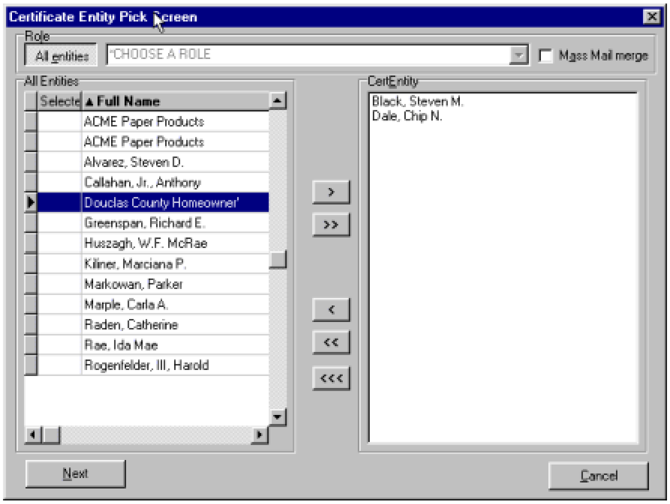
- Choose the class by clicking on the field just below the name of the class so that it turns white.
- To remove a single Entity from the list, highlight it and click the Unassign button.
- To remove all Entities from the list, click on the Unassign All button.
- To remove all selected Entities from all classes, click on the Unassign All button.
  The Entities that have been removed will now appear in the left pane of the Pick-List.

5 Close the Pick-List.

- In the case of the Addressee Pick-List, click on **Single** if the information about all addressees will appear in a single document; if information about each addressee will appear in a separate document, click on **Multiple**.
- In the case of any other Pick-List, click the **Next** button.

Using Single Class Pick-Lists

An example of a Single Class Pick-List is the Certificate Entity Pick-List. The procedure for choosing Entities from a Single Class Pick-List is the same as for a Multiple Class Pick list, except it is not necessary to choose a class before selecting the Entities.



1 To select the Entities:

- If you want, Filter the Entity List by the Role of the Entity in Matter. To use the filter, click on the **All entities** button and select a Role from the drop-down list. Only the Entities assigned that Role will appear in the list.
- To select a single Entity, highlight it in the All Entities pane of the Pick-List and click the Assign . button.
- To select all Entities, click on the Assign All . button.
- To select a group of Entities, highlight them by holding down the Ctrl key and clicking on the Entities you want to select and then, after releasing the Ctrl key, click the Assign button.
  The Entities you have selected will appear in a list on the left side of the Pick-List. .

2 To remove Entities from the list selected for a class of Entities.

- Choose the class by clicking on the field just below the name of the class so that it turns white.

- To remove a single Entity from the list, highlight it and click the Unassign button.
- To remove all Entities from the list, click on the Unassign button.
- To remove all selected Entities from all classes, click Unassign All button.
  The Entities that have been removed will now appear in the left pane of the Pick-List.

3 Close the Pick-List by clicking the **Next** button.

Other Document Features

Using Version Control

You can create and keep track of multiple versions of the same document in Practice Manager. You can require Practice Manager to prompt you to create a new version of a document automatically each time it is opened for editing, or you can manually create a new version when you want to do so. All versions of the document are maintained on the **Versions Listing**, which you can access from the Document Listings or the Document Profile for the document. From the Version Listings, you can edit each version of the document, edit the description of each version or delete the original document or any of its versions. Practice Manager maintains the most recent version of the document in the Document Listings.

Manually Creating a New Version of a Document

A new version of a document is created from the Document Profile of the Document.

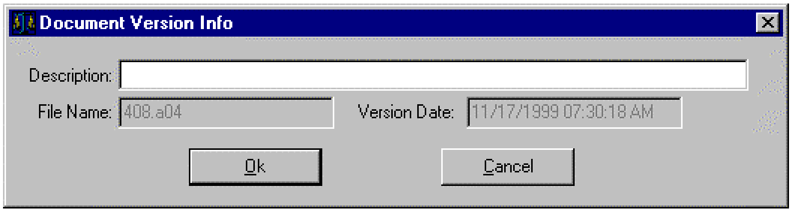
1 Locate the document in the Document Listing.

You can use a QuickFilters, a User-defined Filter or a Query to limit the number of Documents displayed, see Filtering the Document Listing or use the QuickSearch Window to find the Document record, see Searching the Document Listing.

2 Open the Document Profile.

- Click **Profile**
- Click **View Profile** from the View Menu.

3 Click the **New Version** button on the tight side of the Profile screen. The Document Version Information screen will appear.



4 Enter a description for the new version of the document in the Description field. Practice Manager will automatically assign the version a new file name and a date.

5 Click **OK** to save the version information and close the Document Version Information screen; click **Cancel** to cancel the creation of the new version. Practice Manager will create a copy of the document and open it for editing.

6 Make any changes you want to make to the new version of the document and save it in your word-processing application.

7 Return to Practice Manager and close the Document Profile.

Automatic Version Control

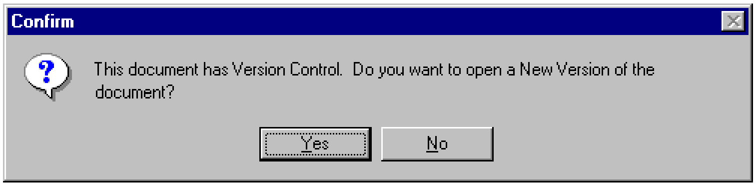
When you create the Document Profile for a document, you can specify that a new version of the document will be generated automatically every time it is opened from the Document Profile.

Activating Automatic Version Control

To active Automatic Version Control, click the **Version Control** checkbox in the Document Profile for the document (to the right of the Date field). Click the **Save Profile** button to save and close the updated Document Profile.

Using Automatic Version Control

To use Automatic Version Control after it has been activated, open the Document Profile for the Document. When you click the **Open Document** button to open the document, the following message will appear:



Click **Yes** to create a new version of the document. Click **No** to open the document without creating a new version. Since Practice Manager maintains the last version of a document on the Document Listing, the document opened when you make this selection will be the last, not the original, version of the document.

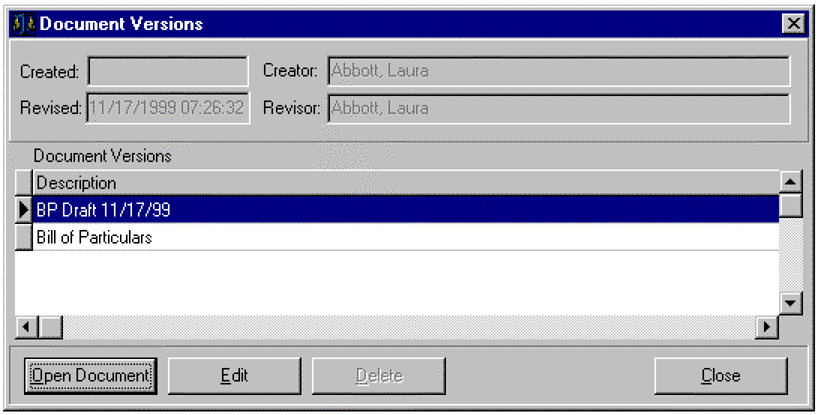
Using the Versions Listing

The Versions Listing displays a list of all versions of a document. You can open the Versions Listing from the Document Listings or the Document Profile. From the Versions Listing, you can edit the description of the document and edit or delete the document itself.

To open the Versions Listing:

- From the Document Listings, select Versions Listing from the View Menu.
- From the Document Profile, click the Versions button located at the bottom of the Document Profile.

The Versions Listing will appear.



To open a document:

Highlight the version of the document you want to open and click **Open Document**.

To edit the Version Description:

Highlight the document version and click **Edit**. The Document Version Information screen will appear. Edit the Description and click **OK** to save the changes or **Cancel** to cancel them.

To delete a version of a document:

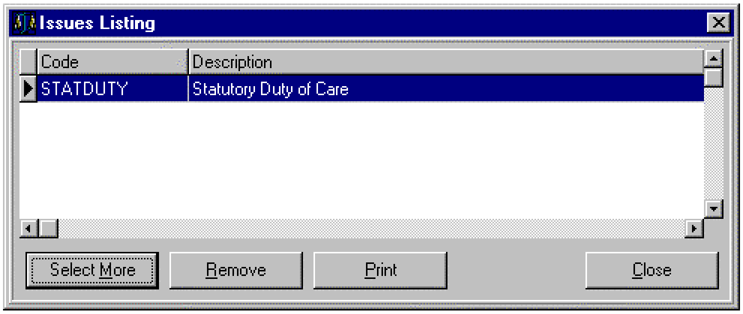
Highlight the version of the document you want to delete and click **Delete**. A dialog will appear. Click **Yes** to delete the document or **No** to cancel the deletion.

Note: *You cannot delete the latest version of the document from the Version Listing. Since Practice Manager maintains the latest version of a document in the Document Listing, you should delete the document from there. See Deleting a Document.*

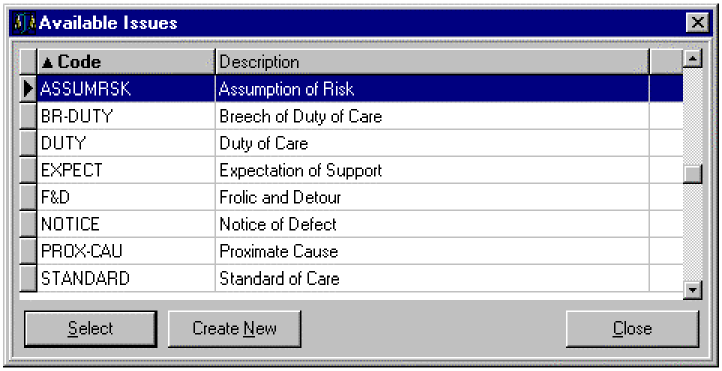
Assigning Issues to Documents

You can relate Issues to one or more Documents in a Matter. Issues are assigned to Documents in the Document Profile for the document. You can make the assignments from either the Global Document Listing or the Matter Document Listing. To assign Issues to a document:

1. Display the Document Listing.
2. Locate and highlight a Document in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Documents displayed, see Filtering the Document Listing or use the QuickSearch Window to find the Document, see Searching the Document Listing.
3. Click **Profile** to open the Document Profile for the Document.
4. Click the **Issue** button located at the bottom of the Document Profile. The Issue Listing will appear. Any Issues that have already been assigned to the Document will appear in the Listing.



5 To assign an Issue to the Document, click **Select More**.



The Available Issues dialog will appear, displaying the Issues that are available for assignment in the Matter.

- To assign an Issue, highlight it in the list and click **Select**.
- You will be returned to the Issue Listing and see that the Issue will now appears here.
- Repeat this process to assign additional Issues to the Document.
- If an Issue does not appear on the Available Issues list, add it by clicking on **Create New**.
- Follow the instructions in Selecting and Creating Issues for creating an Issue.
- To close the Issue Listing, click on **Close**.

All of the selected Issues will now be assigned to the Document.

Attaching a Document to a GroupWare Item

If your office has installed a GroupWare application, such as Microsoft Outlook or Exchange, you can automatically attach a Document to a GroupWare Item, such as an e-mail, note or a task. The Document will be transmitted to the recipient of the GroupWare message. You can attach a document to a GroupWare Item from the Document Listings or the Document Profile of the Document.

1. Display either the Global Document Listing or the Matter Document Listing. See Displaying the Document Listings.

2. Locate and highlight the Document in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Documents displayed, see Filtering the Document Listing or use the QuickSearch Window to find the Document, see Searching the Document Listing.

3. To start a GroupWare Item:

   - Select **GroupWare** from the View Menu

   - Click the **Profile** button to open the Document Profile and then click on **GroupWare.**

   The GroupWare Listing will appear.

4. Click **New** to start a new GroupWare Item.

5. Select an appropriate GroupWare Template by highlighting it in GroupWare Listing.

   - Practice Manager will attach the document automatically to any GroupWare Item, regardless of the Template used to generate it.

   - Clicking on the **Doc. Type** radio button will disclose those Templates that have been expressly created for use with the Document Type of the document being attached to the GroupWare Item. GroupWare Items created with those Templates may include special language or be directed to specific recipients.

6. After highlighting the appropriate Template, click **Send**. A new GroupWare Item will be initiated in your GroupWare application with the Document attached.

7 Complete the GroupWare Item following the instructions in Creating a GroupWare Item.

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Using Notes

Overview of Notes

With Practice Manager, you can create Notes to record and organize client information, significant events, legal research, trial preparation, settlement discussions and other significant information. Normally, you will create Notes in connection with a particular Matter, but Notes can also relate solely to a particular Entity. You can activate the Template option with notes as well, which will automatically insert pre-formatted text for you to work with when creating a note. All Notes, whether they relate to a specific Entity or Matter, can be found on the General Note Listing, and Notes relating to a specific Matter are maintained under that Matter's Notes tab (the Matter Note Listing). A Note created for a single Entity or Matter can be related easily to other Matters and Entities. Because Notes can also be linked to Issues and Annotations, they constitute a valuable tool for Litigation Support.

Using the Note Listing

From the General Note Listing, you can create, view, edit, print and delete Notes. The Note Listing can be sorted, searched and filtered by author, description, date or type. Using QuickFilters, User-defined Filters and Queries, you can limit the Notes displayed to a particular author, type, date range or issue. Both the Note Listing and the contents of Notes can be printed, individually or jointly, to provide organized summaries of important file information in whatever manner the Notes are filtered, organized, and ordered.

Notes Listing Functions

You can display three different Note Listings from Practice Manager:

- The **General Notes Listing**, which displays both Matter Notes and Entity Notes.
- A **Matter Notes Listing**, which displays Notes within a Matter related to that Matter.
- An **Entity Notes Listing**, which you can display when reviewing a particular Entity record.

For instructions on displaying the Notes Listings, see Displaying the Notes Listing.

From each of the Notes Listings, you can

- Create a New Note. You can base it on a Template if you wish.
- View and Edit Notes.
- Delete Notes.
- Change the Notes Listing layout. Change the order, size and number of fields displayed on the Note Listing.
- Sort Notes. Sort the Note Listing by date, Note type, or author in ascending or descending order.
- Search for particular Note. Using the Quick-search Window, quickly locate the Note you wish to view by its author, description or type.
- Filter the Note Listing. Using QuickFilters, you can limit the Notes displayed to particular authors, types or a range of days. With User-defined Filters and Queries, you can create more complex queries to display Notes based upon any of a Note's fields, including Issues and Matters to which the Note has been linked.
- Print Notes and their contents. Print the sorted and filtered Note Listing or the content of all the Notes listed on the Listing.
- Place or receive a telephone call or phone message. If your system is set up correctly, place a phone call with the touch of a button (the system

actually dials for you) and record all details. Phone call records are kept with notes for easy reference.

Displaying Note Listings

Practice Manager gives you access to three Note Listings--the General Note Listing, the Matter Note Listing and the Entity Note Listing.

Display the General Note Listing

The General Note Listing displays all Notes created in Practice Manager for all Matters and Entities. To access and display the General Note Listing:

- From the Practice Manager Toolbar

  Click the Note Listing icon  on the Practice Manager Toolbar.

- From the Practice Manager Menu

  Select **File** and then **Open** and then select **Notes** from the Practice Manager Menu.

- Using a Keystroke

  Strike F10.

Display the Matter Notes Listing

From within any Matter, you can view a Note Listing of all notes relating only to that Matter. To display the Matter Note Listing:

1. Select and open an existing Matter.
2. Click on the **Notes** tab.

Display the Entity Notes Listing

You can create Notes that are linked to one or more specific Entities. Those Notes are displayed on the Entity Notes Listing, which can be accessed from the Entity record. To display the Entity Notes Listing:

1 Display the General Entity Listing or a Matter Entity Listing in a Matter to which the Entity is assigned. See Displaying Entity Listings.

2 Locate the Entity on the Entity Listing and highlight the record. If necessary, use the QuickSearch Window to search the Entity Listing.

3 To open the Entity Notes Listing:

- From the View Menu, select **Show Notes**
- **Open** the Entity record and hit the **Note** button (located at the bottom of the screen).

Changing the Notes Listing Layout

The columns of a Note Listing display, in list format, information from fields in the Notes you have created. The number, order and size of the columns can be changed to disclose the information you wish to view.

What Columns Should Be Displayed

You can display the following fields in a Note Listing:

- **Description.** The description of the subject matter of the Note.
- **Author**. Author/Creator of the Note, or person on whose behalf the note was created.
- **Date Created**. The exact date and time the Note was first created.
- **Type.** A way of classifying Notes. Your firm can devise whatever classification scheme it wants.
- **Locked.** Whether anyone other than the creator of the Note (the person logged onto the computer when the Note was created) can open it.
- **Private.** Whether anyone other than the creator of the Note can see the Note in the Note Listing.

Adding, Removing, Ordering and Resizing Columns

You can add, remove, order and resize columns on a Note Listing, just like other Listings. To make these changes to the columns listed on the Column Heading Bar, you will access the Column Control Menu or drag the columns to the proper location and adjust column edges. For detailed information on how to change the layout of Listings, see Listing Components and Controls and Customizing the Listing Layout.

Sorting the Notes Listing

Notes can be sorted by any field displayed in the Note Listing, in ascending or descending order, alphabetically or numerically, depending upon the field. You will probably choose to sort Notes by the date they were created—the **Date Created** field. You select the Sort Field and change the sort order of the Note Listing, just like other Listings. See Sorting Listings.

To select the Sort Field and set the Sort Order:

1. If the Sort Field does not appear as a column heading on the Column Heading Bar, add the desired column to the Note Listing layout. See Changing the Notes Listing Layout.

2. Double-click on the column of the field in the Column Heading Bar to choose the field and sort it in ascending order, indicated by the ▲ symbol. To change to descending order, double-click again. The sort indicator will change to ▼.

   An alternate way to change the sort order: Point to the column to be used for sorting, display the Column Control Menu and choose "Ascending" or "Descending" from the menu.The new sort order will remain in effect until you close the Notes Listing.

3. To **Save** the selected sort option, right mouse click on the Column Heading Bar and select **Save Grid Layout** from the menu.

Searching Note Listings

To view or open an existing Note, you must locate it on the Note Listing. If the Note Listing is lengthy, you can use the QuickSearch Window, available on all Listings, to search for a particular Note. To search for a Note, you must first set the field to be used for the search as the Sort Field. Normally, you will seek to locate a Note by its description and so will want to use Description as the Sort Field. For more detailed information on searching Listings in general, see Searching for Records in Listings.

Search for Notes

1 Limit the number of Notes displayed, if you wish, using the QuickFilters, a User-defined Filter or a Query. For instance, you could limit the Notes to those where you are the Author. See Filter the Note Listing.

2 Select the Sort Field for the search, such as Description.

3 Type the first few characters of the first word or words applicable to the Sort Field you are trying to match. For instance, if you are searching for "Settlement Discussions"--part of the Description of the Note--you might enter "Settlement".

As you type, the QuickSearch Window will open, displaying the characters you have entered. All Notes whose Description begins with the characters you have entered will be displayed in the Note Listing.

4 If you can only remember a portion of the words you are using for the search, place the wildcard character “*” (an asterisk) before or after the search string. This allows you to search for Notes **containing** particular characters. Thus, in the foregoing example, typing "*Settlement*" would display every Note that contained that word at any location in the Description.

5 To clear the Search window for a new search,

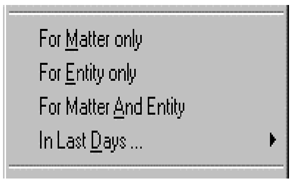
- Delete the characters in the QuickSearch Window
- Hit the Esc key on your keyboard
- Double-click on another column heading in the Notes Listing.

Filter the Note Listing

You can limit the number of Notes displayed in the Note Listings using QuickFilters, User-defined Filters or Queries. In User Preferences, you can set options that activate a specific Filter or Query for the Note Listings or present the list of Filters and Queries from which to choose each time you open a Note Listing. See Setting Filter Options for Listings.

QuickFilters

Select one or more of the QuickFilters from the Filter Bar to limit the records displayed. For detailed information on QuickFilters and the use of QuickFilter controls, see Using QuickFilters and Listing Components and Controls.



Selecting:

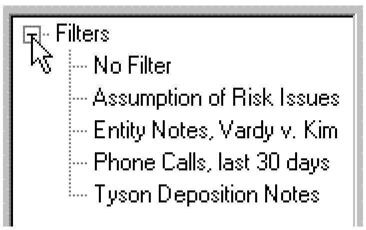
- **Matter:** Displays all Notes in the Note Listing relating to Matters.
- **Entity:** Displays all Notes in the Note Listing relating to Entities.
- **Matter and Entity:** Displays notes assigned both to Matters and Entities. (To filter for this on the Filter Bar, simply check off both boxes)
- **Note Type:** Displays all Notes in the Note Listing of a particular Note Type.
- **Author:** Displays Notes for which the selected Entity was designated as the author.
- **In last. . . days:** Displays all Notes created within the stated period of days.

User-defined Filters and Queries

You can create, save and retrieve Filters and Queries, based upon one or a combination of several fields included in a Note. For detailed information on using Filters and Queries, see Creating Filters to Select Records and Using Queries to Filter Listings. Filters and Queries include filter criteria not contained in QuickFilters, such as Creator, and can be used to create complex queries that combine multiple search criteria. For instance, you could create Filters or Queries to display Note Listings relating to more than one Author or Note Type.

Retrieving a Saved Filter from the Treeview Box

In addition to other Filter options discussed above, the Notebook Listing includes a convenient Filter retrieval feature in the Treeview box on the left side of the Listing Screen.



Displayed in Windows Explorer-like format, the Treeview Filter option allows you to view saved filters at a glance and make a selection from the list. For details, see Applying Filters from the Listing Treeview Box.

View and Edit Notes

Once it has been created, a Note can be opened for editing. Rather than creating a separate Note for each significant event or item of information in a Matter, some firms prefer to add information to existing Notes. You open a Note for editing from one of the three Note Listings--the General Note Listing, the Matter Note Listing or the Entity Note Listing. You can also view a Note in a Note Listing without opening it by using the Note Preview feature. See **Preview a Note**.

Open a Note

1 Open the Note Listing. See Displaying Note Listings.

2 Locate the Note in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Notes displayed, see Filter the Note Listing or use the QuickSearch Window to find the Note, see Searching Note Listings.

3 Highlight the Note and click **Open** to open the Note for editing, or simply double-click on the Note.

Preview a Note

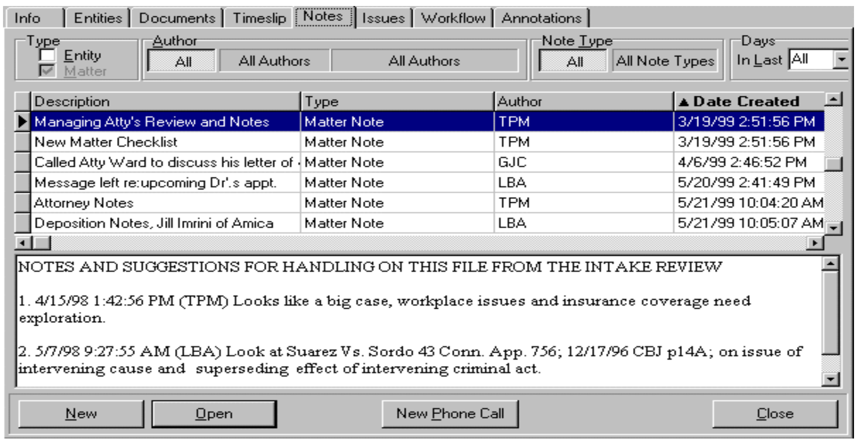
1 Locate the Note you want to view in the applicable Note listing as described above.

2 Highlight the Note.

3 Display the View Menu by

- Choosing **View** from the Practice Manager Main Menu
- Clicking the Right Mouse Button.

4 Click **Preview Item** to start the Note Viewer. A "✓" indicates that the Preview mode is active.



5 The Preview setting will remain active until you de-activate it. To preview a different Note, simply highlight it in the Note Listing.

6 To de-active the Note Viewer, click **Preview Item** again. The "✓" will disappear.

Printing Notes and the Notes Listing

Like other Listings, each type of Note Listing can be printed:

- To the screen
- To the printer, or
- To a file

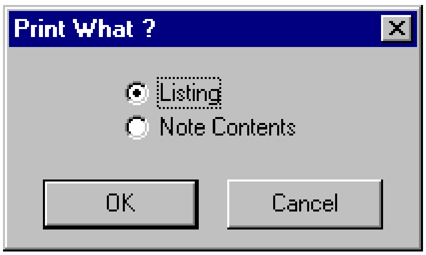
Listings printed to a file can be edited in your word-processor. Unlike other Listings, the contents of Notes displayed in a Listing can also be printed. Before printing a Note Listing or Note contents, you can use QuickFilters, a User-defined Filter or a Query to limit the records displayed in the Note Listing. See Filter the Note Listing.

To print a Note Listing:

1 Display the filtered Note Listing.

2 Click on the Print icon  located on the Practice Manager Toolbar.

A print menu will display.



3 Choose **Listing** from the Menu.

4 To print the Note Listing to the screen or the printer, follow the instructions in Printing Listings.

5 To print the Note Listing to a file:

- Instead of using the Print icon, select **File** and then select **Print** from the Practice Manager Menu.

- From the Print sub-menu that appears select **File.**
- Insert a name for the file and click **Save**.

For further information on printing to a file, see Printing Listings.

To Print the Content of a Note

You can also print the contents of a single or multiple Notes. To print the content of Notes, follow the preceding instructions:

1. Filter and display the Notes whose contents will be printed.
2. Click on the Print icon  located on the Practice Manager Toolbar.
3. When the **Print What?** Dialog is displayed, choose **Note Contents** and click **OK.**

   The Print Preview screen will appear, displaying the content of the selected Notes.
4. To print the Note contents to the screen or the printer, follow the instructions in Printing Listings.

Deleting Notes

You must delete a note from one of the Note Listings; either the General Note Listing, the Matter Note Listing or the Entity Note Listing.

To delete a note

1. Open the Note Listing. See Displaying Note Listings.
2. Locate the Note in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Notes displayed, see Filter the Note Listing or use the QuickSearch Window to find the Note, see Searching Note Listings.
3. Highlight the Note and
   - Hit Ctrl + D
   - Select **File** and then select **Delete** from the Practice Manager Menu.

Placing, Receiving and Recording Telephone Calls

Using the Telephone call feature, you are able to place and receive calls as well as relay messages. If your System Administrator has the automatic dialing feature installed, you can even dial the phone with the touch of a button. You can quickly record all call details, and in the future, the information will appear in the Notes listing for easy reference as a Phone Call Note. This way it can be organized along with other case notes and related to matters, entities and issues like any other note.

Accessing the Phone Call Feature

From the Matter Notes Listing or the General Notes Listing.

You can access the Phone Call feature from the General Notes Listing or, if you are working in a Matter, from the Matter Notes Listing.

1. Open the General Notes Listing or the Matter Note Listing. See Displaying Note Listings.
2. Click the **Phone Call** button on the Speedbar.

From the Entity Notes Listing.

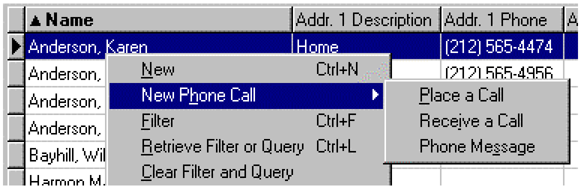
The **Phone Call** button is also a feature in the Entity Notes Listing.

1. Open the Entity Notes Listing. See Displaying Note Listings.
2. Click the **Phone Call** button on the Speedbar.

From the Entity Listings.

Perhaps most conveniently, you can access the Phone Call feature directly from the Entity Listing itself. The advantage here is that many fields will be completed automatically for you - most thoroughly from the Matter Entity Listing.

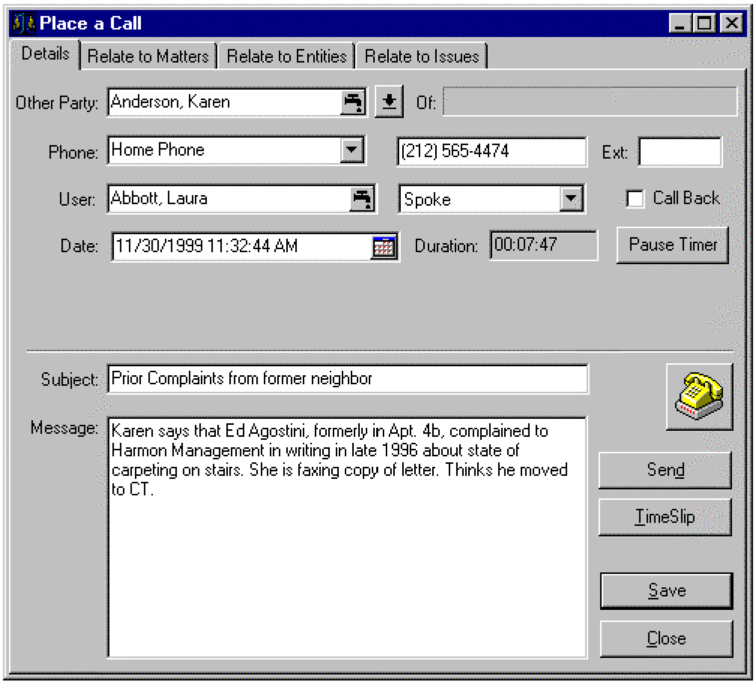
1. Open the General Entity Listing or the Matter Entity Listing. See Displaying Entity Listings.
2. Find the Entity who is the focus of the phone call. See Searching for Records in Listings.
3. Right-mouse-click on the record. From the menu that appears, select **New Phone Call**.



4 A sub-menu appears. You can place a call, receive a call or take a message.

Placing a Call and Completing the Phone Call Form

After you select **Place a Call**, the Phone Call form appears. If you have accessed the feature from the Entities Listing, most fields will have been filled out automatically with the appropriate information. You can edit this as you wish.



If your system administrator has automatic dialing installed, simply hit the Telephone  button and the call is automatically dialed for you. The clock on the upper right tracks your time, starting automatically when you create the call. Use the Subject and Message Fields to record call topic and details. In the future this record will appear on your notes Listing.

Email. The **Send** button on the lower right allows you to email the contents of this message to a colleague instantly. For details, see Sending an E-Mail Message and/or Sending a Note as an E-Mail or Task. The text of the phone message will automatically appear in your email message.

Timeslip. Hitting the **Timeslip** button allows you to generate an automatically completed timeslip. Remember that your time has been tracked. See Creating a New Timeslip for details.

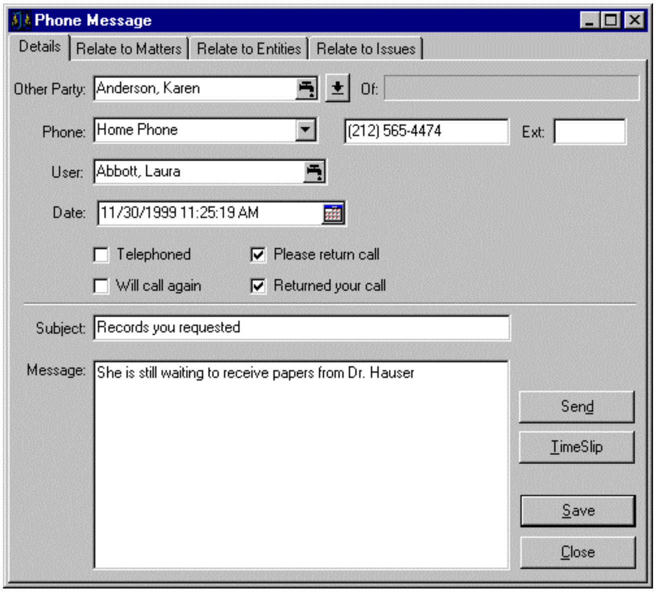
Links. The tabs along the top of the Phone Message form allow you to link this Phone Call Note to the appropriate Matter, Entity and Issues. If you have accessed the feature through the Matter Entities Listing, the matter and entity link will be in place automatically. You will not need to do it. For detailed information on how to make these links see Relating Notes to Issues, Entities and Matters.

Receiving a Call

Receiving a call is not much different than placing one. In this instance, you will again use the form to record call details and make the appropriate links for later reference.

Taking a Phone Message

When you select Phone Message from your menu of Phone call options, the Phone Message form appears. It contains additional checkboxes to speed your message taking.



Fill it out with the appropriate information. Then you can hit the **Send** button to email it instantly to the recipient. At the same time, a record of the call is kept in Notes. This enables you to keep a comprehensive history of your office activity surrounding a particular case or entity.

Creating a New Note

You can create a new Note from the General Note Listing, the Matter Note Listing, or an Entity record. Or you can use one of three shortcuts. If you have selected **Use Note Template** in Preferences, you will be given the option to use a Note Template to fill in parts of the Note. See Setting Other Preferences. After you have completed the Note, you can assign it to one or more Entities, Matters, Issues or Annotations.

Start the Note

From the Matter Note Listing.

The most efficient way to utilize Notes is to create them after you have opened a Matter from the Matter Note Listing.

1 Create a new Matter or open an existing Matter.

For instructions on creating a new Matter, see Steps Involved in Creating a New Matter. To open an existing Matter, see Open an Existing Matter.

2 Click the **Notes** tab.

3 Click **New** on the Speedbar.

From the General Note Listing.

You can create a new Note at any time from the General Note Listing.

1 Open the General Note Listing. See Displaying Note Listings.

2 Click New on the Speedbar.

From an Entity Record.

You can create a Note from an Entity record and it will be assigned automatically to the Entity.

1 Create a new Entity record or open an existing one. For instructions on creating a new Entity, see Creating a New Entity Record. To open an existing Entity record, see Modifying and Deleting Entity Information.

2 Click **Note** at the bottom of the Entity Information screen. The Entity Note Listing will display.

3 Click **New** on the Speedbar.

Using a shortcut.

You can start a new Note from anywhere in Practice Manager by using a shortcut.

- **Toolbar icon.** Click the New Note icon .
- **Menu selection.** Select **File** and then **New** and then select **Note** from the Practice Manager Menu.
- **Shortcut Keystroke.** Hit Shift + F10.

Using a Note Template

After you start a new Note, if you have elected to use Note Templates, the Note Template Listing will be displayed. A Note Template can automatically fill in certain of the fields in the Note, partially or completely--Type, Author, and Description and the Body of the Note. If you want to use a Note Template, select the Note Template from the list. See Using Templates When Creating Records. You can also view, edit or modify an existing Template or create a new Template from the Template Listing.

Complete the Note

Complete the Note, following the instructions in Complete Fields and Enter Text in Notes.

Assign the Note to a Matter, Entity, Issue or Annotation

Practice Manager will automatically relate a Note created in a Matter to that open Matter and a Note created in an Entity Note Listing to the open Entity record. You can also assign a Note to any Matter, Entity, Issue or Annotation. See Relating Notes to Issues, Entities and Matters.

Save the Note

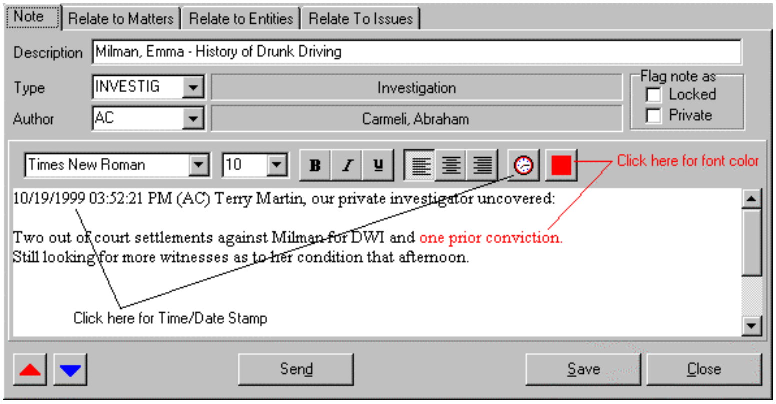
Click **Save** to save and close the Note. If you want to close the Note without saving it, click **Close** and respond **No** to the prompt "Do you want to save the note?"

Include the Note in an E-mail or Task

If your firm has installed a GroupWare product, such as Microsoft Outlook, you can include the text of the Note in an E-mail or a Task. See Sending a Note as an E-Mail or Task.

Complete Fields and Enter Text in Notes

Once you have opened a new Note, enter information into the fields of the Note, including the Note text. If you chose a Note Template when you started the Note, some of the fields may already be completed. When you have completed the Note, you will save it.



Note Fields

- **Description.** Enter a description of the subject of the Note, sufficient to locate it in a later search. As many as 90 alphanumeric characters are permitted.

- Type. Select the Type of Note from the list. Your firm will decide what Note Types are appropriate during implementation of Practice Manager. Note Types are used in Filters and Queries. Examples include "Settlement Note", "Case Note", "Note of Telephone Conversation", etc.

- Author. Select the Author from the list box. The Author is the person on whose behalf the Note is being written. (An Author must be designated as a member of your firm's Staff on the Properties tab of the Author's Entity record.) See Setting Properties for Staff and Users. The person creating the Note can select any Personnel member as the Author of the Note.

- Locked. Checking this option prohibits all users, other than you and the Author from editing the Note.

- Private: Checking this option prohibits all users, other than you, the Author, and the System Administrator, from viewing the Note.

Text Entry and Formatting for Notes

The text entry field for a Note is similar to your word-processor and has many of the same formatting features. You also have the ability to time-stamp a Note and every new entry added to a Note.

Text Formatting. The following formatting features are available in a Note:

- **Word-wrap.** Text automatically wraps at the end of a line.
- **Indent.** Use Ctrl + Tab to insert an indent.
- **Text Alignment.** You can align text to the left, to the right or centered. Click on one of the icons listed below and then enter the text. For existing text, highlight the text first:

  Left: 

  Right: 

  Center: 

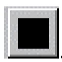
Text Attributes. You can change the type and size of the font and bold, underline and italicize text entered in the Note.

- **Font**. Choose the Font and font size from the list box.

- **Font Color** You have the ability to change the font color for emphasis or for organization. For example, if different staff members enter data in the same notes, individual color codes could be assigned to each person.

To change the font color:

1 Click on the Font Color button . A color selection dialog will appear:

2 Click on a color selection then click **OK**. Any further typing you do in the Note Text box will be in this color.

To change the color of text already typed, simply highlight the selection, hit the Font Color Button, select a color and click **OK**.

- **Boldface, Underline and Italics**. Click the applicable icon before you enter text, or highlight the text and click the icon:

Bold: 

Underline: 

Italics: 

Time-Stamping Notes

You can time-stamp a note with the date and time. If your office uses a single Note to record several items of information, you can time-stamp each entry. To use the time-stamp:

1 Place the cursor where you want the time-stamp to be located.

2 To insert the time-stamp:

- Click on the Time-stamp icon 
- Strike Ctrl+T from the keyboard.

The date, time and initials of the current user will be inserted in the text of the Note.

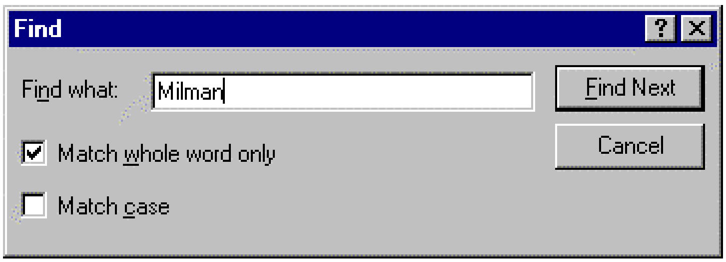
Find and Replace Text

To find text within a note:

1 From the open note,

- Right mouse click in the Note Text box and select **Find** from the menu, or
- Hit Ctrl+F on your keyboard.

A Find dialog will appear:



2 Enter the text you are searching for. If the text you are searching for is an entire word (i.e. it will have spaces on either side), you can click the Match Whole Word Only box to speed your search. If you wish to Match Case, check this box.

3 Enter the text you are searching for. If the text you are searching for is an entire word (i.e. it will have spaces on either side), you can click the Match Whole Word Only box to speed your search. If you wish to Match Case, check this box.

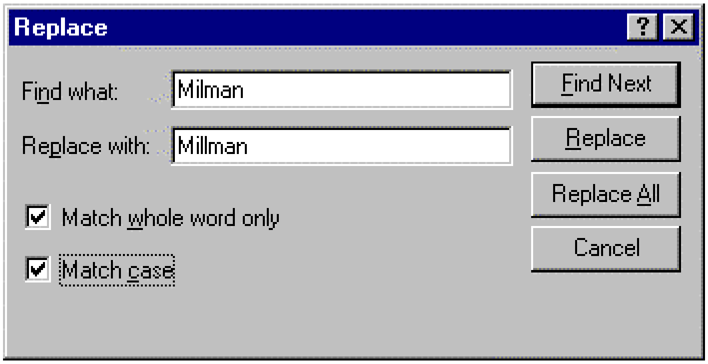
4 Click **Find Next** and the program will locate instances of your entry within the text of this note.

To Replace text within a note:

1 From the open note,

- Right mouse click in the Note Text box and select **Replace** from the menu, or
- Hit Ctrl+H on your keyboard.

A Replace dialog will appear:



2 Enter the text you are searching for in the **Find What** field and the text you wish to replace it with in the **Replace with** field. If the text you are searching for is an entire word (i.e. it will have spaces on either side), you can click the **Match Whole Word Only** box to speed your search. If you wish to **Match Case**, check this box. If part of your replace operation entails changing case, you must check this box.

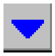
3 Click **Find Next** and Practice Manager will highlight the first instance of Text found. Hit the **Replace** button to replace it. Hitting **Find Next** again will take you to the next instance. You can continue find and replace each individual instance in this way, or you can hit the **Replace All** button to automatically replace all instances throughout the text of this note.

Save the Note

After you have finished composing or editing the Note, click **Save** on the Speedbar. If you do not wish to save, simply click **Close** and respond **No** to the prompt "**Do you want to save the note?**"

Scroll through Notes

You can scroll through open Note records without returning to the listing if you wish:

- Select  on the speedbar to go the next note in the listing
- Select  on the speedbar to go to the previous note in the listing.

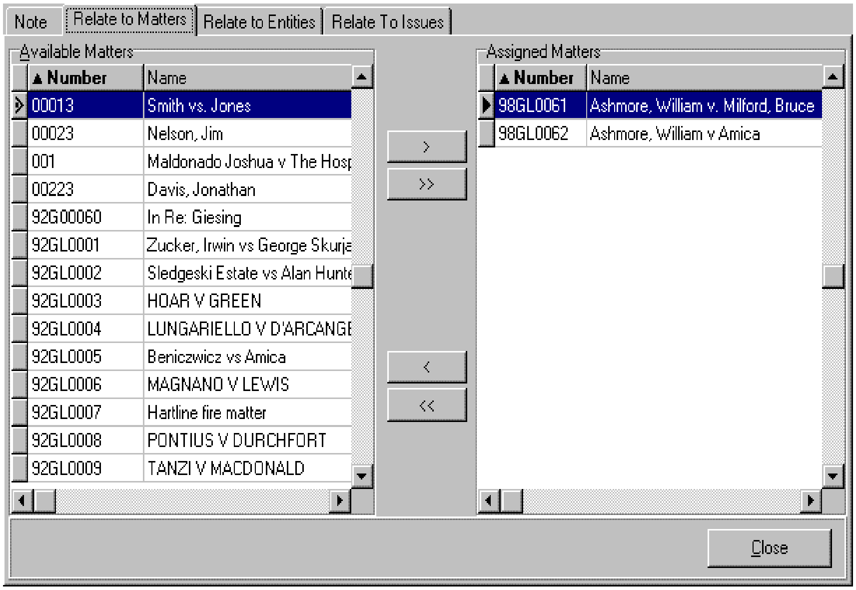
Relating Notes to Issues, Entities and Matters

When you create a Note, you can relate—or assign—the Note to one or more Entities, Matters and Issues. To assign a Note, it must be open for Editing. See View and Edit Notes.

Relating a Note to Matters

When you relate—or assign—a Note to one or more Matters, it will appear in the Note Listing for each of the Matters to which it has been assigned, as well as in the Note Listing on the Matter's Tree View tab. This is useful where information being recorded in one Matter is of some use or significance to other Matters. In class action litigation, for instance, information recorded in a Note in the Matter regarding a particular Client could easily be recorded in the Matter for the class action itself. To relate or assign a Note to one or more other Matters:

1. Open the Note.
2. Click on the **Relate to Matters** tab. The Relate to Matters screen will be displayed.



3 Using this Pick-List, select the Matters to assign to the Note.

- To select a single Matter, highlight it in the Available Matters pane and click the Assign .button.
- To select a group of Matters, hold down the Ctrl key, click on each Matter you want to select and then, after releasing the Ctrl key, click the Assing button.
- To select all Matters displayed in the Available Matters list, click on the Assign All button.

The Matters to which the Note has been assigned will now appear in the right pane of the Pick-List under **Assigned Matters**.

4 You can remove Matters from the Assigned Matters list if need be.

- To remove a single Matter from the list, highlight it and click the Unassign button.
- To remove all Matters from the list, click on the Unassign All button.

The Matters that have been unassigned will now appear in the left pane of the Pick-List.

5 Click on **Close** to close the Pick-List.

Relating a Note to Entities

When you assign a Note to one or more Entities, it will appear in the Entity Note Listing for each of the Entities to which it has been assigned, as well as in the Note Listing on the Entity's Tree View tab. The process of assigning a Note to Entities is exactly the same as assigning a Note to Matters.

1 Open the Note.

2 Click on the **Relate to Entities** tab. The Relate to Entities screen will be displayed.

3 Select the Entities from the Available Entities list on the left and move them to the Assigned Entities list on the right. This process is the same as the one described above for matters.

4 Click on **Close** to close the Pick-List.

Relating a Note to Issues

When you assign a Note to one or more Issues, the Note will appear in the Note Listing for each of the Issues to which it has been linked. This will help you organize your case around issues, showing all relevant notes at a glance. The process of assigning a Note to Issues is the same as assigning a Note to Matters or Entities.

1 Open the Note.

2 Click on the **Relate to Issues** tab. The Relate to Issues screen will be displayed.

3 Select the Issues from the Available Issues list on the left and move them to the Assigned Issues list on the right. This process is the same as the one described above for Matters.

4 Click on **Close** to close the Pick-List.

Sending a Note as an E-Mail or Task

After completing the text of a Note, you can include it in a GroupWare E-mail or Task. To do so:

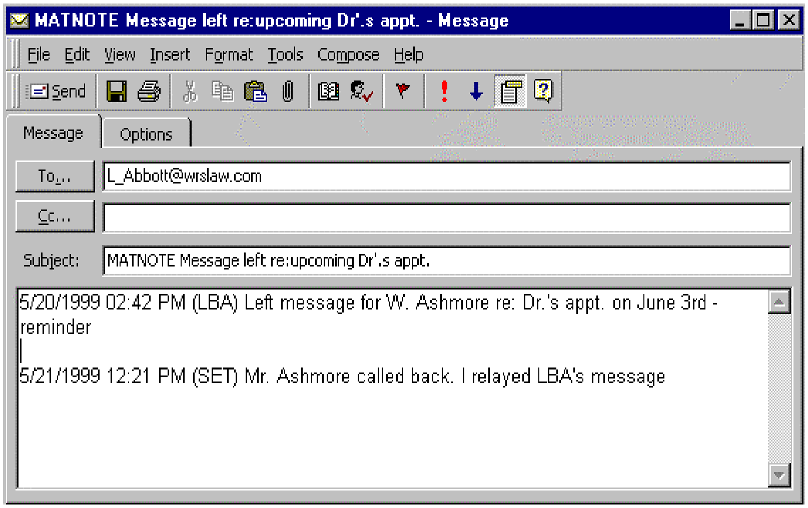
1 Either create a new Note or open an existing Note.

2 Click the **Send** button on the Note Speedbar. A menu will display.

3 Make a selection:

- Click **E-Mail** to start an E-mail
- Click **Groupware Task** to initiate a Task in your GroupWare application
- Click **Groupware Appointment** to initiate an appointment using your Groupware application
- Click **Workflow Task** to create a task in Workflow
- Click **Workflow Appointment** to create an appointment in Workflow.

A new email, task or appointment screen will display. If you are utilizing your groupware program, the entire contents of the note will be automatically inserted in your message. If you wish, you can edit or add to this.



Above is an example of an email message that has been automatically created using this feature. Subject line and text was all copied in automatically for the sender. In this illustration, a staff member with the initials SET, has handled a return call from Mr. Ashmore by reading and updating a note left by L. Abbott who is then notified via this email with the click of the **Send** button.

4 Send the email or task message.

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Using Issues

Overview of Issues

The Issues Module gives you a way to organize information entered into the Practice Manager database around the central factual or legal issues, concepts, concerns, goals or principals involved in a Matter. For every Matter opened, Practice Manager allows you to select or create one or more Issues applicable to the Matter. Once created, any of the Issues can be assigned to Entities and other information stored in a Matter:

- **Entities**. Issues are assigned to Entities from the Issues Assignment screen in the Matter.
- **Notes**. Issues are assigned to a Note from the Note itself.
- **Documents.** Issues are assigned to Documents from a Document Profile.
- **Annotations.** When you create an annotation in a scanned image or document you can assign an Issue to it.

All Issues created in a Matter can be viewed from the Matter Issue Listing, accessed from the Issues tab. The Matter Issue Listing can be filtered, sorted, searched and printed like other listings in Practice Manager. When you open an Issue, you can view lists of the Entities, Notes, Documents and Annotations assigned to that Issue at a glance. From these lists, you can open any of the individual records themselves to view complete information. In this way, all information supporting an issue you are building is gathered together in one place, helping you organize a case.

Using the Issue Listing

All Issues that have been selected or created in a Matter will appear on the Issue Listing. Since Issues relate to specific Matters, there is no General Issue Listing. To help you locate Issues, you can sort Issues alphabetically, Filter the Issue Listing to limit the records displayed or use the QuickSearch Window to find a particular record. You can also change the number, size and order of the columns displayed on the Issue Listing.

Displaying the Issue Listing

To display the Issue Listing for a particular Matter:

1. Open an existing Matter.
2. Click the **Issue** tab.

   The Issue Listing will be displayed

Functions You Can Access from the Issue Listing

Most of the functions relating to Issues can be accessed from the Issue Listing. These functions are discussed in separate topics:

- To select or create an Issue for the Matter, see Selecting and Creating Issues.
- To assign Issues to Entities, see Assigning Issues to Entities.
- To assign Issues to Notes, see Assigning Issues to Notes.
- To assign Issues to Documents, including scanned images, see Assigning Issues to Documents.
- To view the Notes, Documents, Entities and Annotations related to a particular Issue, see View Issue Relationships.
- To modify or delete an Issue, see Modifying and Deleting Issues.

Working with the Issue Listing

Since the Issue Listing will usually contain only a few Issues, it is unlikely that you will need to Filter the Issue Listing or use the QuickSearch Window to locate an Issue. It is also unlikely that you will have occasion to change the default sort order of the Issue Listing or change the Issue Listing Layout. If you decide to use these features or change the Issue Listing, you can consult the general topics on these subjects:

- Customizing the Listing Layout.
- Sorting Listings.
- Searching for Records in Listings.
- Creating Filters to Select Records.

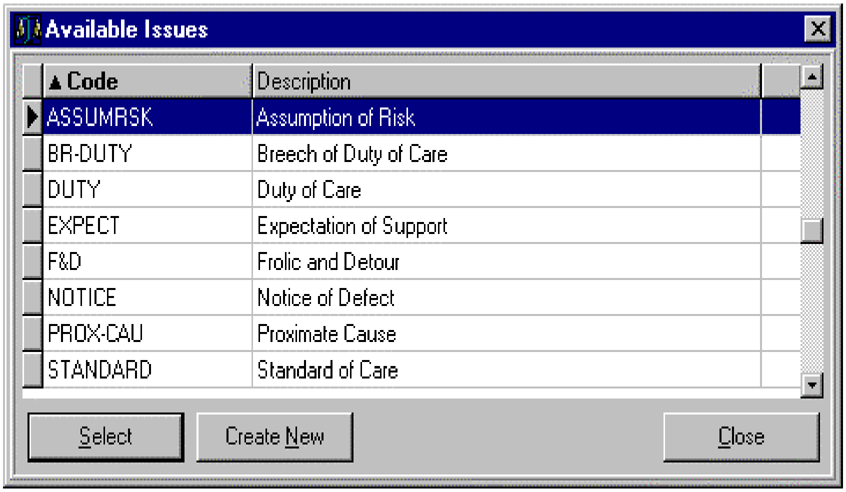
Selecting and Creating Issues

For each Matter, you can create a list of Issues that will be applicable to that Matter alone. The Issues list for the Matter is derived from two sources: the Issues that have been created and associated with the Law Type assigned to the Matter and Issues that are created specifically for that Matter. There are several places in a Matter where you can select or create Issues—in a Document Profile or at the Issue Listing. Once selected or created, Issues are automatically added to the Issue Listing. See Using the Issue Listing.

Adding New Issues at the Issue Listing

You will generally add new Issues at the Issue Listing itself. To add an Issue:

1. Display the Issue Listing for the Matter. See Using the Issue Listing.
2. Click **New**. The list of Available Issues list will appear.

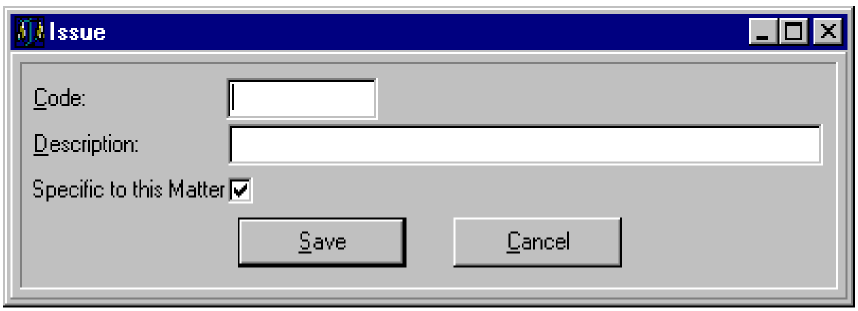


The Available Issues list contains a list of all Issues available for the Law Type assigned to the Matter that is open.

3 To select an Issue from the Available Issues list for inclusion in the Issue Listing for the Matter, highlight the Issue and click **Select**.

- The selected Issue will be added to the Issue Listing and the Available Issues screen will remain open.
- Highlight and select any other Issues you want to include in the Issue Listing in the same way.
- Click **Close** when you are done selecting Issues.

4 If you want to add an Issue to the Issue Listing that is not included in the Available Issues list, click **Create New**. The Issue screen will appear, allowing you to create a new Issue for the Matter.



- Enter a Code for the Issue of up to eight alphanumeric characters.

- Enter a Description of the Issue.
- If you want the Issue to apply only to this Matter, click the **Specific to this Matter** checkbox.

NOTE: If you do not check the checkbox, the Issue will be automatically included in the list of Available Issues for every Matter of the Law Type assigned to the open Matter.

5 Click on **Save** to save the Issue and close the Issue screen; click on **Cancel** to close the Issue screen without saving the Issue.

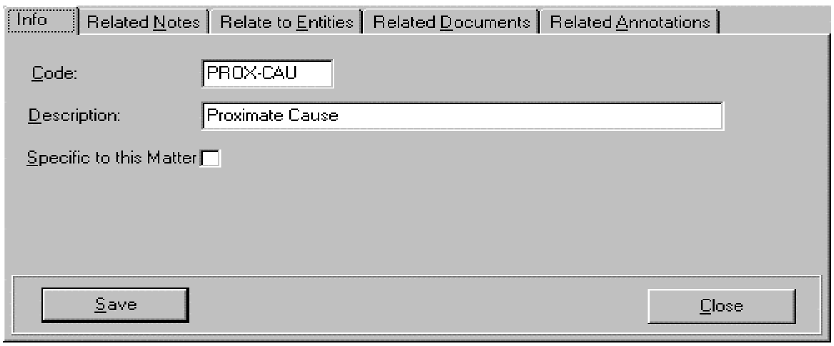
View Issue Relationships

In every Matter, one or more Issues can be assigned to Entities, Notes, incoming and outgoing Documents and Annotations. Once the assignments have been made, you can view these assignments by Issue. In other words, you can see what Notes, Entities and Documents and Annotations relate to a specific Issue. You view these relationships when you "Open" the Issue in question.

To View Issue Relationships

1 Open an existing Matter and click on the **Issue** tab.

2 Highlight the Issue you wish to view and hit the **Open** button on the speed bar or simply double-click on the issue. The Issue Screen appears.



3 Click on the tabs at the top of the screen to view lists of the records relating to that Issue.

- Click the **Related Notes** tab to display a listing of all Notes involving that Issue. From the listing, you will be able to view or modify the Note and access any other features available from the Note Listings. See What You Can Do From the Notes Listing?

- Click the **Relate to Entities** tab to display a list of all Entities related to that Issue.

- Click the **Related Documents** tab to display a list of all profiled documents that relate to that Issue. From the listing, you will be able to view or modify the Document and access any other features available from the Document Listings. See Uses of the Document Listing.

- Click the **Related Annotations** tab to display a list of related annotations. This listing will be active only if your administrator has created an annotation form that includes an issue field. For example, an annotation record created for use with documents might highlight passages applicable to certain issues.

Assigning Issues to Entities

You can relate one or more Entities to one or more Issues in a Matter. Entities are related to an Issue from the Issue Listing in a Matter. To assign Entities to an Issue:

To display the Issue Listing for a particular Matter:

1. Open an existing Matter.
2. Click the **Issue** tab.
3. The Issue Listing will be displayed.
4. Highlight the Issue you wish to view and click **Open** or double-click.
5. The Issue Screen will display.
6. Click on Relate to Entities.
7. Select the Entities that will be assigned to the Issue.

   - To select a single Entity, highlight it in the Available Entities pane of the Pick-List and click the Assign Button.

   - To select all Entities, click on the Assign All button.

- To remove a single Entity from the list, highlight it in the Available Entities list and click the Unassign ‹ button.
- To remove all Entities from the list, click on the Unassign All ‹‹ button.

Assigning Issues to Notes

Issues are assigned to a specific Note at the time the Note is created. See Relating Notes to Issues, Entities and Matters. All of the Notes assigned to a particular Issue can be viewed from the Issue Listing. See View Issue Relationships.

Modifying and Deleting Issues

You can modify or delete Notes from the Issues Listing within a particular Matter.

To modify an issue

1. Open an existing Matter.
2. Click the **Issue** tab. The Issue Listing appears.
3. Highlight the Issue you want to modify and click **Open**. The Issue Information screen appears.
4. Make the desired changes.
5. Click **Save** to save the modifications and close the Issue Information screen.

To delete an issue

1. Open an existing Matter.
2. Click the Issue tab. The Issue Listing appears.
3. Highlight the Note to be deleted and Hit Ctrl + D
4. Select **File** and then select **Delete** from the Practice Manager Menu.

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Using Workflow

Overview

Workflow refers to the process by which the members of an organization attain the organization's goals and objectives. In the context of a law firm or law department, it usually encompasses the scheduling of appointments and court appearances and the assignment and delegation of tasks, such as drafting documents required to meet a Client's needs, often within deadlines that must be carefully tracked. Practice Manager includes several tools designed to help you schedule, monitor and automate the critical events and tasks that comprise the workflow process in a law office.

- **Scheduling Workflow Activities**. Practice Manager tracks by Matter all Workflow Activities in five categories—*Appointments* and *Court Events*, including meetings, depositions, trials and court hearings; *Critical Dates*, including deadlines and other important dates, such as statutes of limitation and filing deadlines; *Phone Calls*, your reminders to make telephone calls or attend telephone conferences; and *Tasks*. See Scheduling Workflow Activities--Overview.

- **Advanced Features and Options.** Workflow Activities have several advanced features that help you manage your workflow:

  - **Classification.** Every Workflow Activity is given a specific priority and included in a specific Activity Type. The priorities are color-coded when displayed on the Workflow Calendars.

  - **Staff and Party Assignments.** Every Workflow Activity is assigned to one or more staff members in the capacity of "Responsible", "Notify Only" (receives notification but not responsible) and "Assigned By" (indicates the person who delegated or assigned the Activity). Third-party Players can also be assigned to Workflow Activities and those Activities can be tracked in their Addressbook records.

- **Postponements and Repeat Appointments.** Any Workflow Activity can be postponed and a detailed record of the postponement is maintained automatically. Workflow Activities can be repeated at virtually any interval and as many times as you choose.

- **Linked Actions and Activities**. When you create a primary Workflow Activity, you can create other Workflow Activities that are linked to it at the same time and schedule their Due or Event Dates automatically. Thus, for instance, when you schedule a Deposition, you could schedule all of the tasks relating to the deposition at the same time, such as notifying the court reporter or sending out a notice of deposition. You can also link Workflow Actions to Workflow Activities. Workflow Actions are Templates that automatically activate features of Practice Manager or your GroupWare program when they are "executed". Thus, on the date set to notify the court reporter, you could execute a Workflow Action to send out an e-mail or automatically generate a letter to the court reporter.

- **Automatic Scheduling.** With automatic scheduling, you can automatically schedule the Due Date or Event Date of a Workflow Activity for the same day, or a certain period of time after the date it is created; the date another Workflow Activity is created, is scheduled to occur or actually is marked completed; or a specified period of time before or after a date field in a Matter.

- **Ticklers and Overdue Lists.** You can set Ticklers for a Workflow Activity. A Tickler shows up on a special Tickler list on the Workflow Calendars at designated intervals to alert you in advance of the Due Date or Event Date of an impending Workflow Activity. After the Due or Event Date of a Workflow Activity, the Activity automatically appears on the "Overdue" list, until the Activity and any associated Actions are expressly marked completed.

♦ **Workflow Listing, Calendar and Tickler.** All Workflow Activities that are scheduled can be displayed on Workflow Listings or the Workflow Calendars. Like other modules in Practice Manager, there are actually two Workflow Listings: the Global Workflow Listing displays tasks and events for all Matters; the Matter Workflow Listing includes only workflow Activities for that Matter. Using QuickFilters, User-defined Filters and Queries, you can display Workflow Activity records on the Workflow Listings which provide you exactly the information you need to maintain control over your work—all of your appointments and tasks, the court docket for a particular case, statutes of limitations, discovery deadlines, the weekly court calendar, depositions and even personal appointments. Filtered Listings can be printed as reports. Whatever information is displayed on the Workflow Listings will also appear on the Workflow Calendars—the global Workflow Calendar, which encompasses all Matters and the Matter Workflow Calendar, which encompasses Workflow Activities in specific Matters. The Workflow Calendars also include a tickler system that reminds you in advance of all upcoming Workflow Activities. See Workflow Calendars and Listings--Overview.

♦ **Workflow Templates and Linked Actions.** You have the option to use a Workflow Template when scheduling a Workflow Activity. A Workflow Template is a Workflow Activity record that has been filled out in advance. With this option enabled, you are given the opportunity to select a Workflow Template from a list, when you create a new Workflow Activity record. Since Workflow Templates can include almost all of the features of a Workflow Activity record, by using a Workflow Template, you can automatically:

- Enter the details of the Workflow Activity, such as the description, time, priority, location, and tickler details.
- Assign staff to the Workflow Activity and assign the Workflow Activity to one or more other third-parties.
- Schedule several Workflow Activities at the same time by including Linked Activities.
- Link one or more Workflow Actions to a Workflow Activity by including Linked Workflow Actions.

See Using Workflow Activity Templates.

♦ **Workflow Plans.** When you create a Workflow Activity that includes Linked Activities or Actions, the result is a type of ad-hoc Workflow Plan. Practice Manager also allows you to create detailed Workflow Plans in advance and then retrieve one or more of them onto the Workflow Plan screen in a Matter. A Workflow Plan presents a graphical representation in a Windows Explorer-type format of a series of Workflow Activities, Actions, Questions and Answers. Using Advanced Scheduling techniques, Workflow Activities can be scheduled automatically based upon several dates: (1) the date the Workflow Plan is first retrieved into the Matter; (2) a date in the Matter, such as the date a file is opened; (3) the date another Workflow Activity is activated; (4)

the date another Workflow Activity is scheduled to occur; or (5) the date another Workflow Activity is actually marked completed. Workflow Actions, assigned to Workflow Activities, allow you to use Practice Manager's automated functions to do the "work" outlined in the Plan. Workflow Questions and Answers are included in a Workflow Plan to present alternative courses of action that inevitably occur in a Matter. The "Answers" to a Workflow Question represent the different options that are available. Workflow Activities, Workflow Actions and other Workflow Questions linked to a particular Answer can be activated when a particular Answer is selected. As you execute and mark complete the Workflow Activities and associated Actions, the progress you made is shown on the Plan. See Overview of Workflow Plans.

- **Integration with GroupWare.** The Workflow module and the GroupWare module of Practice Manager operate independently and you can schedule Tasks, Appointments and, to a lesser extent, Critical Dates, in your GroupWare application as well as the Workflow module. However, GroupWare can be linked to a Workflow Activity through Workflow Actions, that can be used to schedule and send a GroupWare Item, such as an E-mail, a Note or a Task. Since the Practice Manager Workflow module was designed specifically to meet the needs of lawyers, we anticipate that you will use the Workflow module as the primary means for managing the workflow in your office and supplement its capabilities, as needed, using the messaging features of your GroupWare application.

Scheduling Workflow Activities - Overview

Categories of Workflow Activities

Practice Manager divides all workflow activity into five categories: Critical Dates, Appointments, Court Events, Phone Calls and Tasks.

- **Appointments** – The meetings and appointments you attend with other people, other than those that take place before a tribunal. Normally, appointments have specific dates, times and locations. See Scheduling an Appointment.

- **Court Event** – An appointment that takes place under the auspices of a Court or other tribunal. When you schedule a Court Event, you can include the Judge and Jurisdiction on the Workflow Activity record.

- **Critical Dates –** A Critical Date is a deadline or other event which has significance to a Matter, but does not occur at a specific time or require the participation of personnel or third-parties to take place. Two of the most common types of Critical Dates are statutes of limitation and court-imposed deadlines. A Critical Date appears on your Workflow Calendar on the date it is scheduled to occur. The Workflow Tickler gives you advance warning that it will be taking place.

- **Tasks –** A Task is the concrete work which must be performed to accomplish your objectives in a Matter—such as preparing a document, sending out a letter, filing a pleading, or doing a title search. When scheduling a Task, you will specify the Task's Due Date—the date you propose for completing the task. Tasks will often be scheduled in conjunction with a Critical Date. In many cases a Critical Date will be the deadline for a Task; the Task's Due Date—the proposed completion date—will be a date prior to the Critical Date to ensure that you complete the Task on time. The Task will appear on your Workflow Calendar on the Due Date. The Task will appear in the Tickler on your Workflow Calendar a specified number of days in advance of the Due Date.

- **Phone Calls** – A reminder to place a phone call or to participate in a conference call. Like a Task, a Phone Call will appear on your Calendar on its Due Date. Like an Appointment, you have the option to schedule a Phone Call at a specific time and to specify the parties you intend to include in the call. An icon on the Phone Call Activity screen activates the Phone Call module, giving you instant access to telephone numbers of the party you intend to call, an auto-dialer and place to record the details of your call.

Creating a New Workflow Activity

You can create a new Workflow Activity from the Workflow Listings, the Workflow Calendar, a Workflow Plan or the Practice Manager Main Menu. See Creating a New Workflow Activity. After you have started a new Workflow Activity, these are the steps you will follow:

- **Select a Workflow Activity Template.** Unless you have disabled this option, you will select a Workflow Activity Template, which will fill out many of the details of the Workflow Activity for you.

- **Complete the Workflow Activity Screen.** Fill out the fields on the Workflow Activity screen.

- **Assign Players to the Workflow Activity**. Assign personnel and third-parties to the Workflow Activity.
- **Use Automatic Scheduling.** If you want, calculate the Due Date or Event Date of the Workflow Activity based upon the Activity Date of another Workflow Activity or a date in the Matter.
- **Link Workflow Activities and Actions.** If you want, link other Workflow Activities and Workflow Actions to the current Workflow Activity.

Modifying a Workflow Activity Record

You can modify the fields in a Workflow Activity that has been scheduled from the Workflow Listings, the Workflow Calendars or a Workflow Plan. If you want to change the Activity Date of a Workflow Activity, you can either modify the Activity Date of the original Workflow Activity, or enter a formal postponement using the Postponement function. See Postponing Workflow Activities. Unless you enter a formal postponement, there will be no record of the previously scheduled Workflow Activity or the reason for the postponement.

From the Workflow Listings

You can modify a Workflow Activity from the Global Workflow Listing or the Matter Workflow Listing. The Global Workflow Listing lists all Workflow Activities that have been scheduled for all Matters. The Matter Workflow Listing lists all Workflow Activities that have been scheduled for a single Matter.

1. Display the Global Workflow Listing or the Matter Workflow Listing. See Displaying Workflow Listings and Calendars.
2. Locate and highlight the Workflow Activity you wish to modify.
3. You can use a Filter to limit the number of Workflow Activities, see Filtering Workflow Activity Records, or use the QuickSearch Window to find the Workflow record, see Searching the Workflow Listings.
4. Click **Open** to open the Workflow Activity for editing.
5. The applicable Workflow screen will appear.
6. Make any desired changes to the Workflow Activity.

7 Click **Save** to save the changes and close the Workflow Activity.

From the Workflow Calendar

You can also modify a Workflow Activity from the Global Workflow Calendar or the Matter Workflow Calendar. The Global Workflow Calendar displays in calendar format all of the Workflow Activities listed on the corresponding Workflow Listing. The Matter Workflow Calendar displays in calendar format all of the Workflow Activities listed on the corresponding Workflow Listing for a particular Matter.

1 Display the Global Workflow Listing or the Matter WorkflowListing. See Displaying Workflow Listings and Calendars.

2 Choose which view of the calendar you want to display by clicking the appropriate button. Your choices are "Month", "Week" or "Day".

3 Highlight the Workflow Activity you want to modify.

4 To open the Workflow Activity for editing:

- Double-click on the highlighted Activity
- Select **Open** from the menu.

The applicable Workflow screen will be displayed.

5 Make any desired changes to the Workflow Activity.

6 Click **Save** to save the changes and close the Workflow Activity or **Cancel** to close the Workflow Activity without saving the changes.

From a Workflow Plan

You can modify any Workflow Activity that has been scheduled as part of a Workflow Plan.

1 Open an existing Matter.

2 Click on the Workflow tab.

3 Click on the Plan tab at the bottom of the screen. The Workflow Plan screen will appear.

4 Highlight the Workflow Activity you want to modify. You can also open and modify a Workflow Activity displayed in the Tickler, Overdue or Unscheduled branches of a Workflow Calendar.

5 To open the Workflow Activity:

- Double-click on the Workflow Activity
- Display the Plan Menu and click **Edit**.

The applicable Workflow screen will appear.

6 Make any desired changes to the Workflow Activity.

7 Click **Save** to save the changes and close the Workflow Activity or click **Cancel** to close the Workflow Activity without saving the changes.

Deleting a Workflow Activity

You can delete a Workflow Activity from the Workflow Listings, the Workflow Calendars or a Workflow Plan. To delete Workflow Activities from a Workflow Plan, see Adding Workflow Activities to a Plan.

From the Workflow Listings

You can delete Workflow Activities from the Global Workflow Listing or the Matter Workflow Listing.

1 Display the Global Workflow Listing or the Matter Workflow Listing. See Displaying Workflow Listings and Calendars.

2 Locate and highlight the Workflow Activity you wish to delete. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Workflow Activities displayed, see Filtering Workflow Activity Records, or use the QuickSearch Window to find the Workflow record, see Searching the Workflow Listings.

3 To delete the Workflow Activity:

- Press Ctrl + D
- Select **File** and then select **Delete** from the Practice Manager Main Menu.

From the Workflow Calendar

You can also delete Workflow Activities from the Global Workflow Calendar or the Matter Workflow Calendar.

1 Display the Global Workflow Listing or the Matter Workflow Listing. See Displaying Workflow Listings and Calendars.

2 Select **Calendar** from the View Menu.

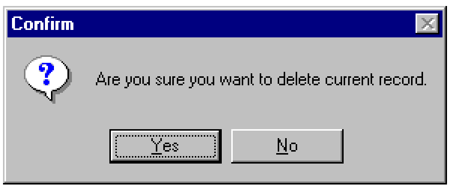
3 Choose which view of the calendar you want to display by clicking the appropriate radio button. Your choices are “Month”, “Week” or “Day”.

4 Highlight the Workflow Activity you want to delete. You cannot delete Ticklers. When you delete a Workflow Activity, all Ticklers relating to that Activity will be automatically deleted.

5 To delete the Workflow Activity:

- Press the **Delete** key
- Click the Right Mouse Button and select **Delete** from the menu that displays.

A dialog will appear, requesting you to confirm the deletion.



Click **Yes** to confirm the deletion; click **No** to cancel the deletion.

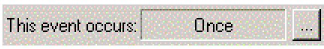
Repeating Workflow Activities

You can schedule any type of Workflow Activity to recur any number of times at whatever interval you choose. This is done at the time the Workflow Activity is created, using the Repeat button located on the Workflow Activity screen. You can use Repeating Workflow Activities, for instance, to schedule meetings that occur over a period of several days; or to schedule office meetings that occur on the same day each month.

Scheduling a Repeating Workflow Activity

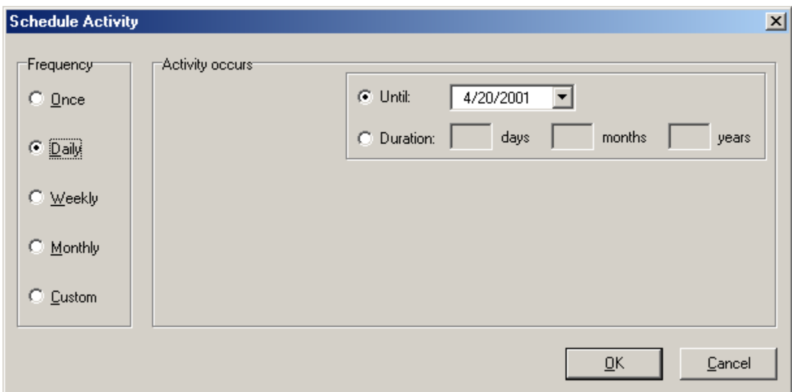
To schedule a Repeating Workflow Activity.

1 Create a new Workflow Activity. Click the **Repeat** button ... on the Workflow Activity screen.



2 Choose the frequency of the Workflow Activity by placing a check in the appropriate checkbox. Your choices are Daily, Weekly, Monthly or Custom.

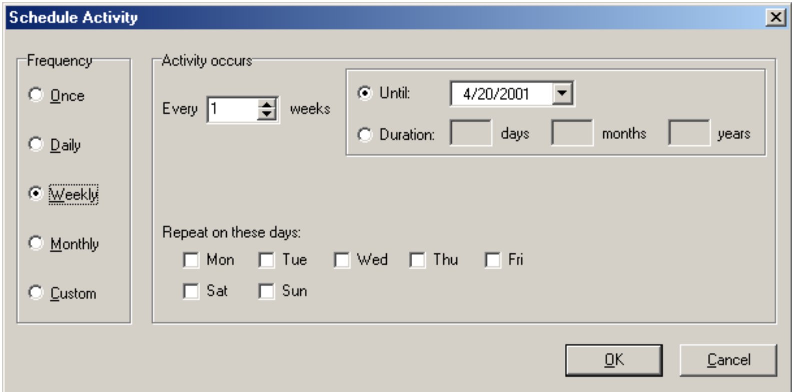
Daily. To schedule a Workflow Activity on a daily basis:



- Check the “Until” radio button and enter the last date it will take place

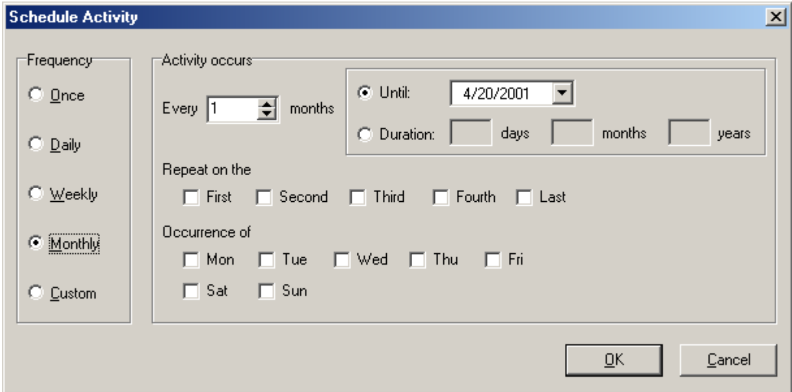
- Check the "Duration" radio and enter the number of days, months and/or years the Workflow Activity will recur on a daily basis.
-

Weekly. To repeat a Workflow Activity on a weekly basis:



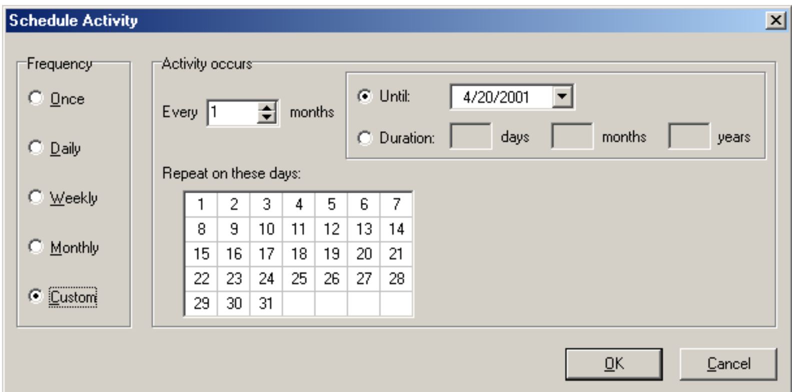
- Enter the weekly interval between repetitions of the Activity in the "Every" field.
- If you want the Activity to be repeated on more than one day of the week during this interval, place checkboxes next to the applicable days.
- Indicate how long the Workflow Activity will be repeated either by specifying a termination date or number of days, months and/or years.
-

Monthly. To repeat a Workflow Activity on a monthly basis:



- Enter the monthly interval between repetitions of the Activity in the "Every" field.
- If you want the Activity to be repeated on more than one day of the month during this interval, place checkboxes next to the applicable days.
- Indicate how long the Workflow Activity will be repeated either by specifying a termination date or number of days, months and/or years.
•

Custom. The Custom settings allow you to select the specific days within the month on which you want to repeat an Activity:



- Enter the monthly interval between repetitions of the Activity in the "Every" field.

- Click on the specific days of the month on which you want the Activity to be repeated.
- Indicate how long the Workflow Activity will be repeated either by specifying a termination date or number of days, months and/or years.

Workflow Reports

The Workflow Listing can be used to create a wide variety of schedules and reports for your office. You can create reports for specific Matters, such as tasks or discovery deadlines, or Matter-wide reports, such as a list of all appointments or court dates for the office, a particular attorney or a department.

The columns you select for the Workflow Listing layout are used for the columns of the report; the Sort Field is used to order the records in the layout; and Workflow Listing filters are used to select the records for the report. The resulting list of records can be viewed, printed or saved in a file. Whatever records you display in a Workflow Listing can also be viewed in the Workflow Calendar, which can be printed in the Day, Week or Month views.

Creating Workflow Listing Reports

To create a report or schedule based upon a Workflow Listing:

1. **Select Records.** Use a QuickFilter, User-defined Filter or Query to select the Workflow Activities that will comprise the report. See Filter the Workflow Listing.
2. **Create a Layout.** Modify the columns in the Workflow Listing layout to display the fields you want to be included in the report. See Changing the Workflow Listing Layout.
3. **Sort the Records.** Choose the field to be used to sort the records. See Sorting Workflow Listings.
4. **Print the Report.** You will be able to name the report and print it to the screen, the printer or a file.

For detailed information on printing Listings, see Printing Listings. Listings printed to a file can be edited in your word-processor.

Printing Calendar Reports

To print a Calendar Report:

1. Select the records you would like to display on the Calendar.
2. Any Filters or Queries that are in effect on the Workflow Listings will remain in effect on the Workflow Calendars, until they are changed. You can use QuickFilters located on the View Menu, a User-defined Filter or a Query to change the range of Workflow records displayed on the Calendars.
3. Display the View of the Calendar you want to print. See Displaying Workflow Listings and Calendars.
4. To print the Calendar:
   - Select the Print icon from the Practice Manager Toolbar
   - Select **File** and then **Print** and then select **Printer** from the Practice Manager Menu.
5. Choose Printing options.
   - Select **Print Ticklers**, if you want the list Ticklers to be printed on the Calendar.
   - Select "One or several pages, word wrap", if you want the entire text of all Calendar entries to be printed on the Calendar report, regardless of the number of pages it will take.
   - Select "One page, no word wrap" to print a single line for each Workflow Activity on a single page.
   - At your option, select a different font from the one that is displayed by default.

Scheduling a Workflow Activity

You can schedule a new Workflow Activity—Appointment, Court Event, Critical Date, Task or Phone Call—from the Workflow Listings, the Workflow Calendar, a Workflow Plan or the Practice Manager Main Menu.

From the Workflow Listings

You can schedule a Workflow Activity from the Global Workflow Listing or the Matter Workflow Listing. The Global Workflow Listing lists all Workflow Activities that have been scheduled for all Matters. The Matter Workflow Listing lists all Workflow Activities that have been scheduled for a single Matter. To schedule a new Workflow Activity from the Workflow Listings:

1 Display the Global Workflow Listing or the Matter Workflow Listing. See Displaying Workflow Listings.

2 Select **New**. A small drop-down list will appear.

3 Choose the type of Workflow Activity you wish to schedule.

4 To complete the Workflow Activity, follow the instructions in “Completing the Workflow Activity” below.

From the Workflow Calendar

1 You can schedule a Workflow Activity from the Global Workflow Calendar or the Matter Workflow Calendar. The Global Workflow Calendar displays in calendar format all of the Workflow Activities listed on the Global Workflow Listing. The Matter Workflow Calendar displays in calendar format all of the Workflow Activities listed on the corresponding Workflow Listing for a particular Matter. To schedule a new Workflow Activity from the Workflow Calendar:Display the global Workflow Calendar or the Matter Workflow Calendar. See Displaying Workflow Listings and Calendars.

2 Choose which view of the calendar you want to display by clicking the appropriate command button at the top of the Calendar.

Your choices are “Month”, “Week” or “Day ”.

3 From the View Menu, select **New**. To display the View Menu:

- Place the Mouse pointer anywhere on the calendar and click the Right Mouse Button
- Select View from the Practice Manager Main Menu.

A small drop-down list will appear.

4 Choose the type of Workflow Activity you wish to schedule.

5 To complete the Workflow Activity, follow the instructions in “Completing the Workflow Activity” below.

From a Workflow Plan

For each Matter, you can create one or more Workflow Plans. Workflow Plans give you a graphical representation of all Workflow Activities and Workflow Actions scheduled in a particular Matter. If you elect to create Workflow Plans for a Matter, you can create Workflow Activities from the Workflow Plan. To schedule a new Workflow Activity from the Workflow Plan:

1 Open an existing Matter.

2 Click on the **Workflow** tab.

3 Click on the **Plan** tab at the bottom of the screen.

4 The Workflow Plan screen appears.

5 Click on the “branch” of the plan tree where you want to insert the Workflow Activity.

6 For more assistance on determining where to insert the Workflow Activity, see Adding Workflow Activities to a Plan.

7 Use the Right Mouse Button to display the **Plan Menu**.

8 Choose the type of Workflow Activity you wish to schedule—Task, Appointment, Court Event, Critical Date or Phone Call.

9 To complete the Workflow Activity, follow the instructions in "Completing the Workflow Activity" below.

Completing the Workflow Activity

After choosing the appropriate type of Workflow Activity, you will have to:

10 Choose a Workflow Template to fill out the Workflow Activity Screen. For more information on using Workflow Templates, see Using Workflow Activity Templates.

11 Complete the fields on the Workflow Activity Screen that are common to all Workflow Activities. See Completing the Workflow Activity Screen.

12 Fill out the remaining fields on the Workflow Activity screen, including advanced features, such as Automatic Scheduling, Linked Activities and Actions, Repeating Activities and Options:

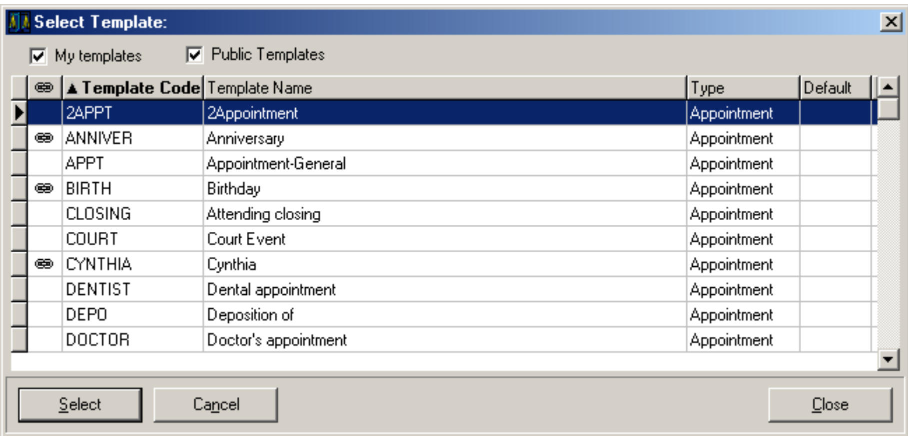
- For Appointments, see Scheduling an Appointment.
- For Court Events, see Scheduling a Court Event.
- For Tasks, see Scheduling a Task.
- For Phone Calls, see Scheduling a Phone Call.
- For Critical Dates, see Scheduling a Critical Date.

Using Workflow Activity Templates

When scheduling a Workflow Activity, by default a list of Workflow Templates will appear after you choose the type of Workflow Activity you want to create. When you select a Workflow Template from the list, the information contained in the Template will automatically fill out certain of the fields in the new Workflow Activity. If you do not wish to use Workflow Templates to create Workflow Activities, you can disable this feature in the Workflow section of User Preferences by choosing to use a Default Workflow Template, instead of selecting one from the Workflow Template list. Your System Administrator will create a Default Workflow Template for each type of Workflow Activity.

Selecting Workflow Templates

After you have initiated a new Workflow Activity, the list of existing Workflow Templates for that type of activity will appear.



- To select a Template, highlight one of the Templates in the list and click **Select.**
- If you click **Close**, the Template list will close, the Workflow Activity screen will appear and the Default Template will be used automatically.
- If you have rights to create Workflow Templates, Templates you have created will appear in the list. To display those Templates you have created, uncheck the **Public Templates** checkbox.

Using a Default Workflow Template

If you do not want to choose a Workflow Activity Template each time you schedule a Workflow Activity, you can elect to use a Default Workflow Template for each type of Workflow Activity. To do so, you must set an option in Preferences.

To set the Preference to use Default Rules

1. From the Edit Menu, select **Preferences.**
2. Click on the Workflow tab.
3. Place a check in the **Use default workflow emplate** checkbox.
4. Select **Save.**

   The Default Workflow Template for the particular type of Workflow Activity will automatically be used when you schedule a Workflow Activity of that type.

Completing the Workflow Activity Screen

When you initiate a new Workflow Activity, the Workflow Activity screen will appear. Although you will see other tabbed screens that deal with more advanced features, the fields you need to complete most Workflow Activities appear on the Activity screen. After you have completed the Activity screen, you may wish to use advanced features, such as

- **Assigning Players to a Workflow Activity.** To assign Players to the Workflow Activity, other than staff who are "Responsible" for it—staff members who assigned the Activity ("Assigned By" Players), staff who neither assigned, nor have responsibility for, the Activity, but should receive notice of it ("Notify Only" personnel); and third-parties to whom the Activity is related ("Player the Activity is Related To").
- **Automatic Scheduling.** To automatically schedule the Activity Date based upon the Activity Date of another Workflow Activity or a date in the Matter.
- **Linking Activities and Actions.** To link other Workflow Activities and Workflow Actions to the Activity being scheduled.

- **Setting Other Options .**

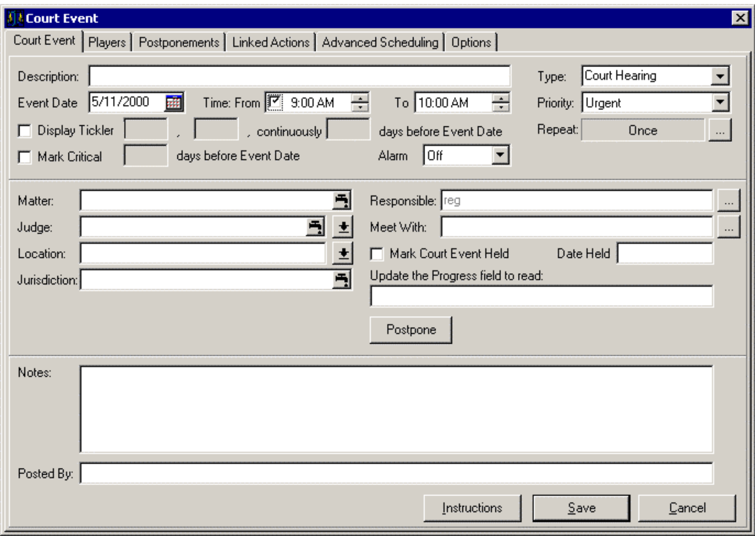
Filling Out the Workflow Activity Screen

If you select a Workflow Activity Template to create a Workflow Activity, many of these fields may already be filled out for you. The Workflow Activity screen includes certain fields that are common to all categories of Workflow Activities, as described below. For details of those fields that are unique to a particular type of Workflow Activity, consult:

- Scheduling a Task.
- Scheduling a Phone Call.
- Scheduling an Appointment.
- Scheduling a Court Event.
- Scheduling a Critical Date

Common Activity Screen Fields

The Court Event screen includes all of the fields that are common to all other types of Workflow Activities.



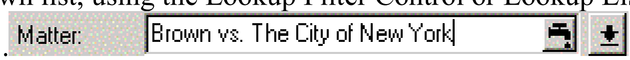
- **Description.** A description of the Workflow Activity.

- **Type.** A classification you have assigned to the Workflow Activity. The Type field can be used in filters and queries to locate Workflow Activities with similar characteristics. Your System Administrator will be responsible to create a list of Workflow Activity Types that meets the reporting needs of your office. For instance, a Workflow Activity Type called "Discovery" could be used to create a list of all Workflow Activities relating to discovery, regardless of whether they represented Tasks, Court Events, Appointments or Critical dates.

- **Date.** The date of the Workflow Activity. For Appointments, Court Events and Critical Dates, it is the date the event will take place. For Tasks, it is the Due Date. For Phone Calls, it is the Due Date, where no time is specified, and the date the call is scheduled to take place if a time is specified. You can type in the date or choose it from the Calendar control. For assistance entering a date, see Entering Dates and Time.

- **Time From and Time To.** The time when the Workflow Activity starts and when you expect it will be concluded. A Task does not include a Time control. For a Phone Call, you have the option of setting a time by clicking on the Time From checkbox. This transforms a Phone Call task into a Phone Call appointment and can be used to schedule a conference call. Practice Manager will automatically enter the Start and End Times into the Workflow Activity screen that you have chosen in Workflow Preferences. See Workflow User Preferences. For assistance entering the time, see Entering Dates and Time.

- **Priority.** Choices are low, normal, high, urgent and critical. High, urgent and critical priorities can be color coded for display on the Workflow Calendars. To change the colors used, see Workflow User Preferences.

- **Matter.** If the Matter is not filled in automatically, select it from the drop-down list, using the Lookup Filter Control or Lookup Listing Control . 

  For an office meeting, it is not necessary to select a Matter

- **Location**. The address where the event will take place. You can type in an address. You can also choose an organization or individual, using one of the lookup controls and the address of the selected player will be inserted automatically.

- **Judge**. For a Court Event, you can choose the judge who will preside from one of the lookup lists. When a judge is selected, you will be asked if you want to copy the address of the judge into the Location field.

- **Jurisdiction**. The Jurisdiction of the tribunal where the Court Event will take place. If a Jurisdiction has been assigned to the Matter, it will be filled in automatically.**Responsible.** The members of your staff who have been assigned responsibility for the Workflow Activity, whatever the term “responsible” means in your office. You can assign multiple staff members as “Responsible” by clicking the icon and selecting them from the Players screen. For instructions on assigning Players from the Players screen, see Assigning Players to a Workflow Activity. When you create a Workflow Activity, Practice Manager will automatically enter the initials of the staff member who you chose as the Default Responsible Entity in Workflow Preferences. See Workflow User Preferences. If a User frequently calendars Workflow Activities for another person, the User should consider changing the Default Responsible Entity to that person. If the Workflow Template used to create the Workflow Activity includes staff members, those individuals will also be assigned to the Workflow Activity automatically.

- **Held.** The control used to “mark” the Workflow Activity “held”. For a Task, the label for this field will be labeled “Completed” and for a Critical Date, it will be labeled “Complied With”.

- **Progress.** The current status of the Workflow Activity can be entered into this field at any time. When the Workflow Activity is marked completed, held or complied with, you will have the option to enter the text that should appear in this field.

- **Postpone this Event.** The control that accesses the screen where you can keep a record of postponements of a Workflow Activity

- **Tickler.** Ticklers appear as entries on the Tickler branch of the Workflow Calendars to remind you in advance of an impending Workflow Activity. You can create up to three Ticklers for each Workflow Activity. The first two Ticklers appear for a single day on your calendar; the third Tickler appears continuously until the Activity Date. You can also set a Mark Critical tickler. On the date a Tickler is marked critical, a time-bomb icon will appear next to the Tickler Activity. See Using Ticklers.

- **Alarm.** For Workflow Activities scheduled for a particular time--Appointments, Court Events and Phone Calls—you can set an alarm that will display a reminder dialog a designated number of minutes before the Activity is scheduled to commence. To turn on the alarm, select "On" from the drop-down list. For more details on Alarms, see Setting Alarms.

- **This Event Occurs….** Gives you access to the controls that allow you to schedule a Workflow Activity any number of times on a daily, weekly, monthly or other basis. For instructions on this feature, see Repeating Workflow Activities.
- **Notes.** Any information about the Appointment you wish to include—references to file Notes; information about participants; or any other detailed information relevant to the Workflow Activity.
- **Instructions.** Instructions to the User relating the subject of the Workflow Activity. If the Workflow Activity Template used to create a Workflow Activity includes instructions, they can be displayed in a separate window by clicking the **Instructions** button. Additional instructions can be added at the time the Workflow Activity is created or at any time thereafter.

Assigning Players to a Workflow Activity

When you schedule a Workflow Activity, you have the option to indicate the Players who are involved in the Activity—members of your staff as well as clients and other third-parties who have an interest in the Activity. This is done by assigning them to the Activity. When you assign a Player, you will choose an appropriate Status for the Player—Responsible, Notify Only, Assigned By, Meet With/Speak With or Player Activity is Related To. You also have the option to assign a description that indicates the Player's Role in the specific Activity. Players who have been assigned to an Activity appear on a list in the Players tab. The list shows the Status and Role of all Players and gives you easy access to addresses and telephone numbers for each Player. Players with the Status of Responsible, Speak With and Meet With can be assigned from the Workflow Activity screen. To assign all other Players, you must first click on the Players tab in the Activity.

Player Status

Each Player will be assigned a Status. Three of the Status choices apply only to personnel—Responsible, Assigned By, and Notify Only.

- **Responsible**. The members of your staff who have been assigned responsibility for the Workflow Activity. By default, Practice Manager displays the Workflow Activities of personnel assigned as Responsible on the Workflow Listings and the Workflow Calendars.

- **Assigned By**. The members of your staff who delegated responsibility for a Workflow Activity to others. If you are a supervisor, you can locate all Workflow Activities that you have delegated by creating a Filter or Query seeking all records where you have been assigned with the Status of Assigned By. A staff person who delegates a Workflow Activity can also be assigned as Responsible.

- **Notify Only**. If you want to keep track of Workflow Activities where you are not technically Responsible or the delegating authority, you can assign yourself as Notify Only. From the Workflow Listings or Calendars, you can easily locate those Activities by selecting the Notify Only filter. A staff member can be assigned to a Workflow Activity with the Status of Notify Only or Responsible, but not both.

- **Speak With/Meet With.** Used for Appointments, Court Events and Phone Calls to designate the Players who will participate in the meeting or telephone call, other than staff members.

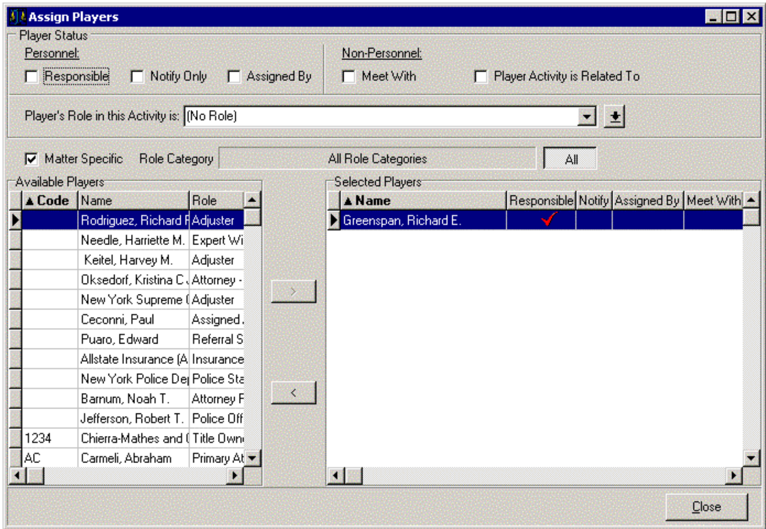
- **Player Activity is Related To.** Allows you to relate a Workflow Activity to any Player involved in a Matter. For instance, in litigation where there are multiple parties, you could relate specific court appearances or depositions to the party affected by those events. To see all Activities relating to that Entity at a glance, you would open that Player's record on the Players tab in the Matter and review the Workflow Activities in the Tree View.

Assigning a Player

To assign a Player to a Workflow Activity:

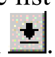
1 Create a New Workflow Activity. The Workflow Activity screen appears.

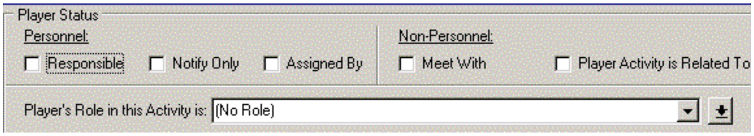
2 Access the Assign Players screen.



- To assign a Player as Responsible, click the  icon next to the Responsible field.
- To assign a Player as Meet With (for an Appointment or Court Event) or Speak With (for a Phone Call), click the  icon next to the Meet With or Speak With field.
- To assign a Player with any other Status, select the Players tab, click the **Assign** button and check the checkbox for the selected Status.

This will take you to the Assign Players screen. A list of the Players that can be assigned with the selected Status will appear in the Available Players list.

3 Select the Player's Role in this Activity from the list of Roles, using the drop-down arrow or the Lookup Listing Control . It is not necessary to assign an Activity Role.



- If you are assigning a Responsible Player, the Default Responsible Role you selected in Workflow Preferences will be selected automatically. See Workflow User Preferences. Otherwise, "No Role" will be selected by default.

- If an appropriate Activity Role does not appear on the list, you can create a new one, following the instructions on "Creating an Activity Role" below.

4 Assign the Players to the Activity.

- Highlight one or more Players in the Available Players list. To highlight more than one Player, hold down the CTRL key and click on each Player you wish to select.

- To expand the list of Available Players to the entire Addressbook, uncheck the "Matter Specific" checkbox.

- After you have selected the Players, click the assign button > .

- To remove an assignment, highlight one or more of the Players in Selected Players list and click the unassign button <.

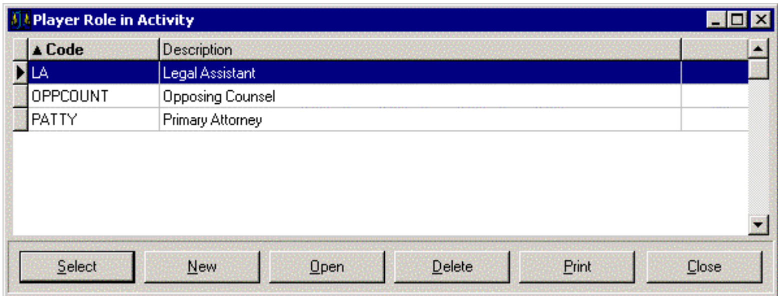
  The assigned Players will appear in the Selected Players list. Red checkboxes will indicate the Statuses assigned to each Player. Use the horizontal scroll bar at the bottom of the list to view all of the Statuses.

5 Click the **Close** button when you have finished. If you are viewing the Players screen, click the first tab to return to the Workflow Activity screen.

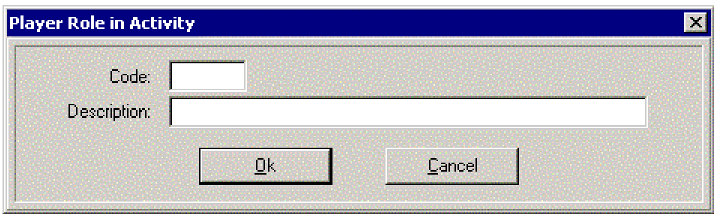
Creating New Workflow Activity Roles

You can add a Player Activity Role to the drop-down list on the Assign Players screen.

1 From the Assign Players screen, click the Lookup List Control  to display the Players Role in Activity screen.



2 Click **New** to create a new Activity Role. The Player Role in Activity screen appears.



3 Enter a Code and Description for the Role and click **Ok** when you are done. The new Activity Role will now appear on the Player Role in Activity Screen.

4 Click **Select** to use the new Activity Role in the Workflow Activity.

5 Click **Close** to return to the Assign Players screen.

The Activity Role will now be included in Player's Role in the Activity list

Making Changes to Workflow Activity Roles

You can edit, delete or print the list of Player Activity Roles from the list of Workflow Activity Roles.

- **Edit an Activity Role.** Click the **Open** button, make changes and click **Ok.**
- **Delete an Activity Role.** Highlight the Activity Role and click the **Delete** button.

  A dialog will appear, requesting you to confirm the deletion. Click **Yes** to confirm the deletion; or **No** to cancel.
- **Print the Activity Role List.** Click the **Print** button and follow the instructions in Printing Listings.

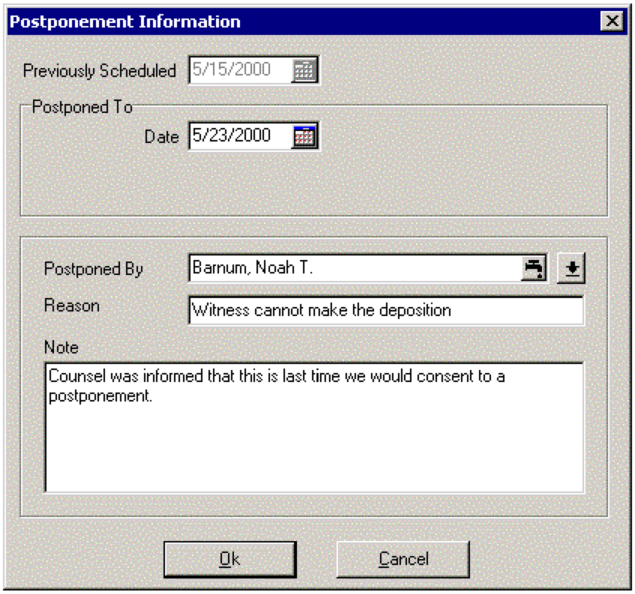
Postponing Workflow Activities

You can postpone a Workflow Activity by opening the Activity record, clicking the **PostponeThis Event** button and entering the details of the postponement on the Postponement Information screen. When a Workflow Activity is postponed, the previous Due or Event Date of the Activity is removed from the Workflow Listings and Calendars. However, a history of the Workflow Activity is maintained on the Postponement tab of the original Workflow Activity. The postponement history shows all of the dates and times an Activity has been scheduled, the Player who requested it and the reason it was postponed. Workflow Activities can also be postponed without a date. Postponement without date can be displayed on the Workflow Calendars or the Workflow Listings,using the “Unscheduled” filter. See Filtering Workflow Activity Records and Workflow Calendars.

Postponing a Workflow Activity:

1. Open an existing Workflow Activity record. See Modifying a Workflow Activity Record.

2. On the Workflow Activity screen, click **Postpone This Event** button. The Postponement Information screen appears.



3. Enter the Due Date or Event Date to which the Activity has been postponed or continued in the **Date** field.

4. If you are rescheduling an Appointment, Court Event or Phone Call meeting, you will be able to enter a new time for the Workflow Activity.

5. Enter the name of a Player in the **Postponed By** field.

   - Type the first few letters of the name of Player in the Filter Lookup Control

   - Click the Lookup Listing Control  to display the Global Addressbook and select a Player from the list.

   You can enter either the name of the Player who requested the postponement or the name of the staff member entered the postponement into Practice Manager.

6 Enter the reason for the postponement in the **Reason** field.

7 If you think it appropriate, enter additional information about the postponement in the **Note** field.

8 Click **Ok** when you are done.

The Workflow Activity will be moved automatically to the new Due Date or Event Date. The record of the postponement will be saved on the Postponement tab.

Maintaining the Postponement List

You can edit or delete a postponement record maintained on the Postponements tab of a Workflow Activity record.

- **Edit a Postponement Record.** Highlight the Postponement record on the list and click the **Open** button. Make any desired changes and click **Ok.**
- **Delete a Postponement Record.** Highlight the Activity Role and click the **Delete** button.

Alarm Functions

For those Workflow Activities that can be scheduled for a particular time—Appointment, Court Event and Phone Call—you can set an Alarm which will sound a tone and display a reminder a specified period of time before the Workflow Activity is scheduled to take place. You can dismiss the Alarm once it appears or set it to reappear after a specified interval.

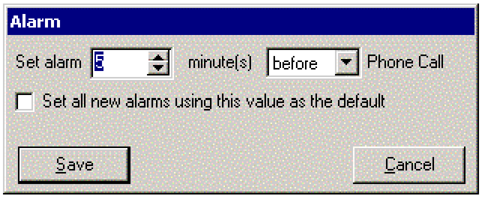
Setting an Alarm

To set an Alarm:

1 Create a new Workflow Activity or open an existing Workflow Activity record for an Appointment, Court Event or Phone Call.

2 Select **On** from the Alarm drop-down list.

The Alarm screen appears.



3 Set the Alarm a specified number of minutes before the Workflow Activity is scheduled to take place.

The default time period is established in User Preferences. See Workflow User Preferences.

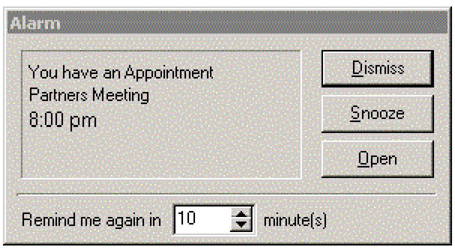
- Use the spin control or type a number to change the time period for the Alarm.
- If you want, you can cause the Alarm to appear after the scheduled time for the Activity by selecting "after" from the drop-down list.
- If you check the checkbox, the Alarm period you entered will automatically update the default in Workflow User Preferences.

4 Click **Save** when you are done.

5 To turn off the Alarm, select **Off** from the Alarm drop-down list.

Alarm Display

If Practice Manager is open, the Alarm reminder screen will appear (and, if you have a sound card, a tone will sound) a specified number of minutes prior to the scheduled time for the Phone Call.



Dismiss the Alarm

If you do not want the Alarm to appear again, click **Dismiss** and the Alarm will be turned off.

Repeat the Alarm

If you want to repeat the Alarm after a certain number of minutes, click **Snooze**. The Alarm reminder screen will appear again after the number of minutes entered on the dialog has elapsed.

Open the Workflow Activity Record

If you click **Open** when the Alarm reminder dialog appears, the Workflow Activity record will open on the screen and the Alarm will be turned off.

Linking Activities and Actions

You can link or assign one or more Workflow Activities and Workflow Actions to another Workflow Activity. Workflow Actions can be linked to a Workflow Activity when you schedule a Workflow Activity using a Workflow Activity Template that includes linked Workflow Actions. Or, you can manually link a Workflow Action to a Workflow Activity at any time. Linked Activities and Actions are displayed on the Linked Actions tab of a Workflow Activity.

- **Linking Workflow Activities.** When you link Workflow Activities—Tasks, Appointments, Court Events, Tasks or Phone Calls--the Due or Event Date of the linked (child) Workflow Activity is determined by the Due Date or Event Date of the Workflow Activity (parent) to which it is linked. The Activity of the child can be set a number of days, months or years before or after the Activity Date of the parent Activity is entered, takes place or has been marked completed.

- **Linking Workflow Actions.** Workflow Actions are templates that execute Practice Manager program functions, such as creating a document. When you link Workflow Actions, the Workflow Actions are attached or assigned to the parent Workflow Activity and can be executed and marked complete from the Linked Actions tab of the parent Workflow Activity.

Linking Workflow Activities

If you have used a Workflow Activity Template that includes linked Workflow Activities, the linked Workflow Activities may already be present on the Linked Actions tab of the parent Activity when it is created. You can link other Workflow Activities on the same screen. For more details on Automatic Scheduling, see Automatic Scheduling. To add a linked Workflow Activity:

1. Either create a new Workflow Activity or open an existing Workflow Activity record for editing. See Creating a New Workflow Activity.
2. Either create a new Workflow Activity or open an existing Workflow Activity record for editing. See Creating a New Workflow Activity.
3. With the parent Workflow Activity open, click on the Linked Actions tab. The Linked Actions screen appears.
4. Click the Right Mouse Button to display a menu of choices.
5. Make sure you have not highlighted any Workflow Activities or Actions already on the screen. If so, move the mouse pointer to a clear area on the screen and click the left mouse button.
6. Choose a Workflow Activity Template from the list of Templates.

   The new Workflow Activity will appear on the screen with its Automatic Scheduling tab displayed. The only option available will be to link the Due Date or Event Date of the Child Activity to the Due Date or Event Date of the Parent Activity.
7. From the Automatic Scheduling screen of the linked Workflow Activity, select one of the three choices available for linking the date of the Child Activity to the Parent Activity:
   - From the date the Parent Activity is due (if the Parent Activity is a Task or a Phone Call), is scheduled to be held (if the Parent Activity is an Appointment or Court Event) or is scheduled to occur (if the Parent Activity is a Critical Date)
   - From the date the Parent Activity is completed, is actually held or is complied with.
   - From the date the Parent Activity is entered.
8. Click Save when you are done.

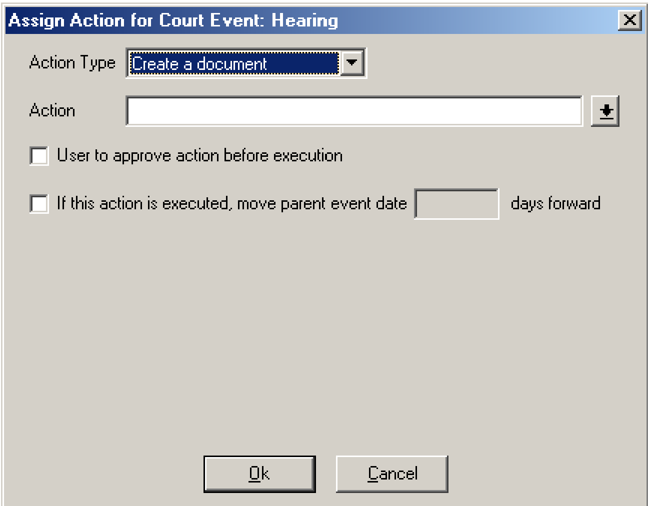
Linking Workflow Actions

When you link a Workflow Action, it will appear on the Linked Actions screen, where it can be activated at any time. To link a Workflow Action to a parent Activity:

1. Either create a new Workflow Activity or open an existing Workflow Activity record for editing. See Creating a New Workflow Activity.

2. With the parent Workflow Activity open, click on the Linked Actions tab. The Linked Actions screen appears.

3. Click **New** or select **Insert Action** from the menu displayed when you click the Right Mouse Button to display a menu of choices. The **Assign Action** screen appears.



4. Select the type of Workflow Action you want to link to the Workflow Activity. Your choices include:

   - **Create a document.** This will link a Document Profile Template. When this template is executed, a Document Profile will be created automatically.

   - **Create a time slip record.** This will link a Timeslip Template, which will automatically generate a time slip, when the Workflow Action is executed.

- **Create an email item.** This will link a GroupWare Template. When this action is executed, a GroupWare item—such as an e-mail—will be created.

- **Create a Player Record.** This will link a Player Template. When this Action si executed, a Player record will be created.

- **Create a Matter.** This will link a Matter Template. When this Action is executed, a Matter record will be created.

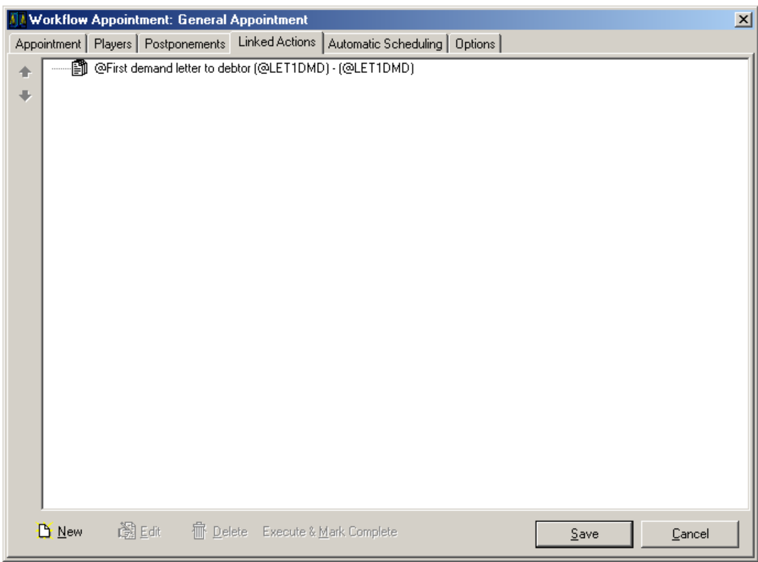
- **Create a Note.** This will link a Note Template. When the Note Template is executed a new Note will be created.

- **Execute a program function.** There are two types of program functions that can be linked. The first type of program function will automatically change the Matter Status filed when it is executed; the second will automatically launch a Workflow Plan.

5 Display the list of Workflow Actions of the chosen type by clicking the Lookup List Control and select an Action Template.

6 Click **Ok** when you are done; or **Cancel** to cancel the link.

The Action will be displayed on the Linked Action screen.



Using Automatic Scheduling

Practice Manager allows you to automatically schedule the Activity Date--Due Date or Event Date--of a Workflow Activity—a Task, Appointment, Court Event, Phone Call or Critical Date. When Automatic Scheduling is in effect, the Activity Date of the Workflow Activity is based upon another date supplied by the Practice Manager database. There are two types of dates used for Automatic Scheduling:

- Activity Date of Another Workflow Activity
- Another Date Field in the Matter

Automatic Scheduling options can be entered automatically by the Workflow Template used to schedule a Workflow Activity or they can be entered or updated manually on the Automatic Scheduling tab of a Workflow Activity.

Based Upon Date of Another Workflow Activity

The Activity Date of the Workflow Activity you are scheduling (the "Child" Workflow Activity) can be based upon the Due Date or Event Date of another Workflow Activity which has already been entered or scheduled in the Matter (the "Parent" Workflow Activity). The Activity Date of the Child Activity can be calculated automatically based upon the Activity Date of the Parent in one of three ways:

- **Date Parent Activity Entered.** It can be set to the date the Parent Activity was entered or scheduled or a date a specified number of days, months or years before or after that date. Practice Manager will automatically calculate this date and enter it in the Activity Date field of the Child Activity.
- **Date Parent Activity Will Actually Take Place** It can be set to the same Due Date or Event Date as the Parent Activity or a specified number of days, months or years before or after that date. Practice Manager will automatically calculate this date and enter it in the Activity Date field of the Child Activity.
- **Date Parent Activity is Marked Completed.** It can be set to the date the Parent Activity was marked complete or a specified number of days, months or years before or after that date. Since Workflow Activities do not always take place on the date they are scheduled to occur, Practice

Manager allows you to expressly "mark" a Workflow Activity complete and enter the date of completion. For an Appointment, Court Event or Phone Call, the completion date is called the "Date Held"; for a Task, it is called the "Date Completed"; and for a Critical Date, it is called the "Date Complied With". If the date has actually occurred, the calculated date will be entered in the Activity Date field; if not, that date will be left blank until the Parent Activity has been marked complete.

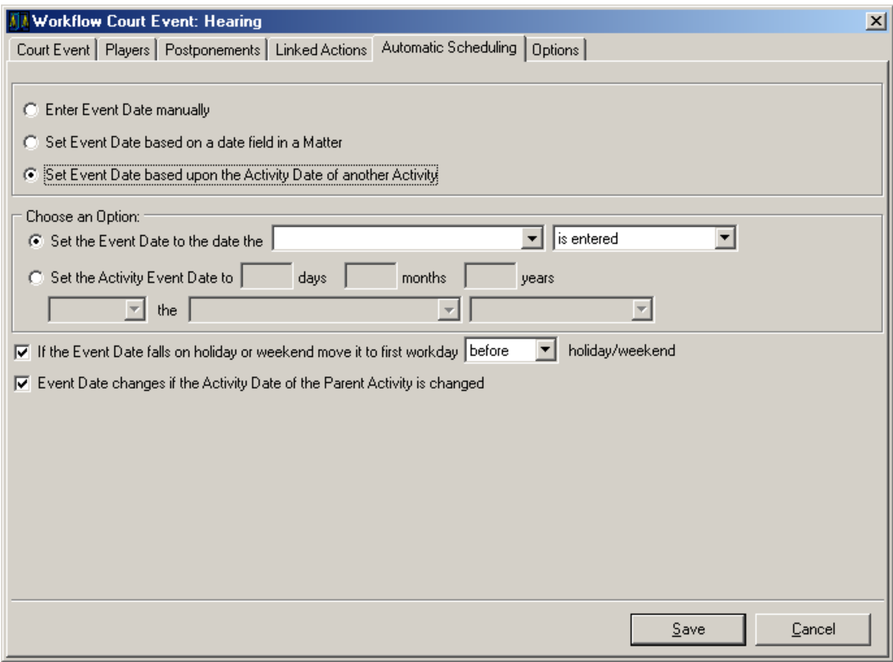
If Automatic Scheduling options for this type of automatic scheduling were not entered by the Workflow Template, you can enter them manually on the Automatic Scheduling screen.

Note: *If the Workflow Activity itself is a "parent" of another Workflow Activity, this automatic scheduling option will not be available on the Automatic Scheduling screen.*

1 If the Workflow Activity is not already open, open it for editing. See Modifying a Workflow Activity Record.

2 Click the Automatic Scheduling tab and select the last radio button. The description for the radio button will vary depending upon type of Workflow Activity.

In the Choose an Option box, two options will be displayed.



3 To schedule the Activity Date of the Child Activity for the **same date** as a date of the Parent Activity, choose the first option; to schedule the Activity Date a certain period of time before or after a date of the Parent Activity, choose the second option.

4 Choose the Parent Activity from the drop-down box.

5 Choose the date of the Parent Activity on which you want to base the Activity Date of the Child Activity:

- **Date Entered.** Choose "is entered" to base the Activity Date of the Child Activity on the date the Parent Activity was scheduled in the Practice Manager database.
- **Date Due**. Choose "is due" (for a Task or Phone Call), "is scheduled to occur" (for a Critical Date) or "is scheduled to be held" (for a Court Event or Appointment) to base the Activity Date on the Due Date or Event Date of the Parent Activity.
- **Date Completed**. Choose "is completed" (for a Task or Phone Call), "is actually held" (for a Court Event or Appointment) or "is complied with" (for a Critical Date) to base the Activity Date on the date the Parent Activity was actually completed..

6 If you chose to set the Activity Date a certain period of time before or after the date of the Parent Activity,

- Select either "before" or "after" from the drop-down list; and
- Determine the time period by entering the number of days, months or years or a combination.

  For example, you could schedule the Child Activity to take place 1 year, 3 months and 10 days before the date the Parent Activity was scheduled to take place.

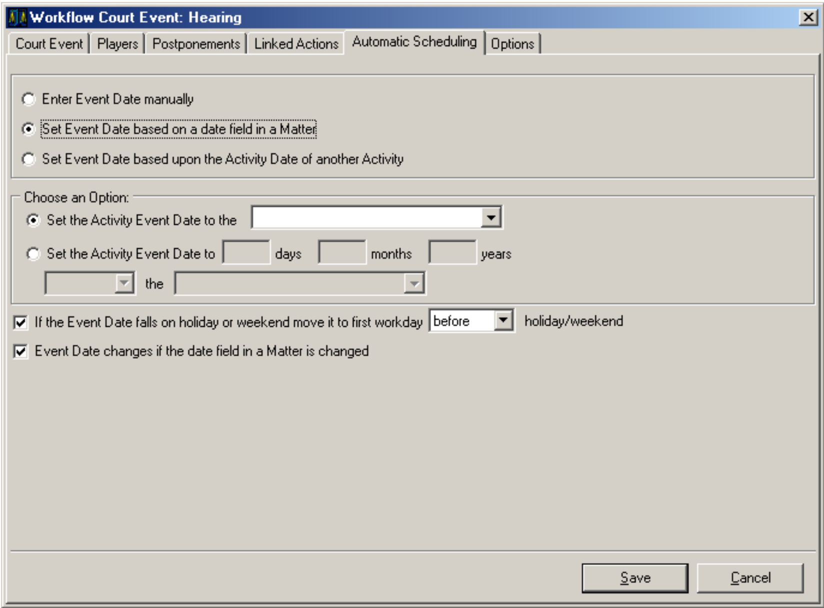
Based Upon a Date Field in the Matter

The Activity Date of a Workflow Activity can be set in relation to a date field in the Matter. Any date field in the Practice Manager database can be used. Your System Administrator will determine which date fields will be available for this type of Advanced Scheduling. To schedule an Activity Date based upon a date field:

1 If the Workflow Activity is not already open, open it for editing. See Modifying a Workflow Activity Record.

2 Click the Automatic Scheduling tab and select the radio button for this option. The description for the radio button will vary depending upon type of Workflow Activity.

In the Choose an Option box, two options will be displayed.



3 To schedule the Activity Date of the Workflow Activity for the **same date** as a date field in the Matter, choose the first option; to schedule the Activity Date a certain period of time before or after a date in the Matter, choose the second option.

4 Choose the Date Field in the Matter from the drop-down box.

For example, you might choose the date the Matter was opened. The exact dates appearing in the drop-down list will depend upon the dates your System Administrator has established.

5 If you chose the second option, which will set the Activity Date a certain period of time before or after the date in the Matter,

- Select either "before" or "after" from the drop-down list; and

- Determine the time period by entering the number of days, months or years or a combination.

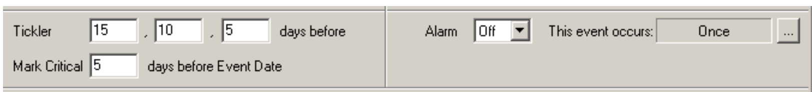
Using Ticklers

A Tickler is an advance notification of the details of a Workflow Activity. Ticklers appear as entries on the Tickler branch of the Workflow Calendars, starting a certain number of days before the Due Date or Event Date of a Workflow Activity. You can create up to three Ticklers for each Workflow Activity. The first two Ticklers appear for a single day on your calendar; the third Tickler appears continuously until the Activity Date. You can also set a Mark Critical tickler. On the date a Tickler is marked critical, a time-bomb icon will appear next to the Tickler Activity and will remain on your calendar until the Due Date or Event Date of the Workflow Activity. Ticklers cease to appear on the Workflow Calendars on the actual Due Date or Event Date. On that date, the actual Workflow Activity itself will show up on the Workflow Calendars. However, after the Due Date or Event, Workflow Activities appear on the "Overdue" branch of your Workflow Calendars, until they are marked completed.

Creating Ticklers

You create Ticklers on the main screen of the Workflow Activity record.

1 Create a new Workflow Activity record or open an existing record.



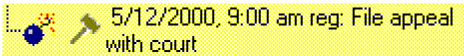
2 To create a Tickler, enter a positive number in one or more of the three Tickler boxes.

For the first two boxes (starting from the left), the Tickler will appear on your calendar for a single day, the number of days prior to the Due Date or Event Date of the Workflow Activity that you enter into a box. To calculate the Tickler date, subtract the Tickler number from the Activity Date. For instance, if you entered a 7 in the first Tickler box, a Task due on May 19 would appear on the Tickler list on May 12.

If you enter a number in the third box, the Tickler will appear continuously on your calendar until the Due Date or Event Date is marked completed.

3 To designate a Mark Critical Date, check the Mark Critical checkbox and enter a number in the Mark Critical box.

The Mark Critical Date is calculated in the same way as Ticklers. The Mark Critical Date is presented along with a time-bomb icon and will remain until the Due Date or Event Date of the Workflow Activity is marked completed.

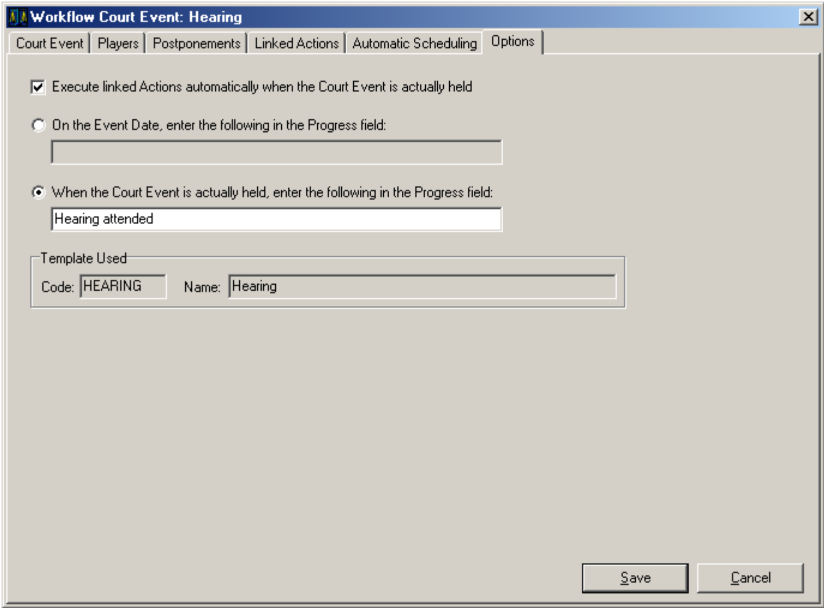


Setting Workflow Options

The Options screen is used to set two options in Workflow Activity records that govern the completion of Workflow Activities. If these Options have not been determined by the Workflow Activity Template used to create the Workflow Activity, you can set them yourself.

- **Automatically Execute Linked Actions.** Whether Workflow Actions linked to a Workflow Activity will be executed automatically when a Workflow Activity is marked completed, held or complied with.
- **Updating the Progress Field.** Whether and when a description of the completed Workflow Activity should be entered automatically in the Progress field, located on the Workflow Activity screen.

To access the Options screen, Create a new Workflow Activity or modify an existing Workflow Activity record and click on the Options tab.



Automatically Execute Actions Upon Completion of a Workflow Activity

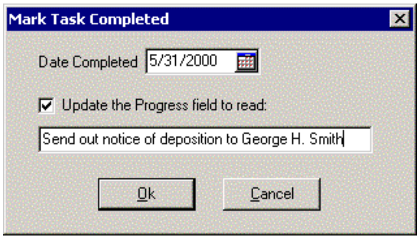
If Workflow Actions are linked to a Workflow Activity, you can specify that the Linked Actions will be executed when the Workflow Activity to which the Actions are linked is marked completed, held or complied with. To enable this option, click on the checkbox labeled "Execute linked Actions automatically, when the. . ."   If this option is enabled, any Workflow Actions linked to the Workflow Activity will be automatically executed when the Workflow Activity is marked "completed". For instance, if the Workflow Action is a Document Profile, the Document Profile will be automatically activated. For more information on Workflow Actions, see Linking Activities and Actions.

Note: Even if Automatic Execution is enabled, you can still be given the option to cancel execution of the linked Actions, by choosing the option "User to approve action before execution" in the Workflow Action itself. See Linking Activities and Actions for more information on setting this option.

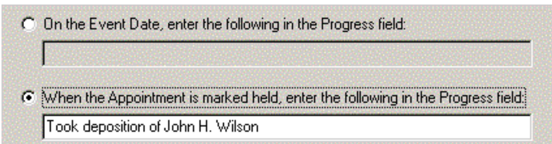
Note: When a Workflow Action is linked to a Workflow Activity that is not included in a Plan, the User will always be given the option to execute Linked Actions when the Workflow Activity is marked complete.

Updating the Progress Field

When you mark a Workflow Activity "completed" (for a Task or Phone Call; "held" for an Appointment or Court Event; "complied with" for a Critical Date), a dialog appears in which you can enter the actual date the Workflow Activity was held, completed or complied as well as a description of the completed Workflow Activity.



This description is entered into the Progress field of the Workflow Activity record. In the Options screen, you can create the description that will be entered into the Progress field. You can also specify that the progress field will be updated on the Activity Date—the Due Date or Event Date—rather than the date that was entered when the Activity was marked completed, held or complied with.



To use this option:

1. Choose when you want the progress field to be updated.

   - If you choose the first radio button—"On the Due/Event Date. . ."—the Progress field will be updated on the Activity's Due Date or Event Date.
     The text entered in the text field, as described below, will be entered automatically in the dialog that appears when a Workflow Activity is marked completed, held or complied with.

   - If you choose the second radio button, the Progress field will be updated on the date the Activity is marked held, completed or complied with.

2. Enter the text of the description you want to enter in the Progress field. Normally, this description will be in the past tense, for example, "Filed notice of appeal" or "Attended hearing on motion to dismiss".

Scheduling Specific Types of Activities

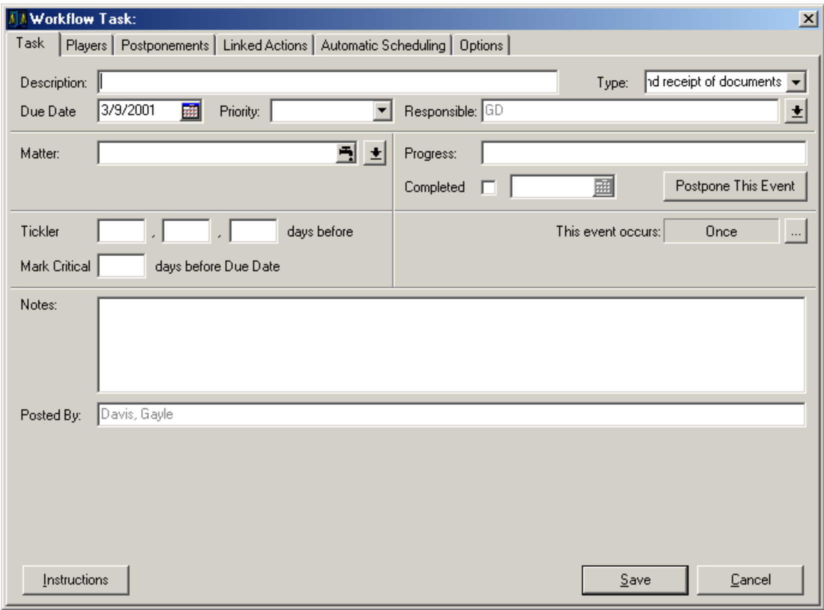
Scheduling a Task

A Task is the concrete work which must be performed to accomplish your objectives in a Matter—preparing a document, sending out a letter, filing a pleading, or doing a title search. To schedule a Task:

1 **Starting a Task Record.** Start a new Task from the Workflow Listing or the Workflow Calendar in a Matter or in one of the other ways described in Creating a New Workflow Activity.

2 **Using a Workflow Template.** Unless the use of Workflow Templates has been disabled, select a Workflow Template from the Template list. See Using Workflow Activity Templates.

Select the Template that most accurately and narrowly describes the Task in question. The Task screen will be displayed. Any fields that were included in the Workflow Template will already be filled in.



3 **Filling Out Standard Fields.** Fill out the fields on the Task screen that have not already been field out by the Template. For detailed

information on filling out these fields, see Completing the Workflow Activity Screen.

In the Description field, set forth a description of the task you wish to complete.

4 **Due Date.** Enter the Due Date manually or click on the Automatic Scheduling tab and schedule the Due Date automatically, as described in Automatic Scheduling. You can schedule the Due Date automatically based upon:

- **Date in Matter.** The Due Date will be set automatically to a date either before, after or on the same day as another date in the Practice Manager database. For instance, you could schedule Tasks a certain number of days or months after the date a Matter was opened.

- **Activity Date of Another Workflow Activity.** The Due Date can be set automatically to a date either before, after or on the same date as the Due Date or Event Date of another Workflow Activity in the Matter was entered in the database, is scheduled to occur or has been marked completed.

5 **Ticklers.** If you want to receive advance notification of the Due Date of the Task, create one or more Ticklers. See Using Ticklers.

6 **Assign Players.**

- **Responsible.** Assign the personnel members who are responsible for completion of the Task. For a Task to appear on your Workflow Calendar, you must be assigned as a Responsible Player. The initials of Responsible personnel members will be displayed in the Responsible field. If you need to assign Responsible personnel, click the  to access the Assign Players screen and follow the instructions in Assigning Players to a Workflow Activity.

- **Assign By and Notify Only,** You can also keep a record of personnel members who delegated the Task by assigning them as “Assign By” Players. In addition, any personnel members who need to receive notice of the Workflow Activity, regardless of whether they actually delegated the Task or have responsibility to complete it, can be assigned as “Notify Only” Players. See Assigning Players to a Workflow Activity for more information.

- **Player Activity is Related To.** On the Assign Players screen, you can also select those Players to whom the Activity is related. When you review that Player's Addressbook record in the Matter, all of the Workflow Activities he has been assigned to will be displayed.

7 **Linked Activities.** If you want to schedule other Workflow Activities at the same time that are dependent upon the Due Date of the Task, create and link them on the Linked Actions tab. For more information on Linking Workflow Activities, see Linking Activities and Actions.

Note: If you have scheduled the Due Date automatically, by making it dependent upon the Activity Date of another Activity, you will not be able link Workflow Activities as children to the Task.

8 **Linked Actions.** From the Linked Actions tab, you can also insert Workflow Actions, which can be executed at the time the Task is marked complete. See Linking Activities and Actions and Executing Workflow Actions. If you want these Actions to be executed automatically, when the Task is marked complete, click on the Options tab and check the checkbox "Execute linked Actions automatically when the Task is marked complete." For more information, see Marking Workflow Activities Completed.

9 Click **Save** to save the Task and close the Workflow Activity; or click **Cancel** to close the screen without saving the Task.

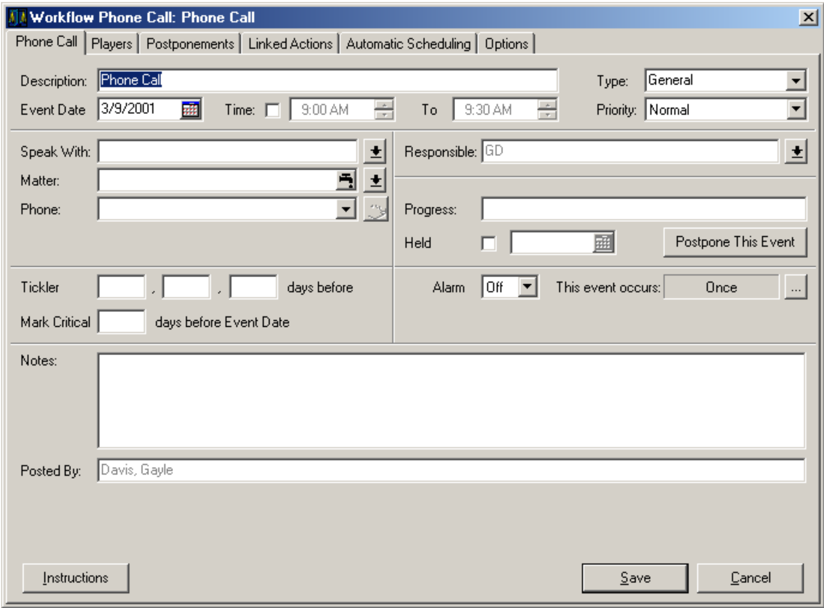
Scheduling a Phone Call

A Phone Call is a reminder to place a phone call or to participate in a conference call. When you schedule a Phone Call for a specific time, it resembles an Appointment; otherwise, it functions much like a Task. A Phone Call appears on the Workflow Calendars on its Event Date. Like an Appointment, you can assign the Players to the Phone Call that you intended to "Speak With" and they will be displayed on the Players tab and appear in a list in the "Speak With" field on the Phone Call Activity screen. From the list of Speak With Players, one can be selected to display in the "Speak With" field. When a Speak With Player has been selected, a Phone Call icon  appears. When it is selected, the Phone Call screen is displayed. The Phone Call screen gives you access to all of the telephone numbers of the selected Player and enables you to record all of the details of the Phone Call. To schedule a Phone Call

1 Starting **a Phone Call.** Start a new Phone Call from the Workflow Listing or the Workflow Calendar in a Matter or in one of the other ways described in Creating a New Workflow Activity.

2 **Using a Workflow Template.** Unless the use of Workflow Templates has been disabled, select a Workflow Template from the Template list. See Using Workflow Activity Templates.

Select the Template that most accurately and narrowly describes the Phone Call you expect to make. The Phone Call screen appears. Any fields that were included in the Workflow Template will already be filled in.



3 **Filling Out Standard Fields.** Fill out the fields on the Phone Call screen that have not already been field out by the Template. For detailed information on filling out these fields, see Completing the Workflow Activity Screen.

In the Description field, set forth a description of the Phone Call you wish to make.

4 **Event Date.** Enter the Event Date manually or click on the Automatic Scheduling tab and schedule the Event Date automatically, as described in Automatic Scheduling. You can schedule the Event Date automatically based upon:

- **Date in Matter.** The Event Date will be set automatically to a date either before, after or on the same day as another date in the Practice Manager database.

- **Activity Date of Another Workflow Activity.** The Event Date can be set automatically to a date either before, after or on the same date as the Due Date or Event Date of another Workflow Activity in the Matter was entered in the database, is scheduled to occur or has been marked completed. For instance, you could schedule a Phone Call to a court reporter a certain number of days prior to the date a deposition is scheduled to take place.

5 **Time Fields.** If you want to schedule a Phone Call for a specific time, enable the Time fields by checking the **Time From** field, and entering the time of the Phone Call.

6 **Using the Alarm.** Turn the Alarm to **On**, and a reminder screen will be displayed (and, if you have a sound card, a tone will sound) a specified number of minutes prior to the scheduled time for the Phone Call. For more information on setting an Alarm, see Setting Alarms.

7 **Using Ticklers.** If you want to receive advance notification of the Event Date of the Phone Call, create one or more Ticklers. See Using Ticklers.

8 **Assign Players.** Assign Players to the Phone Call.

- **Personnel.** Assign the personnel members who are responsible for completion of the Phone Call. For a Phone Call to appear on your Workflow Calendar, you must be assigned as a Responsible Player. The initials of Responsible personnel members will appear in the Responsible field. If you need to assign Responsible personnel, click the to access the Assign Players screen and follow the instructions in Assigning Players to a Workflow Activity.

- **Assign By and Notify Only.** You can also keep a record of personnel members who delegated the Phone Call by assigning them as "Assign By" Players. In addition, any personnel members who need to receive notice of Workflow Activity, regardless of whether they actually delegated the Phone Call or have responsibility to complete it, can be assigned as "Notify Only" Players. See Assigning Players to a Workflow Activity for more information.

- **Player Activity is Related To.** On the Assign Players screen, you can also select those Players to whom the Activity is related. When you review that Player's Addressbook record in the Matter, all of the Workflow Activities he has been assigned to will be displayed.

- **Speak With Players.** Designate one or more Players as Speak With Parties by clicking on the icon next to the Speak With field and choosing Players on the Assign Players screen. After the Speak With Players have been selected, they will appear in a list in the Speak With field. You can choose one of the Speak With Players to display in the Speak With field. When you do so, the Phone Call icon will become active.

Note. *When you click the Phone Call icon, the Place a Call screen will appear. From that screen, you will have access to all of the telephone numbers for the selected Player and a place to make a note of your call. For the other features available from the Place a Call screen, see*

9 **Linked Activities.** If you want to schedule other Workflow Activities at the same time that are dependent upon the Event Date or Event Date of the Phone Call, create and link them on the Linked Actions tab. For more information on Linking Workflow Activities, see Linking Activities and Actions.

Note: *If you have scheduled the Event Date automatically, by making it dependent upon the Activity Date of another Activity, you will not be able link Workflow Activities as children to the Phone Call.*

10 **Linked Actions.** From the Linked Actions tab, you can also insert Workflow Actions, which can be executed at the time the Phone Call is marked complete. See Linking Activities and Actions and Executing Workflow Actions. If you want these Actions to be executed automatically, when the Phone Call is marked complete, click on the Options tab and check the checkbox "Execute linked Actions automatically when the Phone Call is marked complete." For more information, see Marking Workflow Activities Completed.

11 Click **Save** to save the Phone Call and close the Workflow Activity; or click **Cancel** to close the screen without saving the Phone Call.

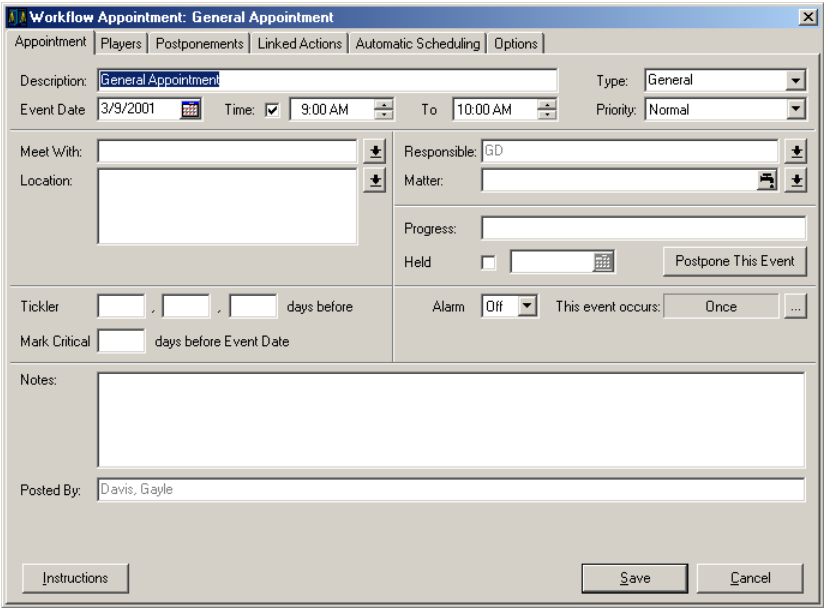
Scheduling an Appointment

An Appointment is a meeting you attend with other people, at a specific time and place, but does not include those meetings that take place in court or before other tribunals. For Court Appointments, you should schedule a Court Event. See Scheduling a Court Event. To schedule an Appointment:

1 **Starting an Appointment.** Start a new Appointment from the Workflow Listing or the Workflow Calendar in a Matter or in one of the other ways described in Creating a New Workflow Activity.

2 **Using a Workflow Template.** Unless the use of Workflow Templates has been disabled, select a Workflow Template from the Template list. See Using Workflow Activity Templates.

Select the Template that most accurately and narrowly describes the Appointment you expect to make. The Appointment screen will appear. Any fields that were included in the Workflow Template will already be filled in.



3 **Fill Out Standard Fields.** Fill out the fields on the Appointment screen that have not already been field out by the Template. For detailed information on filling out these fields, see Completing the Workflow Activity Screen.

In the Description field, set forth a description of the Appointment.

4 **Event Date.** Enter the Event Date manually or click on the Automatic Scheduling tab and schedule the Event Date automatically, as described in Using Automatic Scheduling. You can schedule the Event Date automatically based upon:

- **Date in Matter.** The Event Date will be set automatically to a date either before, after or on the same day as another date in the Practice Manager database.

- **Activity Date of Another Workflow Activity.** The Event Date can be set automatically to a date either before, after or on the same date as the Due Date or Event Date of another Workflow Activity in the Matter was entered in the database, is scheduled to occur or has been marked completed. For instance, you could schedule a Phone Call to a court reporter a certain number of days prior to the date a deposition is scheduled to take place.

5 **Time Fields.** Enter the starting and ending time for the Appointment.

6 **Using the Alarm.** If you want a reminder to be displayed a specified number of minutes before the Appointment, turn the Alarm to **On**. For more information on setting an Alarm, see Setting Alarms.

7 **Using Ticklers.** If you want to receive advance notification of the Appointment, create one or more Ticklers. See Using Ticklers.

8 **Assign Players.** Assign Players to the Workflow Activity.

- **Personnel.** Assign the personnel members who are responsible for the Appointment. Normally, these will be the members of your staff who will attend the Appointment. For an Appointment to appear on your Workflow Calendar, you must be assigned as a Responsible Player. The initials of Responsible personnel members will be displayed in the Responsible field. If you need to assign Responsible personnel, click the Lookup List Control  to access the Assign Players screen and follow the instructions in Assigning Players to a Workflow Activity.

- **Assign By and Notify Only Players.** If appropriate, you can also keep a record of personnel members who delegated or assigned the Appointment to someone else by assigning them as "Assign By" Players. In addition, any personnel member who needs to receive notice of the Appointment, regardless of whether they actually delegated the Appointment or plan to attend, can be assigned as "Notify Only" Players. See Assigning Players to a Workflow Activity for more information.

- **Meet With Players.** If you want to maintain a record of parties, other than staff, who will attend a meeting, you can designate them as "Meet With" Players by clicking on the Lookup List icon next to the Meet With field and choosing Players on the Assign Players screen.

- **Player Activity is Related To.** On the Assign Players screen, you can also select those Players to whom the Activity is related. For instance, in multi-party litigation, if a particular hearing relates to a specific party and not others, you could assign that party as a "Player Activity is Related To." When you review that Player's Addressbook record in the Matter, all of the Workflow Activities he has been assigned to will be displayed.

9 **Linked Activities.** If you want to schedule other Workflow Activities at the same time that are dependent upon the Appointment, create and link them on the Linked Actions tab. For more information on Linking Workflow Activities, see Linking Activities and Actions.

Note: *If you have scheduled the Event Date automatically, by making it dependent upon the Activity Date of another Activity, you will not be able link Workflow Activities as children to the Appointment.*

10 **Linked Actions.** From the Linked Actions tab, you can also insert Workflow Actions, which can be executed at the time the Appointment Call is marked held. See Linking Activities and Actions and Executing Workflow Actions. If you want these Actions to be executed automatically, when the Appointment is marked held, click on the Options tab and check the checkbox "Execute linked Actions automatically when the Appointment is marked held." For more information, see Marking Workflow Activities Completed.

11 Click **Save** to save the Appointment and close the Workflow Activity; or click **Cancel** to close the screen without saving the Appointment.

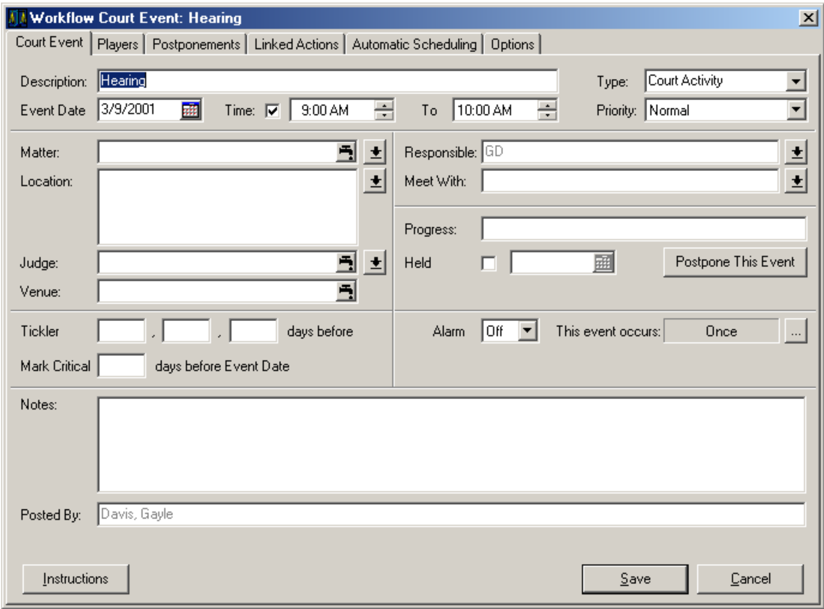
Scheduling a Court Event

A Court Event is an Appointment that takes place in court or before other tribunals. In addition to the fields included in an Appointment, a Court Event includes fields for the Judge or other presiding official and the Jurisdiction of the tribunal. To schedule a Court Event:

1 **Starting a Court Event.** Start a new Court Event from the Workflow Listing or the Workflow Calendar in a Matter or in one of the other ways described in Creating a New Workflow Activity.

2 **Using a Workflow Template.** Unless the use of Workflow Templates has been disabled, select a Workflow Template from the Template list. See Using Workflow Activity Templates.

Select the Template that most accurately and narrowly describes the Court Event in question. The Court Event screen will appear. Any fields that were included in the Workflow Template will already be filled in.



3 **Fill Out Standard Fields.** Fill out the fields on the Court Event screen that have not already been filled out by the Template. For detailed information on filling out these fields, see Completing the Workflow Activity Screen.

In the Description field, set forth a description of the Court Event.

4 **Event Date.** Enter the Event Date manually or click on the Automatic Scheduling tab and schedule the Event Date automatically, as described in Automatic Scheduling. You can schedule the Event Date automatically based upon:

- **Date in Matter.** The Event Date will be set automatically to a date either before, after or on the same day as another date in the Practice Manager database.

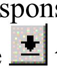
- **Activity Date of Another Workflow Activity.** The Event Date can be set automatically to a date either before, after or on the same date as the Due Date or Event Date of another Workflow Activity in the Matter was entered in the database, is scheduled to occur or has been marked completed.

5 **Time Fields.** Enter the starting and ending time for the Court Event.

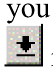
6 **Using the Alarm.** If you want a reminder to be displayed a specified number of minutes before the Court Event, turn the Alarm to **On**. For more information on setting an Alarm, see Setting Alarms.

7 **Using Ticklers.** If you want to receive advance notification of the Court Event, create one or more Ticklers. See Using Ticklers.

8 **Assign Players.** Assign Players to the Court Event.

- **Responsible.** Assign the personnel members who are responsible for the Court Event. Normally, these will be the members of your staff who will attend the Court Event. For a Court Event to appear on your Workflow Calendar, you must be assigned as a Responsible Player. The initials of Responsible personnel members will be displayed in the Responsible field. If you need to assign Responsible personnel, click the  to access the Assign Players screen and follow the instructions in Assigning Players to a Workflow Activity.

- **Assign By and Notify Only.** If appropriate, you can also keep a record of personnel members who delegated or assigned the Court Event to someone else by assigning them as “Assign By” Players. In addition, any personnel members who need to receive notice of the Court Event, regardless of whether they actually delegated the Court Event or plan to attend, can be assigned as “Notify Only” Players. See Assigning Players to a Workflow Activity for more information.

- **Meet With Players.** If you want to maintain a record of parties, other than staff, who will attend a Court Event, such as the names of opposing counsel, you can designate them as “Meet With” Players by clicking on the  icon next to the Meet With field and choosing Players on the Assign Players screen.

- **Player Activity is Related To.** On the Assign Players screen, you can also select those Player to whom the Activity is related. For instance, in multi-party litigation, if a particular hearing relates to a specific party and not others, you could assign that party as a “Player Activity is Related To.” When you review that Player’s

Addressbook record in the Matter, all of the Workflow Activities he has been assigned to will be displayed.

9 **Linked Activities.** If you want to schedule other Workflow Activities at the same time that are dependent upon the Court Event, create and link them on the Linked Actions tab. For more information on Linking Workflow Activities, see Linking Activities and Actions.

Note: If you have scheduled the Event Date automatically, by making it dependent upon the Activity Date of another Activity, you will not be able link Workflow Activities as children to the Court Event.

10 **Linked Actions.** From the Linked Actions tab, you can also insert Workflow Actions, which can be executed at the time the Court Event is marked held. See Linking Activities and Actions and Executing Workflow Actions. If you want these Actions to be executed automatically, when the Court Event is marked held, click on the Options tab and check the checkbox "Execute linked Actions automatically when the Court Event is marked held." For more information, see Marking Workflow Activities Completed.

11 Click **Save** to save the Court Event and close the Workflow Activity; or click **Cancel** to close the screen without saving the Court Event.

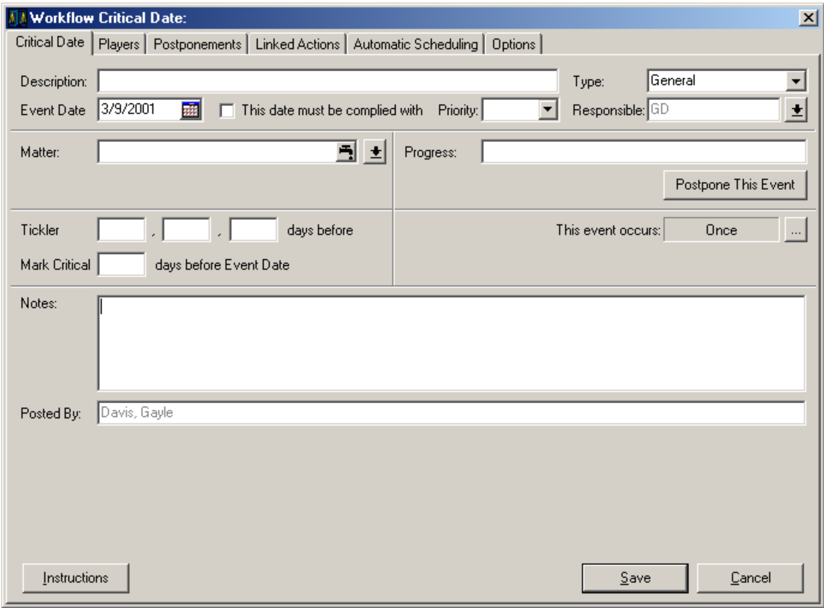
Scheduling a Critical Date

A Critical Date is a Workflow record used to keep track of important deadlines and events that have independent, critical significance in a Matter. Examples are court-imposed deadlines and statutes of limitations. Unlike a Task, a Critical Date does not in itself represent something that must be accomplished, although it is often true that tasks must be performed before the occurrence of a Critical Date. Unlike an Appointment, a Critical Date does not take place at a specific time and does not include a field to record Players who will attend. To schedule a Critical Date:

1 **Starting a Critical Date Record.** Start a new Critical Date from the Workflow Listing or the Workflow Calendar in a Matter or in one of the other ways described in Creating a New Workflow Activity.

2 **Using a Workflow Template.** Unless the use of Workflow Templates has been disabled, select a Workflow Template from the Template list. See Using Workflow Activity Templates.

Select the Template that most accurately and narrowly describes the Critical Date in question. The Critical Date screen will appear. Any fields that were included in the Workflow Template will already be filled in.



3 **Filling Out Standard Fields.** Fill out the fields on the Critical Date screen that have not already been field out by the Template. For detailed information on filling out these fields, see Completing the Workflow Activity Screen.

In the Description field, set forth a description of the Critical Date you wish to complete.

4 **Event Date.** Enter the Event Date manually or click on the Automatic Scheduling tab and schedule the Event Date automatically, as described in Using Automatic Scheduling. You can schedule the Event Date automatically based upon:

- **Date in Matter.** The Event Date will be set automatically to a date either before, after or on the same day as another date in the Practice Manager database. For instance, you could schedule the "Expiration of the Statute of Limitations" a certain number of years after the Date of Incident in a personal injury case.

- **Activity Date of Another Workflow Activity.** The Event Date can be set automatically to a date either before, after or on the same date as the Due Date or Event Date of another Workflow Activity in the Matter was entered in the database, is scheduled to occur or has been marked completed.

5 **Ticklers.** If you want to receive advance notification of the Event Date of the Critical Date, create one or more Ticklers. See Using Ticklers.

6 **Assigning Players.** Assign Players to the Critical Date.

- **Responsible.** Assign the personnel members who are responsible for compliance with the Critical Date. For a Critical Date to appear on your Workflow Calendar, you must be assigned as a Responsible Player. The initials of Responsible personnel members will appear in the Responsible field. If you need to assign Responsible personnel, click the to access the Assign Players screen and follow the instructions in Assigning Players to a Workflow Activity.

- **Assign By and Notify Only.** You can also keep a record of personnel members who delegated responsibility for compliance with the Critical Date by assigning them as “Assign By” Players. In addition, any personnel members who need to receive notice of the Critical Date, regardless of their responsibility for complying with it, can do so by being assigned as “Notify Only” Players. See Assigning Players to a Workflow Activity for more information.

- **Player Activity is Related To.** On the Assign Players screen, you can also select those Players to whom the Activity is related. For instance, in multi-party litigation, if a particular hearing relates to a specific party and not others, you could assign that party as a “Player Activity is Related To.” When you review that Player’s Addressbook record in the Matter, all of the Workflow Activities he has been assigned to will be displayed.

7 **Linked Activities.** If you want to schedule other Workflow Activities at the same time that are dependent upon the Event Date of the Critical Date, create and link them on the Linked Actions tab. For more information on Linking Workflow Activities, see Linking Activities and Actions.

Note: *If you have scheduled the Event Date automatically, by making it dependent upon the Activity Date of another Activity, you will not be able link Workflow Activities as children to the Critical Date.*

8 **Linked Actions.** From the Linked Actions tab, you can also insert Workflow Actions, which can be executed at the time the Critical Date is marked complied with. See Linking Activities and Actions and Executing Workflow Actions. If you want these Actions to be executed automatically, when the Critical Date is marked complied with, click on the Options tab and check the checkbox "Execute linked Actions automatically when the Critical Date is marked complied with." For more information, see Marking Workflow Activities Completed.

9 Click **Save** to save the Critical Date and close the Workflow Activity screen; or click **Cancel** to close the screen without saving the Critical Date.

Completing Workflow Activities

Executing Workflow Actions

Workflow Actions are templates that execute Practice Manager program functions, such as creating a document. When you link Workflow Actions, the Workflow Actions are attached or assigned to the parent Workflow Activity. Normally, you will execute Linked Workflow Actions at the time when you complete the Workflow Activities to which they are assigned. See Marking Workflow Activities Completed. Linked Workflow Actions can be executed from the Workflow Listings, the Workflow Calendars or from the Linked Actions tab of the parent Workflow Activity. If you mark a Workflow Activity complete without first executing the linked Workflow Actions, you will receive a warning message, prompting you to execute the linked Actions.

If a Workflow Activity is part of a Workflow Plan, you will have to execute linked Workflow Actions from the Plan. See Executing Workflow Actions in a Plan.

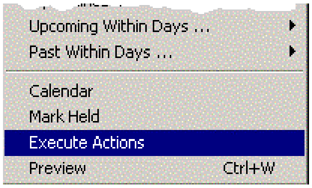
From the Workflow Listings

You can execute Linked Actions from the Global Workflow or Matter Workflow Listings. A link icon  will appear in the **Linked Actions** column, if Linked Actions have been assigned to the Workflow Activity. You will also see the Linked Actions on the Linked Actions tab of the Workflow Activity. To execute the Linked Actions:

1 Display the Workflow Listing where the Workflow Activity appears. See Displaying Workflow Listings and Calendars.

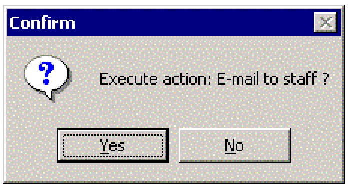
2 Locate the Workflow Activity that you want to mark complete. See Searching the Workflow Listings.

3 Display the View Menu by using the Right Mouse button or selecting **View** from the Practice Manager Menu.



4 Select **Execute Actions**.

- If "User to approve action before action" was selected when the Action was initially assigned to the Workflow Activity, a confirmation dialog box will appear.

  – Click **Yes** to execute the Action.

  – Click **No** to defer execution of the Action. If you select **No,** the Action will continue to be linked to the Activity and can be executed at a later time.

- If "User to approve action before action" was selected when the Action was initially assigned to the Workflow Activity, the Action will be executed.

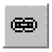
5 Complete the Action that has been executed.

- If you have initiated an Action Template, you will be presented with a record, such as an e-mail, document, note or time slip. If so, complete and save the record.

- If you have initiated a program function, such as changing the status, the status will changed automatically.

- If you have initiated a new Plan, the Plan will appear on the screen.

From the Workflow Calendars

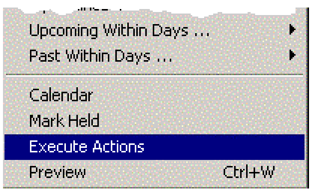
You can execute Linked Actions from the Global Workflow Calendar or Matter Workflow Calendars. A link icon  will appear next to any Workflow Activity that has linked Actions assigned to it. You can execute a Linked Action from the Workflow Calendars or you can open a Workflow Activity and execute the Linked Actions from the Linked Actions tab of the Workflow Activity. To execute the Linked Actions:

1 Display the Workflow Calendar where the Workflow Activity appears.

2 Locate the Workflow Activity that you want to mark complete on the Calendar and highlight it.

   The Workflow Activity will appear on the Calendar on its Due Date or Event Date. If Ticklers have been activated, you will find the Workflow Activity on the Tickler.

3 Display the View Menu by using the Right Mouse button or selecting **View** from the Practice Manager Menu.



4 Select **Execute Actions** and follow the instructions in the previous section.

Marking Workflow Activities Completed

After you create a Workflow Activity, it can be tracked on the Workflow Listings. It will also appear on your Workflow Calendars on the Activity Date—on the Due Date for Tasks or on the Event Date for all other types of Workflow Activities. To give you a complete record of the history of Workflow Activities, Practice Manager allows you to mark Workflow Activities complete. When you mark a Workflow Activity complete, the date of completion can be entered into the Practice Manager database. To signify completion, a red check mark ✓ appears next to the Workflow Activity on the Workflow Calendars; it can also be displayed in the Workflow Listings. For instructions on marking a Workflow Activity complete on a Workflow Plan, see Executing Workflow Actions in a Plan.

Significance of Marking Workflow Activities Completed

Marking a Workflow Activity complete and entering a completion date has different significance, depending upon the type of Workflow Activity.

Tasks. A Task is marked "Completed". You will enter "Date Completed"—the date the Task was actually completed. This may often be different from the Due Date for the Task.

Appointment and Court Events. An Appointment or Court Event is marked "Held". You will enter the "Date Held"—the date the event actually took place.

Phone Calls. A Phone Call is marked "Held". You will enter the "Date Held"—the date the Phone call took place.

Critical Dates. If the option in a Critical Date "This date must be complied with" is checked, then you will be able to mark the Critical Date "Complied With". You will enter the "Date of Compliance"—normally the date the action was taken which resulted in compliance with the Critical Date. For instance, if the Critical Date was an appeal deadline, the "Date of Compliance" might be the date the notice of appeal was filed.

Mechanics of Marking Workflow Activities Completed

You can mark a Workflow Activity complete from the Workflow Listings and the Workflow Calendars. For a discussion of marking a Workflow Activity complete from a Workflow Plan, see Completing Workflow Activities in a Plan.

From the Workflow Listings

1 Display the Workflow Listing where the Workflow Activity appears. See Displaying Workflow Listings and Calendars.

2 Locate the Workflow Activity that you want to mark complete. See Searching the Workflow Listings.

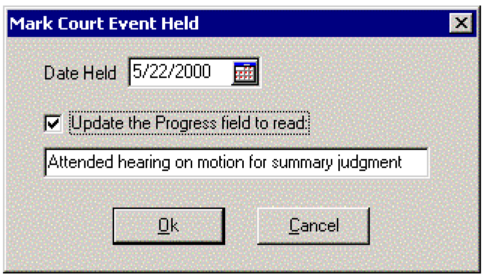
3 Open the Workflow Activity or highlight it in the Workflow Listing:

- If you open the Workflow Activity, check the checkbox used for marking Workflow Activities completed.

  The exact language used to signify marking the Workflow Activity completed will depend upon the type of Workflow Activity.

- If you highlight the Workflow Activity, display the View Menu by clicking the Right Mouse button or selecting View from the Practice Manager Menu and select the menu item for marking Workflow Activities completed.

A dialog used for entering completion information will be displayed. It will include today's date.



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4 Enter the date that the Workflow Activity was actually held, completed or complied with.

You can accept the date displayed or enter a different date.

5 If you want to enter information in the Progress field, click on the "Update the Progress field to read" checkbox.

Practice Manager will automatically transfer information that was entered on the Options screen into the Progress field. This information can be further modified, as necessary. The Progress field is intended to provide a description of the completed Workflow Activity. For instance, when the Task “File motion to dismiss” is completed, the Progress field could be updated to read “Filed motion to dismiss.” This entry could be used in a report providing a list of the important events that have occurred in a Matter. See Setting Workflow Options.

When you are done, click **Ok** to update the Workflow Activity or **Cancel** if you change your mind.

From the Workflow Calendars

1 Display the Workflow Calendar where the Workflow Activity appears. See Displaying Workflow Listings and Calendars.

A Workflow Activity appears on the Workflow Calendars on the Due Date (if it is a Task) or the Event Date (if it is a Court Event, Appointment, Phone Call or Critical Date). You can also access a Workflow Activity from the Tickler list on the Workflow Calendars. If it is overdue, it will appear on the Overdue branch of your calendar.

2 Open the Workflow Activity or highlight it on the Workflow Calendar.

3 Follow the instructions above for marking Workflow Activities completed from the Workflow Listings.

When the Workflow Activity is marked completed, held or complied with, a red check mark ✓ will appear next to it on the Workflow Calendars on the date that was entered as the “Date Held”, “Compliance Date” or “Date Completed”, as the case may be. The Workflow Activity will also be removed from the Tickler or Overdue branches of the Calendar.

Using the Workflow Listings and Calendars

Workflow Listings

There are two types of Workflow Listings: the Global Workflow Listing and the Matter Workflow Listing. The GlobalWorkflow Listing is a list of all Workflow Activities for all of your Matters. The Matter Workflow Listing displays only those Workflow Activities that have been created in the Matter that is open. From either of the Workflow Listings you can schedule new Workflow Activities, modify or reschedule existing Workflow Activities, delete entries and sort and filter the Listings for use in creating reports and schedules for your Matters. You can also execute Workflow Actions from Workflow Actions and mark Workflow Activities complete.

Workflow Calendars

For each type of Workflow Listing, there is a comparable Workflow Calendar, accessed by clicking the Calendar tab at the bottom of the Workflow Listing. When you access the Calendar from a Workflow Listing, whatever is displayed on a Workflow Listing will appear on the Workflow Calendar. However, Workflow Calendars also provide you access to Ticklers—which gives you advance notice of upcoming Workflow Activities—and Overdue Workflow Activities—those Activities whose Activity Dates have passed without being marked completed, held or complied with. From the Workflow Calendars, you can create, modify, and delete Workflow Activities. You can also print the Workflow Calendars, a day, week or month at a time.; and the Filters and Queries available on the Workflow Listings are also accessible from the Workflow Calendars.

Functions Available from Workflow Listings and Calendars

From the Workflow Listings and Calendars, you can:

- Schedule a New Workflow Activity.
- Modify a Workflow Activity.
- Postpone a Workflow Activity.
- Change the Workflow Listing Layout from Workflow Listings. Change the order, size and number of fields displayed on the Workflow Listings.

- Sort Workflow Listings. Sort Workflow Activities by date or type in ascending or descending order.

- Search the Workflow Listing. Using the QuickSearch Window, you can search for any Workflow record you wish to view or change by date, Description, Matter or any other field displayed on the Workflow Listing.

- Filter Workflow Activity Records. You can create and save your own Filters and advanced Queries to display particular Workflow Activities on Workflow Listings or Calendars, using almost any field included on the screens used to schedule Workflow Activities, including date ranges, Activity Type, Jurisdiction and Priority.

- Print Workflow Reports. By modifying the Listing layout, filtering and sorting records, you can display and order Workflow Activities on the Workflow Listings to create schedules and reports for a single Matter or for groups of Matters. These listings can be displayed on your computer, saved in a file or printed. You can also print the records displayed on your Workflow Calendars by day, week or month.

Displaying Workflow Listings and Calendars

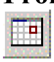
Workflow Activities can be displayed both on the Workflow Listings and the Workflow Calendars. The Global Workflow Listing and Calendar are used to display Workflow Activities for all Matters; the Workflow Activities displayed on the Matter Workflow Listing and Calendar are limited to the current Matter.

Workflow Listings

Practice Manager gives you access to two Workflow Listings—a GlobalWorkflow Listing for all Matters and a Matter Workflow Listing for each Matter.

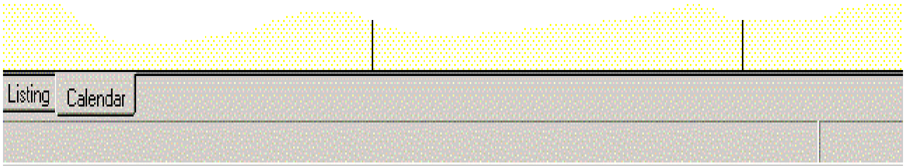
Displaying the Global Workflow Listing

To access and display the GlobalWorkflow Listing:

- **From the Practice Manager Toolbar.** Click the Workflow Listing icon  on the Practice Manager Toolbar.

- From the Practice Manager Menu. Select **File** and then **Open** and then select **Workflow** from the Practice Manager Menu.
- **Using a Shortcut Key.** Strike the F12 function key.

The Global Workflow Listing will be displayed, unless you have chosen "Auto Open Calendar in Workflow listing" in User Preferences. If the Workflow Calendar is displayed, click on the Listing tab located at the bottom left corner of the screen.



Displaying the Matter Workflow Listing

Whenever you open a Matter, Practice Manager includes a Workflow Listing of all Workflow Activities scheduled in that Matter. To display the Matter Workflow Listing:

1. Select and open an existing Matter.
2. Click on the Workflow tab at the top of the screen.

   The Matter Workflow Listing will be displayed, unless you have chosen "Auto Open Calendar in Workflow listing" in User Preferences. If the Workflow Calendar is displayed, click on the Listing tab located at the bottom left corner of the screen.

Workflow Calendars

Like Workflow Listings, there are two Workflow Calendars. The GlobalWorkflow Calendar displays Workflow Activities for all Matters. The Matter Workflow Calendar allows you to schedule and display Workflow Activities for a particular Matter. The Workflow Calendars are designed to be an alternative display of the Workflow Listings. When you display a Workflow Calendar, you will see exactly the same Workflow Activities that appear in the corresponding Workflow Listing. However, unlike Workflow Listings, Workflow Calendars include a Tickler list, which gives you advance notification of upcoming Workflow Activities and a an Overdue list, which keeps overdue

Workflow Activities on your calendar until they are marked completed, held or complied with. The Workflow Calendars can be displayed in three different views—a single day; a week at a time; and a month at a time.

Displaying the Matter Workflow Calendar

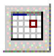
1. Select and open an existing Matter.
2. Click on the Workflow tab at the top of the screen.

   The Matter Workflow Listing will be displayed, unless you have chosen "Auto Open Calendar in Workflow listing" in User Preferences.
3. Unless the Calendar opens, click on the Calendar tab located at the bottom left corner of the screen.

   The Workflow Calendar will appear, ing the current day, week or month, depending upon what Default View you have chosen in Preferences. See Setting Other Preferences.

Displaying the Global Workflow Listing

1. Open the Global Workflow Listing.

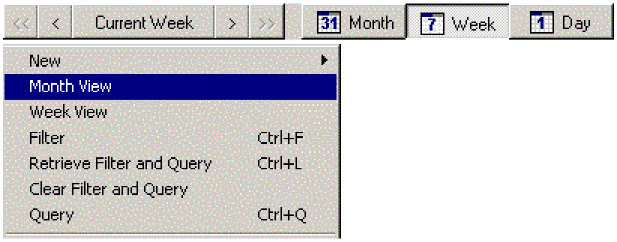
   - **From the** Practice Manager **Toolbar.** Click the Workflow Listing icon  on the Practice Manager Toolbar.
   - **From the Practice Manager Menu.** Select **File** and then **Open** and then select **Workflow** from the Practice Manager Menu.
   - **Using a Shortcut Key.** Strike the F12 function key.

   The Global Workflow Listing will be displayed, unless you have chosen "Auto Open Calendar in Workflow listing" in User Preferences.
2. Unless the Calendar is already open, click on the Calendar tab located at the bottom left corner of the screen.

   The Workflow Calendar will appear, displaying the current day, week or month, depending upon what Default View you have chosen in Preferences. See Setting Other Preferences.

Using the Calendar Views

Changing Calendar Views. You can display Workflow Calendars in three different views—daily, weekly or monthly. Use the buttons located above the Workflow Calendar or the View Menu to change the view.



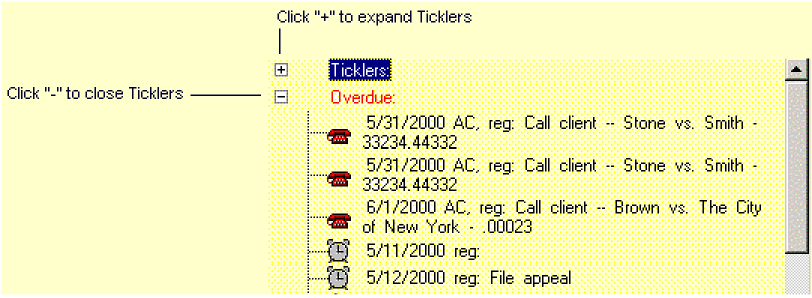
Changing Dates. Depending upon the view, you can change the month, week or day being viewed, by using the control buttons located on the top left corner of the Workflow Calendar:

- Click on  to display the same day in the next month in the Day View; the next week in the Week View, or the next month in the Month View; or  to display the same day in the previous month in the Day View, the next week in the Week View or the next month in the Month View.

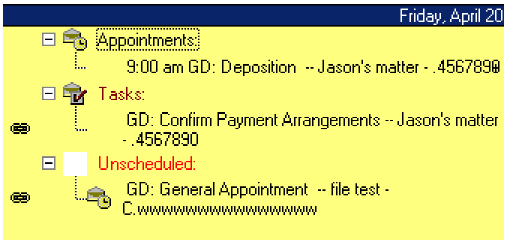
- Click on  to display the same day, week or month in the next year or  to display the same day, week or month of the previous year.

- Click on “Today” in the Day View, “Current Week” in the Week View or “Current Month” in the Month View to return to the current day.

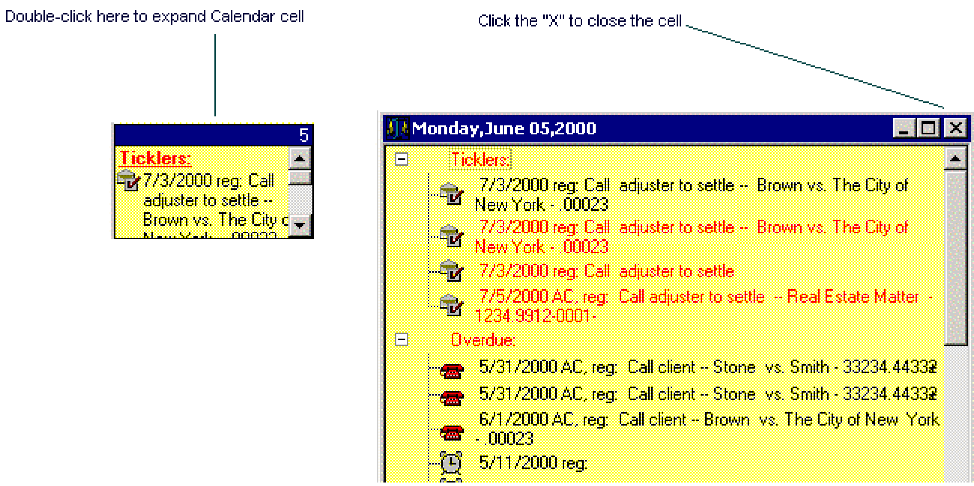
Ticklers and OverdueActivities. On all three Calendar views, you can view Ticklers and Overdue Workflow Activities. Ticklers and Overdue Activities are organized by date in descending order (oldest Activity first). If you elect in Workflow Preferences to sort Ticklers by Priority, Ticklers and Overdue Activities will be grouped by priority; within each group, Workflow Activities will be sorted in descending order. To expand or close the list of Ticklers or Overdue Activities, double-click on “Tickler” or “Overdue” or click the  or  signs.



Unscheduled Activities. If a Workflow Activity is scheduled without a date, it will appear on a separate branch of the Calendar when the "Unscheduled" Filter" is turned on. See Filtering Workflow Activity Records.

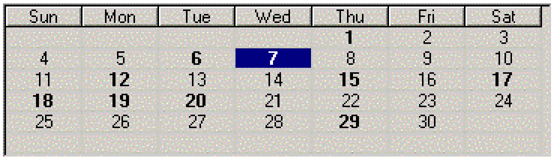


Expanding Month View Cells. When you are viewing the Calendar in the Month View, you can expand the size of an individual cell by double-clicking on the title bar of the cell. Click the Close icon on the expanded cell to close it.



Day View Features

The Day View gives you access to all Workflow Activities that are scheduled for the current workday. You can view your Appointments and Court Events for the day on an appointment calendar. On the right panel of the Day View, you will see all Tasks, Phone Calls and Critical Dates, as well as your Tickler and list of Overdue items. You also have access to a monthly calendar to help you schedule new Workflow Activities. A date displayed in boldface informs you of Workflow Activities that are due or scheduled for that date. Clicking on the date will display those Activities on the Calendar. Clicking on **Today** will bring you back to your current schedule.



Searching the Workflow Listings

Although the need to search for a record in a Workflow Listing may be more limited than for other Listings, you can use the QuickSeach Window to locate a Workflow Activity. To search for a Workflow Activity, you must set the field to be used for the search as the Sort Field. The most useful search fields are probably “Description” and “Event/Due Date”. For more detailed information on searching for records in Listings, see Searching for Records in Listings.

Using the QuickSearch Window

To search for records using the QuickSearch Window:

1. Limit the number of Activities displayed, if you want, using QuickFilters, a User-defined Filter or a Query. For instance, you could limit the Workflow Activities to those of a particular Category or a particular date range.
2. Choose the Sort Field for the search, such as Description.
3. Type the first few characters of the first word or words applicable to the Sort Field you are trying to match. For instance, if you are searching for

"Hearing on Motion for Summary Judgment ", you could enter "Hearing" in the Subject field.

As you type, the QuickSearch Window will open, displaying the characters you have entered. All Workflow Activities whose Description begins with the characters you have entered will be displayed in the Workflow Listing.

4 If you can only remember a portion of the words you are using for the search, place the wildcard character "*" before the search string. This allows you to search for Workflow Activities **containing** particular characters. Thus, in the foregoing example, typing "*Summary" would display every Workflow Activity that contains that word at any location in the Description field.

5 To clear the Search window for a new search,

- Click in the QuickSearch Window
- Click on another Workflow Activity in the Workflow Listing
- Delete the characters in the QuickSearch Window.

Sorting Workflow Listings

Workflow Activities can be sorted by any field displayed in a Workflow Listing, in ascending or descending order, alphabetically or numerically, depending upon the field. You will probably choose to sort Workflow Activities by the **Due/Event Date** field in descending order. You select the Sort Field and change the sort order of the Workflow Listing, just like other Listings. See Sorting Listings.

Select the Sort Field and set the Sort Order

To select the Sort Field and set the sort order:

1 If the Sort Field does not appear as a column heading on the Column Heading Bar, add the desired column to the Workflow Listing layout. See Changing the Workflow Listing Layout.

2 Double-click on the column of the field in the Column Heading Bar to choose the field and sort it in ascending order, indicated by the ▼ symbol.

To change to descending order, double-click again. The sort indicator will change to the ▲ symbol.

An alternate way to change the sort order*:* Point to the column to be used for sorting, display the Column Control Menu and choose “Ascending” or “Descending” from the menu.

3 The new sort order will remain in effect until you close the Workflow Listing.

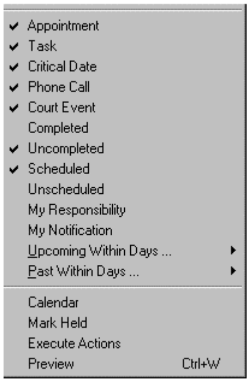
4 To **Save** the selected sort options, choose **Save Grid Layout** on the Column Control Menu.

Filtering Workflow Activity Records

You can limit the number of Workflow entries displayed in a Workflow Listing using QuickFilters, User-defined Filters or Queries. The View Menu—accessed from the Practice Manager Menu—contains the same Filters as are present in the QuickFilter Bar, along with several others. In User Preferences, you can set options that activate a specific Filter or Query for the Workflow Listings or present the list of Filters and Queries each time you open a Workflow Listing. See Setting Filter Options for Listings. From the Workflow Calendars, you can also access the View Menu and create and retrieve User-defined Filters and Queries.

QuickFilters

You can access QuickFilters from the Filter Bar in Workflow Listings and from the View Menu in both Workflow Listings and Calendars. Select one or more of the QuickFilters from the Filter Bar or the View Menu to display or limit the records displayed. The Filters in the View Menu are equivalent to checkboxes and are cumulative rather than restrictive. In other words, Workflow Activity records need only satisfy a single Filter, rather than all Filters, selected on the View Menu, to be displayed. For detailed information on QuickFilters and the use of QuickFilter controls, see Using QuickFilters and Listing Components and Controls.



Selecting:

- **Appointment:** Displays all Workflow Activities that are Appointments.
- **Task:** Displays all Workflow Activities that are Tasks.
- **Critical Date:** Displays all Workflow Activities that are Critical Dates.
- **Phone Call:** Displays all Workflow Activities that are reminders to make Phone Calls.
- **Court Event:** Displays all Workflow Activities that are Court Events.
- **Completed:** Displays Workflow Activities that have been marked completed, held or complied with.
- **Uncompleted:** Displays Workflow Activities that have not been marked completed, held or complied with.
- **My Responsibility (View Menu Only):** Displays Workflow Activities for which the current User has been designated as “Responsible”.
- **My Notification (View Menu Only):** Displays Workflow Activities for which the current User has been designated as “Notify Only”.
- **Scheduled:** Displays Workflow Activities that have been scheduled—assigned either a Due Date or an Event Date.
- **Unscheduled:** Displays Workflow Activities that have not been scheduled—have not been assigned a Due Date or Event Date-or which have been postponed without a date

- **Upcoming Within Days:** Displays Workflow Activities whose Due Date or Event Date will occur within the stated period of days—30, 60, 90, 180, 365 or such Other number of days as you enter.
- **Past Within Days:** Displays Workflow Activities whose Due Date or Event Date occurred within the stated period of days prior to today's date—30, 60, 90, 180, 365 or such Other number of days as you enter.

User-defined Filters

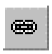
You can create, save and retrieve Filters and Queries, based upon one or a combination of several fields included in a Workflow Activity that are not available using a QuickFilter, such as Activity Type, Priority, Location or Jurisdiction (Description or Code). You can create User-defined Filters or Queries that will display all Workflow Activities that you have delegated to other personnel members ("Assign By"). User-defined Filters and Queries are accessed from the View Menu or the Practice Manager Toolbar. For detailed information on using User-Defined Filters and Queries, see Creating Filters to Select Records and Using Queries to Filter Listings.

Changing the Workflow Listing Layout

The columns of a Workflow Listing display information from fields in the Workflow Activities that have been scheduled.

What Columns Should Be Displayed

For daily use, you should choose fields for columns that are the most useful in organizing the workflow in your office. You can temporarily change the column layout when generating special-purpose lists for reports. The following fields are useful for daily monitoring of your workflow:

- **Linked Actions.** Whether Workflow Activities included Linked Workflow Actions, which can be executed from the Workflow Listing. A link icon  will appear if Linked Actions are present.
- **Due/Event Date.** The date an Appointment, Court Event or Phone Call will take place, a Critical Date will occur or a Task or is due.

- **Time From**. The time an Appointment, Court Event or Phone call will take place.
- **Responsible.** The initials of the personnel members who have been assigned as Responsible Players.
- **Category**. The Category of the Workflow Activity—Appointment, Court Event, Critical Date, Phone Call and Task.
- **Description.** The subject or description of the Workflow Activity.
- **Priority.** The relative urgency of the Workflow Activity.
- **Progress.** The current status of the Workflow Activity.
- **Location.** The location of an Appointment.
- **Jurisdiction.** The jurisdiction where a court appointment will take place. Useful for creating a list of all court events for the court calendar.

Adding, Removing, Ordering and Resizing Columns

You can add, remove, order and resize columns on a Workflow Listing, just like other Listings. To make these changes to the columns listed on the Column Heading Bar, you will access the Column Control Menu or drag the columns to the proper location and size. For detailed information on how to change the Layout of Listings, see Listing Components and Controls and Customizing the Listing Layout.. In summary:

To add or remove a column:

Display the Column Control Menu and either select the column name to add it or deselect the column to remove it. If the fields you want to add are not listed on the Column Control Menu, choose "More Columns. . ." and select additional columns from the "Available Fields" listing.

To change the size of a column, drag the column to the desired size.

To change the order of the columns, either

- Drag displayed columns into the desired positions
- Choose "More Columns. . ." from the Column Control Menu, select the columns you want to appear in the listing and move the fields up or down

in the Selected Fields list to create the desired field order. The new layout will remain in effect until you close the Listing.

- To **Save** the modified layout, choose “Save Grid Layout” on the Column Control Menu.

Workflow Plans--Overview

For each Matter, you can create one or more Workflow Plans. A Workflow Plan allows you to use all of the elements of Practice Manager Workflow—Workflow Activities, Workflow Actions and Workflow Questions and Answers—and view the relationships between them in a graphical Windows Explorer-type format. In a Workflow Plan, you can schedule Workflow Activities—Tasks, Appointments, Court Events, Phone Calls and Critical Dates--and provide alternative workflow options using Workflow Questions and Answers. Using Automatic Scheduling, you can automatically schedule Workflow Activities, based upon the occurrence or completion of other Workflow Activities. You can also assign Workflow Actions to Workflow Activities that will automatically execute features of Practice Manager or your GroupWare program to “complete” the Workflow Activities set forth in the Plan.

To use a Workflow Plan, follow this general approach:

- **Retrieve a Plan.** Your Practice Manager Administrator will create one or more pre-defined Workflow Plans, which you will be able to select from a list and retrieve into the Workflow Plan Window. When you retrieve the Plan, you will be able to select the elements to include in the Plan and you will be able to supplement the Plan with additional Workflow elements at any time. See Retrieving a Workflow Plan.

- **The Elements of a Workflow Plan.** The Workflow Plan will include three types of elements:

- **Workflow Activities**—Tasks, Phone Calls, Critical Dates, Appointments and Court Events that define the major events and work responsibilities involved in a Matter.

- **Workflow Actions**— Workflow Actions that are assigned or linked to specific Workflow Activities and launch specific functions of Practice Manager or your GroupWare program designed to help you accomplish the work required for those Workflow Activities.

- **Workflow Questions and Answers**— Workflow Questions that indicate alternative options or issues arising during completion of the Workflow Plan with each Answer to a Question representing a different option or resolution that can be selected. Workflow Activities, Workflow Actions and other Workflow Questions can be linked to each Answer inserted in the Plan and brought into play when a particular Answer is selected.

- **Scheduling Workflow Activities.** The Workflow Activities included in a Workflow Plan are not "scheduled" until the Workflow Plan is retrieved into a Matter and individual Workflow Activities are assigned an Activity Date—either a Due Date or Event Date. The Activity Date of a Workflow Activity will either be scheduled automatically using the Automatic Scheduling options contained in the Workflow Template used to create it or you will be prompted to enter it manually when the Plan is retrieved into the Matter. Just as the Activity Date of a Workflow Activity scheduled outside of a Workflow Plan, the Activity Date of a Workflow Activity Activities included in a Workflow Plan can be scheduled automatically:

- **By Date Entered.** On the same date as, or a specified period of time after, the Workflow Activity appears on the Plan.

- **By Date of Another Workflow Activity.** A specified period of time before or after the Activity Date of another Workflow Activity already present in the Plan.

- **By Date in the Matter.** A specified period of time before or after the date entered in a date field in the Matter.

  A Workflow Activity can be scheduled manually simply be editing it and inserting the Activity Date. See Scheduling Workflow Activities.

- **Implementing the Workflow Plan.** A Workflow Plan is implemented by scheduling and completing Workflow Activities, executing and completing Workflow Actions associated with Workflow Activities and Answering Workflow Questions. See Implementing Workflow Plans.

Retrieving a Workflow Plan

To use a Workflow Plan in a Matter, you must retrieve one of the pre-defined Workflow Plans created for your office into the Workflow Plan Window. A Workflow Plan consists of one or more Workflow Activities, Workflow Actions and Workflow Questions and their associated Answers. Once you have retrieved the Workflow Plan into the Workflow Plan Window, you can modify the Plan by inserting additional Workflow Activities, Workflow Actions, and Workflow Questions and Answers.

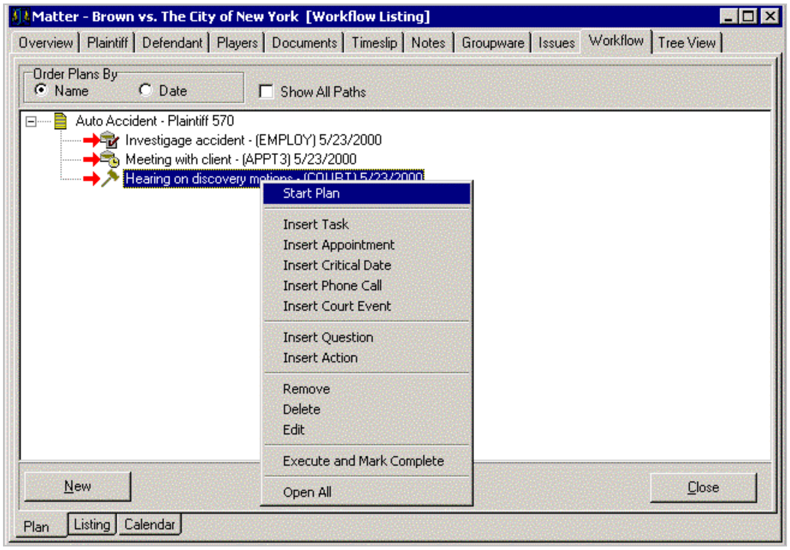
- To add Workflow Activities to the Plan, see Adding Workflow Activities to a Plan.
- To add Workflow Actions to the Plan, see Adding Workflow Actions to a Plan.
- To add Questions and Answers to the Plan, see Adding Questions and Answers to a Plan.

Displaying the Workflow Plan Window

To retrieve a Workflow Plan, you must first display the Workflow Plan Window.

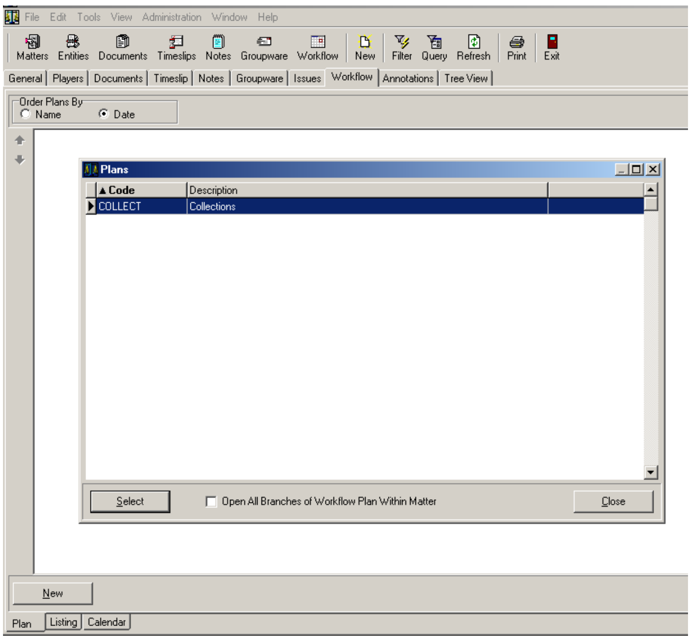
1. Open an existing Matter.
2. Click on the **Workflow** tab.

   If you selected a Preference to display the Workflow Plan as the default “View” in the Workflow section of a Matter, the Workflow Plan Window will already be open, displaying any Workflow Plans that have already been retrieved.
3. If the Workflow Plan Window is not in view, click on the **Plan** tab at the bottom to open it.



Retrieving the Plan

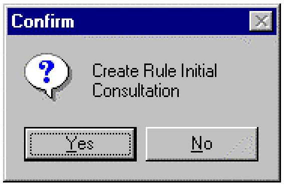
1 Display the Workflow Plan Menu using the Right Mouse Button and click **Start Plan.** The Workflow Plan List appears.

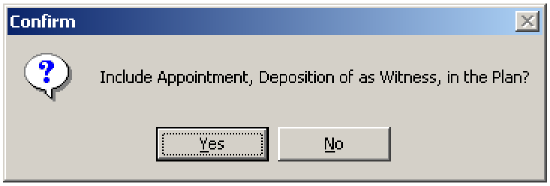


2 Highlight a Plan on the list and click on the **Select** button.

The selected Workflow Plan will be retrieved into the Workflow Plan Window.

3 As the Workflow Plan is being retrieved, a dialog may appear one or more times, asking you whether you want to include specific Workflow Activities in the Plan.

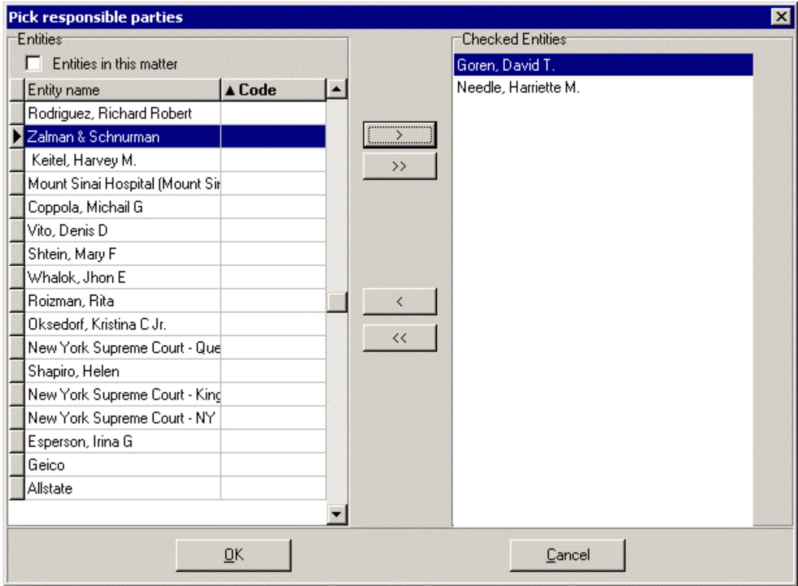




- If you click **Yes**, the Workflow Activity described in the dialog and any Workflow Activities, Workflow Actions and Questions and Answers linked to it, will be included in the Plan.
- If you click **No**, the Workflow Activity, and associated items, will not be included in the Plan.
- Repeat for each Dialog that appears.

4 If another dialog appears, giving you the option to enter the date of Activity included in the Workflow Plan, enter the date.

5 If the Workflow Plan gives you the option to assign specific personnel members as Responsible and Notify Only Players, a list of personnel members will appear after you select the Workflow Plan.



- From the Responsible personnel pick-list, if it appears, select the personnel members who will be responsible for Workflow Activities scheduled in the Plan.

  Any personnel members selected will be automatically assigned as Responsible Players to every Workflow Activity scheduled in the Plan.

- From the list of Notify Only personnel, if it appears, select the personnel members who will be treated as Notify Only personnel for Workflow Activities scheduled in the Plan.

  Any personnel members selected will be automatically assigned as Notify Only Players to every Workflow Activity scheduled in the Plan.

  For more information on the meaning and role of Responsible and Notify Only Players, see Assigning Players to a Workflow Activity

- Highlight the Players in the left panel of the pick-list and click the Assign > button to select them; click the Assign All >> button to assign all Players at one time.

- To reverse the process, highlight Players you have selected in the right panel and click the Unassign < button, or click the Unassign All << button to unassign all Players at one time.

The selected Workflow Plan has now become a Plan that can be used in the Matter.

Adding Workflow Activities to a Plan

OverviewIn addition to Workflow Actions and Questions, a Workflow Plan may include Workflow Activities—Tasks, Phone Calls, Critical Dates, Appointments and Court Events. Workflow Activities may be included in a Pre-defined Workflow Plan, or added to a Plan after it is retrieved into the Workflow Plan Window. To remove a Workflow Activity it must be deleted from the Workflow Plan.

When the Workflow Plan is first inserted in the Workflow Plan Window, the Activity Date of each Workflow Activities is either scheduled automatically or the User will be prompted to schedule it manually. When a Task is completed, an Appointment, Court Event or Phone Call is held or a Critical Date has occurred, you can mark the Workflow Activity "Completed" on the Workflow Plan and a red check mark ✓ will appear next to the Workflow Activity.

- To understand how to retrieve a Workflow Plan into the Workflow Plan Window, see Retrieving a Workflow Plan.
- To understand how to add Workflow Actions to a Plan, see Adding Workflow Actions to a Plan.
- To understand how to add Workflow Questions and Answer to a Plan, see Adding Questions and Answers to a Plan.
- To understand how to activate and implement Workflow Activities, see Implementing Workflow Plans.

Adding Activities

The primary building blocks of the Workflow Plan are Workflow Activities. There are five types of Workflow Activities—Appointments, Court Events, Tasks, Phone Calls and Critical Dates. Workflow Plans are organized in hierarchical branches. A Workflow Activity can be inserted on any branch. To insert a Workflow Activity into a Workflow Plan:

1. Open an existing Matter.
2. Click on the **Workflow** tab.

If you selected a Preference to display the Workflow Plan as the default "View" in the Workflow section of a Matter, the Workflow Plan Window will already be open, displaying any Workflow Plans that have already been retrieved.

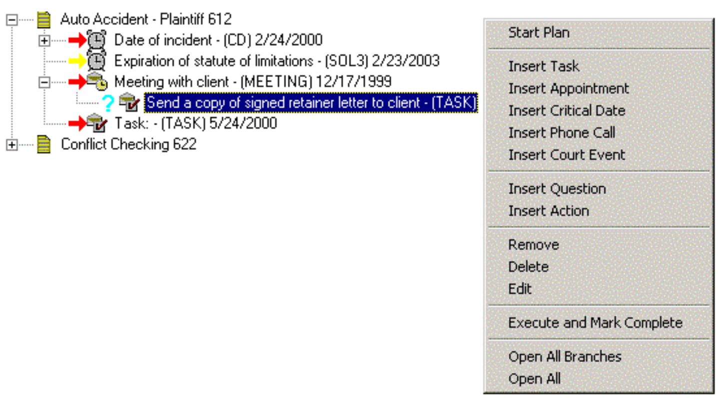
3 If the Workflow Plan Window is not in view, click on the **Plan** tab at the bottom to open it.

4 If there is more than one Plan in the Workflow Plan Window, select the Plan you will be modifying and display the branch of the plan where the Workflow Activity will be added.

If there is a ⊞ next to a Plan or a branch of a Plan, the Plan or a branch is closed.

- To open the Plan or expand a single branch of the Plan, click on the ⊞ next to the Plan (designated by the Plan icon) or select the Plan, display the Plan Menu, using the Right Mouse Button, and select **Open All Branches**.

- To expand all Plans and all branches of plans fully, display the Plan Menu and select **Open All**.



5 Highlight the branch of the existing Plan where you want to insert the Workflow Activity.

You can highlight the Plan itself or any Workflow Activity already inserted in the Plan.

- If you highlight the Plan itself, the Workflow Activity will be inserted on a separate branch directly below the name of the Plan at the end of any other Workflow Activities that were inserted in the same way.

In the above Plan, all Workflow Activities were inserted directly below the plan "Auto Accident". As a result, each now occupies its own branch in the Plan.

- If you highlight a Workflow Activity in the Plan, the new Workflow Activity will be inserted on a separate branch directly below that Workflow Activity.
In the above Plan, the Task "Send a copy of signed retainer letter to client" was inserted directly below the Appointment "Meeting with client" and it too occupies its own branch.

6 Display the Plan Menu by using the Right Mouse Button and select a Workflow Activity.

7 Select:

- **Insert Task**
- **Insert Appointment**
- **Insert Court Event**
- **Insert Phone Call**
- **Insert Critical Date**.

8 Complete the scheduling of the Workflow Activity following the instructions in Creating a New Workflow Activity. Keep in mind the following:

- **Using Workflow Templates.** Your Practice Manager Administrator may have created Workflow Templates to be used to create specific types of Workflow Activities in a Workflow Plan. Therefore, you may want to make sure Workflow Templates are activated by un-selecting **Use Default Rule** in User Preferences. See Setting Other Preferences.

- **Automatic Scheduling.** You may want the Activity Date of the Workflow Activity you are adding to be automatically scheduled by linking it to the Activity Date of a Workflow Activity that already exists in the Plan. For instance, you may want the Activity Date to be determined when another Workflow Activity is marked complete. For further information, consult Using Automatic Scheduling.

9 When you save the Workflow Activity, it will appear on the Workflow plan:

- If it's Activity Date has not been entered or calculated, it will be preceded by a ?, meaning that it is "unscheduled".
- It will be preceded by a distinctive icon, identifying the type of Workflow Activity:

  for an Appointment.

  for a Court Event.

  for a Task.

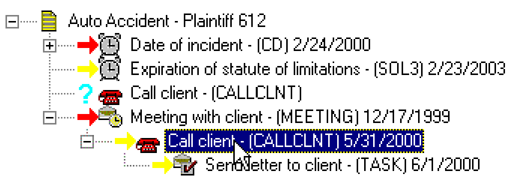
  for a Phone Call.

  for a Critical Date.

Deleting and RemovingActivities

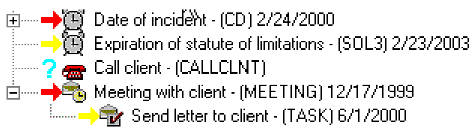
You can "Delete" or "Remove" a Workflow Activity from a Workflow Plan. When you "Delete" a Workflow Activity, it will delete all other Workflow elements located on the same "branch" of the Plan, including Workflow Actions and Workflow Questions and Answers. When you "Remove" a Workflow Activity, it will delete only the selected Workflow Activity, and any Workflow Actions assigned to it, but any Workflow Activities on branches subordinate to the removed Workflow Activity will remain in the Plan.

1 Highlight the Workflow Activity in the Workflow Plan.

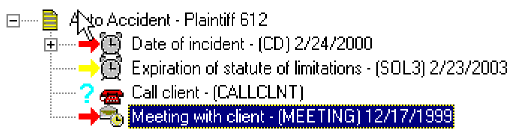


2 Display the Plan Menu using the Right Mouse Button and click **Delete** or **Remove.**

- If you click **Remove**, the selected Workflow Activity will be deleted, but any Workflow Activities located on subordinate branches will be preserved.



- If you click **Delete**, the selected Workflow Activity, and all Workflow Activities located on subordinate branches will be deleted.



Adding Workflow Actions to a Plan

OverviewIn addition to Workflow Activities and Questions, a Workflow Plan may include Workflow Actions. Workflow Actions are Templates that automatically activate features of Practice Manager or your GroupWare program when they are “executed”. Workflow Actions may be included in a Pre-defined Workflow Plan, or added to a Plan after it is retrieved into the Workflow Plan Window. After a Workflow Action is inserted, you can activate it by choosing “Execute and Mark Complete”. When it is activated, the Workflow Action launches the underlying Workflow Action Template and carries out the intended action. If a Workflow Action is carried out by designating it as “Completed”, a red check mark ✔ will appear next to the Workflow Action. To remove a Workflow Action it must be deleted from the Workflow Plan.

- To understand how to retrieve a Workflow Plan into the Workflow Plan Window, see Retrieving a Workflow Plan.
- To understand how to add Workflow Activities to a Plan, see Adding Workflow Activities to a Plan.
- To understand how to add Workflow Questions and Answer to a Plan, see Adding Workflow Actions to a Plan.
- To understand how to activate and implement Workflow Actions, see Implementing Workflow Plans.

Adding Workflow Actions

Workflow Actions are intended to activate functions required to accomplish the objectives of Workflow Activities. Workflow Actions can be divided into three categories:

- **Record Entry Templates.** When executed, a Record Entry Template creates a new record in one of the modules of Templates—a new Matter, Entity, Note, Document or Timeslip.
- **Action Templates.** When executed, an Action Template triggers an action in Practice Manager. Currently, there are two types of actions supported: (1) changing the status of a Matter in the Status Field of the Matter Information screen; and (2) retrieving a new Workflow Plan.
- **GroupWare Rules.** When executed, a GroupWare Rule initiates a GroupWare Item—E-mail, task, appointment or note—in your GroupWare application.

Workflow Actions are inserted in a Workflow Plan in the same fashion as Workflow Activities. Since they are intended to assist you to accomplish your work, they are always linked to, and inserted as a “branch” of, a Workflow Activity—either a Task, Phone Call, Appointment, Court Event or Critical Date. To insert a Workflow Action into a Workflow Plan:

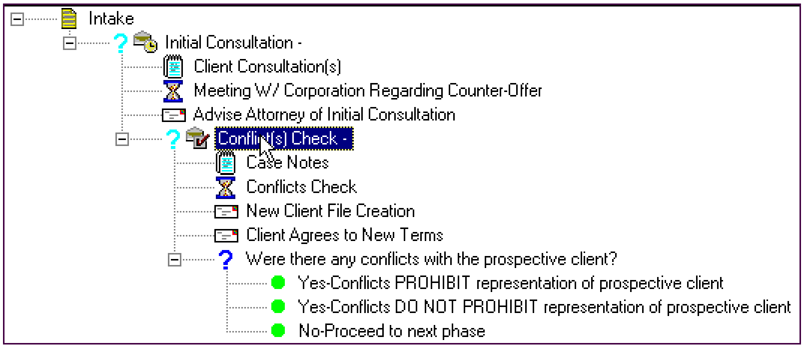
1 Open an existing Matter.

2 Click on the **Workflow** tab.

3 If you selected a Preference to display the Workflow Plan as the default “View” in the Workflow module of a Matter, the Workflow Plan Window will already be open, displaying any Workflow Plans that have already been retrieved.

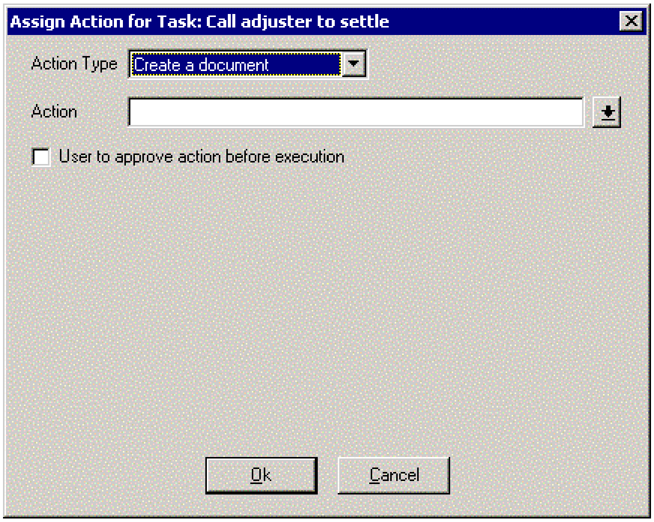
4 If the Workflow Plan Window is not in view, click on the **Plan** tab at the bottom to open it.

5 Highlight an existing Workflow Activity where you want to insert one or more Workflow Actions.



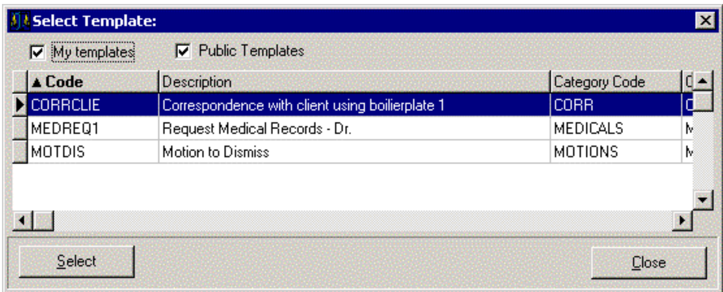
6 Display the Plan Menu by using the Right Mouse Button and select **Insert Action.**

A dialog will appear.



7 Select the type of Workflow Action you want to insert from the Action Type drop-down list. Your choices include:

- Creating a document.
- Creating a timeslip
- Creating an e-mail.
- Creating a new matter record.
- Creating a new note.
- Executing a program function, either changing the status of a Matter or starting a new Workflow Plan.
  After you select the Action Type, a list of Workflow Action Templates will be displayed:



8 Highlight a Template from the Template List and click **Select** to select and insert it in the Workflow Plan.

The Workflow Action will appear on the Workflow Plan. It will be displayed on a "branch" directly below the relevant Workflow Activity preceded by an icon to identify the type of Template used

 for an Entity Action Template.

 for a Document Action Template.

 for a Timeslip Action Template.

 for a Note Action Template.

 for a Matter Action Template.

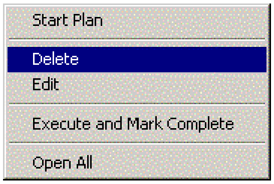
 for a Program Function Template.

 for a GroupWare Rule.

Deleting Workflow Actions

To remove a Workflow Action from a Workflow Plan, it must be deleted. To delete a Workflow Action:

1. Highlight the Workflow Action in the Workflow Plan.
2. Display the Workflow Action Menu using the Right Mouse Button and click **Delete**.



A confirmation dialog will appear. Select **Yes** to remove the Workflow Action; select **No** to cancel the deletion.

The Workflow Action will be removed from the Workflow Plan.

Adding Questions and Answers to a Plan

Overview

In addition to Workflow Activities and Workflow Actions, a Workflow Plan may include Workflow Questions and Answers. You add Workflow Questions and Answers to a Workflow Plan to indicate alternative choices, options or issues with each Answer to a Question representing a different option or resolution that can be selected. Workflow Activities, Workflow Actions and other Workflow Questions can be linked to each Answer inserted in the Plan. Selecting one of the alternative Answers opens as a new “branch” or “path” of the Plan, allowing the Workflow Activities and Actions that correspond to that answer to be revealed and implemented. The other Answers remain closed and any Workflow Activities or Actions assigned to their respective branches will not be implemented. To remove Workflow Questions and Answers, you delete them from the Workflow Plan.

- To understand how to retrieve a Workflow Plan into the Workflow Plan Window, see Retrieving a Workflow Plan.
- To understand how to add Workflow Activities to a Plan, see Adding Workflow Activities to a Plan.
- To understand how to add Workflow Actions to a Plan, see Adding Workflow Actions to a Plan.
- To understand how to activate and implement Workflow Activities, see Implementing Workflow Plans.

Adding Workflow Questions and Answers

Workflow Questions can be linked to and inserted as a "branch" of a Workflow Activity—either a Task, Appointment, Court Appointment, Phone Call or Critical Date. To insert Workflow Questions and Answers into Workflow Plan:

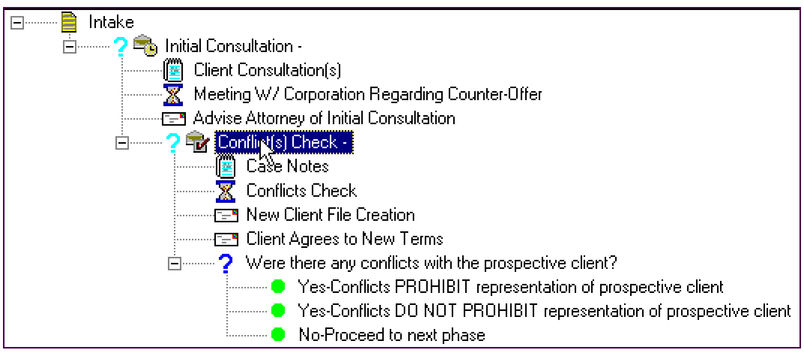
1 Open an existing Matter.

2 Click on the **Workflow** tab.

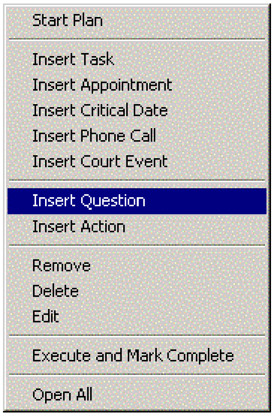
If you selected a Preference to display the Workflow Plan as the default "View" in the Workflow section of a Matter, the Workflow Plan Window will already be open, displaying any Workflow Plans that have already been retrieved.

3 If the Workflow Plan Window is not in view, click on the **Plan** tab at the bottom to open it.

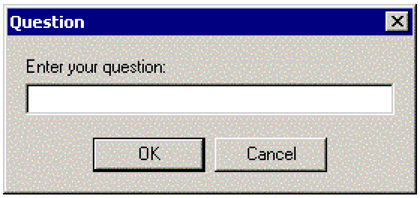
4 Highlight an existing Workflow Activity where you want to insert a Workflow Question.



5 Display the Plan Menu by using the Right Mouse Button and select **Insert Question.**



The Question dialog appears.



6 Enter the Question in the Question dialog.

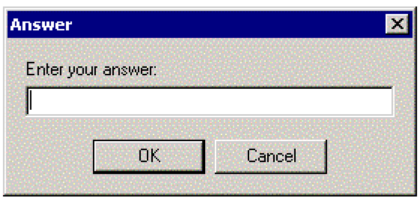
For example, “Did the defendant file an answer or motion?”

- Click **OK** to save the Question.
- Click **Cancel** to cancel the Question.

7 Highlight the Answer, display the Plan dialog again and select **Answer**.

The Answer dialog will appear.

8 Enter an Answer for each option suggested by the original Question.



For example, “Defendant filed an answer to complaint.”

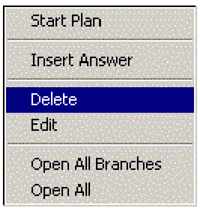
- Click OK to save the Answer.
- Click **Cancel** to cancel the Answer.

Note: *Each Answer you have inserted can be treated as a separate branch and you can insert Workflow Activities, Workflow Actions and additional Questions and Answers on each branch.*

Removing Workflow Questions and Answers

To remove a Workflow Question or Answer, it must be deleted from the Plan. When you delete a Question or Answer, it will delete all other Workflow elements located on the same "branch" of the Plan. Thus, for instance, if you delete a Question, it will remove all of the associated Answers and all of the Workflow Activities and Actions linked to each Answer. To delete a Workflow Question or Action:

1. Highlight the Workflow Question or Answer in the Workflow Plan.
2. Display the Plan Menu using the Right Mouse Button and click **Delete**.



The highlighted entry and all associated elements will be removed from the Workflow Plan.

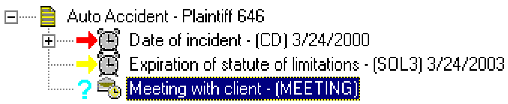
Implementing Workflow Plans

A Workflow Plan represents an outline of the events and deadlines you expect to occur, the tasks required to fulfill the objectives of your Client and the computer-based actions you can activate to accomplish those tasks.

Activating a Workflow Plan

To activate a Workflow Plan, it must be retrieved into the Plan Window of a Matter. At the time when it is activated, the automatic scheduling rules that determine the Activity Date of each Workflow Activity will go into effect. If the Workflow Activity calls for the User to enter the date manually, Practice Manager will display a dialog where the date can be entered.

The status of Activity Dates will be displayed on the Workflow Plan.



- **Activity Date Has Occurred.** If the Activity Date is today or has already passed, the Workflow Activity will be marked with a red arrow.
- **Activity Date in Future.** If the Activity Date is scheduled to occur in the future, the Activity Date will be marked with a yellow arrow.
- **Unscheduled Activity.** If Activity Date has not yet been entered, or cannot be calculated until another Activity has been marked completed, the Activity Date will be marked with a question mark ?.

Notification of Workflow Activities

Practice Manager uses the Workflow Calendars to give you notice of Workflow Activities. If you set one or more Ticklers, the Workflow Activities included in a Plan will appear on your Tickler in your Workflow Calendars at specified intervals prior the Activity Date. On the Activity Date, the Workflow Activities themselves will appear on your calendar. When it comes time to focus on a Workflow Activity, you can open the Plan Window in the Matter or open the Workflow Activity itself from the Workflow Calendars or the Workflow

Listings, which will take you directly to the location of the Workflow Activity on the Plan Window.

Completion of Workflow Activities

To implement the Workflow Plan, your task is to complete the Workflow Activities included in the Plan. In the course of completing the Workflow Activities, you will

- **Schedule Workflow Activities** that were not scheduled automatically when the plan was activated by providing Due Dates and Event Dates and setting Ticklers for those Workflow Activities. See Scheduling Unscheduled Workflow Activities.
- **Complete Workflow Activities and Actions.** Marking Workflow Activities completed can automatically schedule other Workflow Activities and launch Workflow Actions that initiate Practice Manager or GroupWare functions used to accomplish the purpose of the Workflow Activities. See Executing Workflow Actions.
- **Select Answers to Workflow Questions** representing choices or options included in the Plan which may disclose other "branches" of Workflow Activities and Actions needed to pursue the chosen option. See Selecting Workflow Answers.

Scheduling Unscheduled Workflow Activities

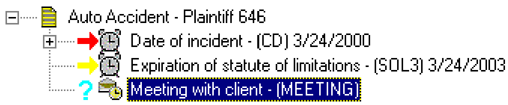
One of the primary functions of a Workflow Plan is to schedule Workflow Activities automatically. This is done by linking the Activity Date of Workflow Activities in the Plan to other dates that have already been determined. Ideally, all dates in your Workflow Plan will be scheduled automatically, but there may be instances when this cannot be done. For instance, your Workflow Plan may include a Pretrial Conference which cannot be scheduled until you receive notice from the Court. In such cases, the Workflow Activity will appear on your Workflow Plan without a date and you will have to enter the Activity Date manually. When you schedule a Workflow Activity, you can enter a specific date or you can use Automatic Scheduling options to calculate the Activity Date based upon another date in the Matter.

Locating Workflow Activities That Must Be Scheduled Manually

There are several ways to keep track of Workflow Activities that have not been scheduled.

On the Plan

A Workflow Plan can include both scheduled and unscheduled Workflow Activities. All unscheduled Workflow Activities are identified by a blue question mark: ?.



On the Workflow Listings

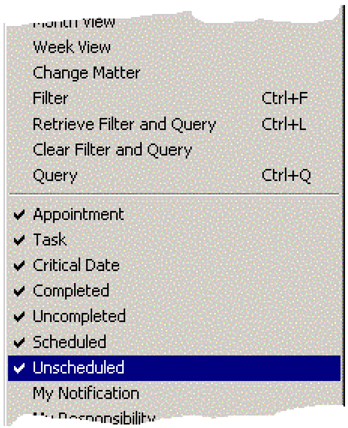
You can display unscheduled Workflow Activities on the Global and Matter Workflow Listings. To do so:

1. Display the Global Workflow Listing or the Workflow Listing in the Matter. See Displaying Workflow Listings and Calendars.

2. Display the View Menu.

   - Click the Right Mouse Button

   - Select the **View** from the Practice Manager Menu.



3. Select **Unscheduled** from the Menu.

   All Workflow Activities that have been created without a specific Activity date will now be included in the Workflow Listing.

- To display **only** unscheduled Workflow Activities, unselect **Scheduled** from the View Menu.
- To display Workflow Activities of a specific type, use the Activity Type filters on the View menu or on the Filter Bar.

On the Workflow Calendars

If you enable the Unscheduled filter (see previous topic), all unscheduled Workflow Activities will appear in a group on the Workflow Calendars under the title "Unscheduled".

Scheduling the Activity Date

Once you have located an unscheduled Workflow Activity, you can schedule it by entering a specific date or by using Automatic Scheduling options to link it to the Activity Date of another Workflow Activity in the Matter or another date in the Practice Manager database.

Entering a Specific Date

To enter a specific Activity Date for the Workflow Activity:

1. Open the applicable Workflow Plan, if necessary, and highlight the Workflow Activity being scheduled.
2. Display the Plan menu using the Right Mouse Button and select **Edit** or double-click on the Workflow Activity.

   The scheduling dialog for the specific type of Workflow Activity will appear.
3. Enter the date for the Workflow Activity and the time, if it is an Appointment.

   For assistance in using Date-entry and Time-entry fields, see Entering Dates and Time.
4. If appropriate, set or modify Ticklers for the Workflow Activity.

   For more information on Ticklers, see Using Ticklers.
5. Click **Save** to save and close the Workflow Activity screen; click **Cancel** to close the screen without saving the changes.

Using Automatic Scheduling Options

You can also cause a Workflow Activity to be scheduled automatically by using Automatic Scheduling options located on the Automatic Scheduling tab of a Workflow Activity. Automatic Scheduling options function the same way when scheduling an unscheduled Workflow Activity in a Plan as when you use Automatic Scheduling options in a Workflow Activity created outside a Plan. Using Automatic Scheduling, you can schedule the Activity Date of a Workflow Activity automatically by linking its Due Date or Event Date to the Activity Date of another Workflow Activity or to another date in the Matter.

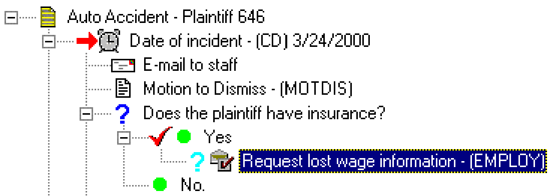
To schedule the Activity Date using Automatic Scheduling:

1. Open the applicable Workflow Plan, if necessary, and highlight the Workflow Activity being scheduled.
2. Display the Plan menu using the Right Mouse Button and select **Edit** or double-click on the Workflow Activity.

   The scheduling dialog for the specific type of Workflow Activity will appear.
3. Click on the Automatic Scheduling tab.
4. Choose the Automatic Scheduling option you want to use.
   - To schedule the Activity Date based upon the Activity Date of another Workflow Activity, choose “Set Event Date based on another Activity”.
   - To schedule the Activity based upon another date in the Matter, choose “Set Event Date based on a date field in a Matter”.
5. Complete the Automatic Scheduling option you have chosen by following the instructions in Using Automatic Scheduling.
6. Click **Save** to save the Workflow Activity and close the Workflow Activity screen; or click **Cancel** to close the screen without saving the Workflow Activity.

Answering Workflow Questions

The Answers to Workflow Questions in a Workflow Plan signify the various choices that are available at a particular point in the Plan. Each Answer can be the starting point for a new branch of the Plan, including its own Workflow Activities, Workflow Actions and Questions. Unless you selected the option **Show All Paths** when the Workflow Plan was retrieved into the Plan Window, Workflow Activities and Actions linked to an Answer will not be visible. To activate them and make them visible, you must select the specific Answer to which they are linked. When you do so, the Answer's branch opens, revealing the associated Workflow elements and a red check mark appears next to the Answer, indicating that it has been selected.



Answers can be selected manually or automatically. Answers will be presented to you automatically when you complete a Workflow Activity to which a Workflow Question is linked.

Selecting an Answered Manually

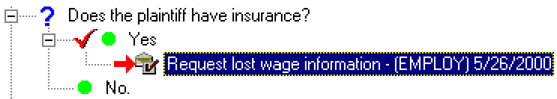
You can answer a Workflow Question at any time by selecting one of the Answers presented on the Workflow Plan window. You can also change your mind by "unselecting" an Answer.

To select an Answer:

1. Highlight the Answer in the Workflow Plan. An Answer is preceded by a green dot.

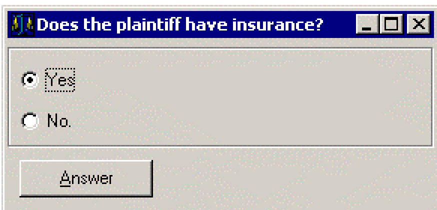
2. Display the Plan Menu using the Right Mouse Button and choose **Select Answer.**

A red check mark will appear next to the Answer, indicating that it has been selected. The branches of the Plan directly below the Answer will open and become visible.



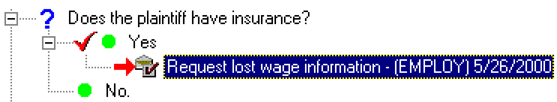
Automatically Answering Workflow Questions

When you mark a Workflow Activity completed, any unanswered Workflow Questions linked to it will be presented to you automatically in a dialog where they can be answered. See Completing Workflow Activities in a Plan.



Choose the correct answer and then click the **Answer** button.

The selected Answer will be displayed in the Workflow Plan marked by a check mark. Any Workflow Activities associated with the answer will be displayed on the Plan Window.



Completing Workflow Activities in a Plan

A Workflow Activity included in a Plan can be tracked on the Workflow Listings and Calendars as well as the Plan itself. To give you a complete record of the history of Workflow Activities, Practice Manager allows you to mark Workflow Activities completed. When you mark a Workflow Activity completed that is included in the Plan, the date of completion can be entered into the Practice Manager database. To signify completion, a red check mark appears next to the Workflow Activity on the Workflow Calendars as well as the Workflow Plan; it can also be displayed in the Workflow Listings. For instructions on marking a Workflow Activity completed that is not included in a Workflow Plan, see Marking Workflow Activities Completed.

When you mark a Workflow Activity completed in a Plan, Practice Manager will automatically:

- **Execute Actions** execute any Workflow Actions that are linked to the Workflow Activity, see Executing Workflow Actions in a Plan; and

- Answer Workflow Questions present any Workflow Questions linked to the Workflow Activity, allowing you to select answers from a dialog, see Answering Workflow Questions.

Significance of Marking Workflow Activities Completed

Marking a Workflow Activity completed and entering a completion date has different significance, depending upon the type of Workflow Activity. See Marking Workflow Activities Completed.

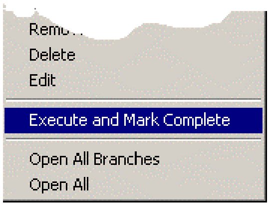
Mechanics of Marking Workflow Activities Completed

You can mark a Workflow Activity in a Plan completed from the Plan itself, the Workflow Listings and the Workflow Calendars. When you mark such a Workflow Activity completed from the Workflow Listings or Calendars, you will be first taken to the branch on the Workflow Plan where it is located.

From the Workflow Plan

1 Open the Workflow Plan and locate the Workflow Activity that you want to mark completed. To access a Workflow Plan, see Retrieving a Workflow Plan.

2 Select the menu item used for marking the Workflow Activity Complete.



The exact language used to signify marking the Workflow Activity completed will depend upon the type of Workflow Activity. For Tasks, for instance, it will say “Execute and Mark Complete”.

A dialog used for entering completion information will be displayed. It will include today’s date.

Mark the Workflow Activity Completed

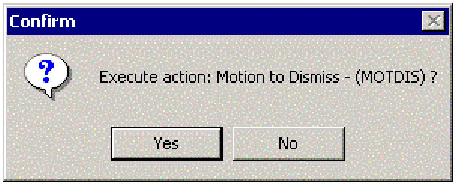
3 Enter the date that the Workflow Activity was actually held, completed or complied with. You can accept the date displayed or enter a different date.

4 If you want to enter information in the Progress field, click on the “Update the Progress field to read” checkbox. For more information on the use of the Progress field, see Marking Workflow Activities Completed.

5 When you are done, click **Ok** to update the Workflow Activity or **Cancel** if you change your mind.

6 If any Workflow Actions are executed, enter any necessary information and complete them. Any Workflow Actions linked to the Workflow Activity in the Plan will be executed automatically when the Workflow Activity is marked complete.

- If the option “User to approve action before execution” was selected when the Workflow Action was created, a dialog will appear, prompting you to confirm that you want to execute the Action.

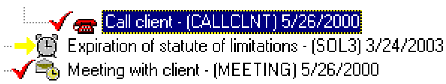


- Select **Yes** to execute the Workflow Action; click **No** to cancel execution of the Workflow Action.

7 If any Workflow Questions are presented, select the applicable Answer. See Answering Workflow Questions.

Any Workflow Questions linked to the Workflow Activity in the Plan will be automatically presented in a dialog together with the applicable answers.

A red check mark ✓ will appear at the beginning of the Workflow Activity, signifying that it has been marked complete.



From the Workflow Listings

1 Display the Workflow Listing where the Workflow Activity appears. See Displaying Workflow Listings.

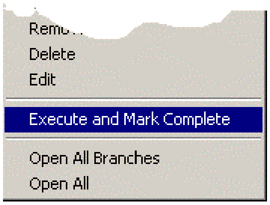
2 Locate the Workflow Activity that you want to mark completed. See Searching the Workflow Listings.

3 Open the Workflow Activity or highlight it in the Workflow Listing:

- If you open the Workflow Activity, you will be taken to the location on the Plan where the Workflow Activity is located. Click the Right Mouse Button and display the Plan Menu.If you highlight the

Workflow Activity, display the View Menu by clicking the Right Mouse button or selecting View from the Practice Manager Menu.

4 Select the menu item used for marking the Workflow Activity completed.



The exact language used to signify marking the Workflow Activity completed will depend upon the type of Workflow Activity. For Tasks, for instance, it will say "Execute and Mark Complete".

A dialog used for entering completion information will appear. It will include today's date.

5 Fill in the information on the dialog and complete the Workflow Activity as discussed under **Mark the Workflow Activity Completed** above.

From the Workflow Calendars

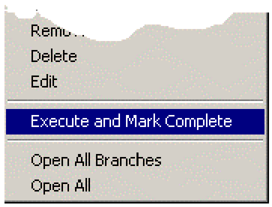
1 Display the Workflow Calendar where the Workflow Activity appears. See Displaying Workflow Listings and Calendars.

A Workflow Activity appears on the Workflow Calendars on the Due Date (if it is a Task) or the Event Date (if it is a Court Event, Appointment, Phone Call or Critical Date). You can also access a Workflow Activity from the Tickler list on the Workflow Calendars. If it is overdue, it will appear on the Overdue branch of your calendar.

2 Open the Workflow Activity or highlight it on the Workflow Calendar.

- If you open the Workflow Activity, you will be taken to the location on the Plan where the Workflow Activity is located. Click the Right Mouse Button and display the Plan Menu.
- If you highlight the Workflow Activity, display the View Menu by clicking the Right Mouse button or selecting View from the Practice Manager Menu.

3 Select the menu item used for marking the Workflow Activity completed.



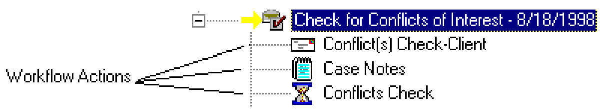
The exact language used to signify marking the Workflow Activity completed will depend upon the type of Workflow Activity

A dialog used for entering completion information will appear. It will include today's date.

4 Fill in the information on the dialog and complete the Workflow Activity as discussed under **Mark the Workflow Activity Complete** above.

Executing Workflow Actions in a Plan

Workflow Actions are used to implement or accomplish the purposes of Workflow Activities listed in a Workflow Plan. Workflow Actions will always be associated with a particular Workflow Activity and will appear directly below that Activity on the Workflow Plan.



You can activate one or more of the associated Workflow Actions in one of two ways:

- **Execute and Mark Complete** the Workflow Action itself.
- **Execute and Mark Complete** the Workflow Activity to which it is linked. For details on marking Workflow Activities completed, see Completing Workflow Activities in a Plan.

When you "Execute and Mark Complete" a Workflow Action, Practice Manager activates a function of Practice Manager or GroupWare, using a Workflow Template. When you "Complete" a Workflow Action, Practice Manager "Executes" the Workflow Action and also marks it "Completed" with a red check mark ✓. After you complete a Workflow Action, you can “unmark” it to remove the check mark, but that will not delete or otherwise modify any record you have created or modified.

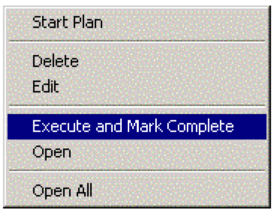
By Marking Workflow Actions Completed

You can execute and mark completed any individual Workflow Action included in a Plan.

1 Open the Plan.

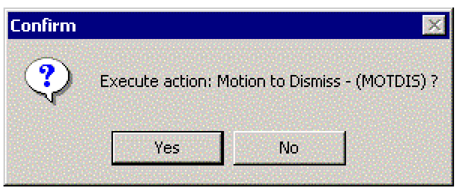
2 Select and highlight the Workflow Action in the Plan.

3 Display the Plan Menu using the Right Mouse Button.



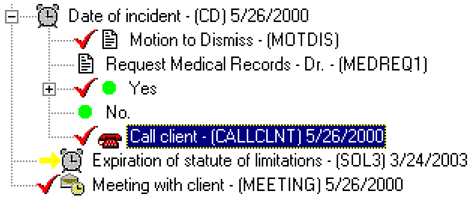
4 Select **Execute and Mark Complete** to activate the Workflow Action Template assigned to the Workflow Action.

If the option “User to approve action before execution” was selected when the Workflow Action was inserted in the Plan, a confirmation dialog will be displayed.



– Select **Yes** to execute the Workflow Action.

– Select **No** to cancel execution of the Workflow Action.



The Workflow Action will execute the Workflow Action template or program function and be marked completed. A red check mark will appear on the Workflow Plan.

By Marking a Workflow Activity Complete

When you mark a Workflow Activity completed, it will automatically execute all Workflow Actions that are directly linked to it. For more information on executing Workflow Actions in this way, see Completing Workflow Activities in a Plan.

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Using GroupWare

Overview of GroupWare

The GroupWare module allows you to integrate the functions and organizational advantages of Practice Manager with your groupware program, be it Microsoft Outlook or Exchange. Normally, you will want to use the Workflow module to schedule appointments and tasks, as this module is specially tailored to suit the needs of attorneys. However, if your office would prefer to conduct scheduling through Microsoft Outlook, say, you will be able to do this, while also retaining the ability to keep track of appointments and tasks from within a matter or just generally from within Practice Manager. One disadvantage to relying on GroupWare for all scheduling is that you cannot track critical dates—deadlines and statutes of limitations—as well as in the Practice Manager Workflow module. Based upon the needs of your office, you can utilize Groupware features in conjunction with the workflow module to whatever extent you wish.

One huge advantage to Practice Manager's Groupware feature is the integration with your e-mail program. Initiate email composition directly from within Practice Manager. Related messages are saved within the program and can be linked to the matter to which they relate. Incoming email messages can be quickly and easily copied into Practice Manager using the "drag and drop" feature. This will allow you to have all related records available to you from within the Practice Manager matter groupware listing, thus creating a centralized place for all communications which would otherwise be stored in separate attorneys' inboxes or other folders.

Several GroupWare Templates that relate to a common event–such as an appointment or a task–can be organized into a "Batch" and scheduled together, automatically scheduling the group of GroupWare Items based upon a common date. Each GroupWare Item will include the Matter name and number assigned in Practice Manager, and will appear on the Global GroupWare Listing or the Matter GroupWare Listing where it was scheduled. Although the GroupWare and Workflow modules function independently, they can be linked by using Workflow Action Templates available when you create Workflow Plans. Thus, when you schedule a Workflow item—a Task, Appointment or Critical Date—in a Workflow Plan, you can execute an Action Template that will schedule the same task, appointment or critical date in your GroupWare application at the same time.

Based upon the relative strengths of the two types of workflow processing systems, we suggest you utilize their functionality in the following way:

- **E-Mail Messages and Faxes.** Use your GroupWare E-mail system to transmit and receive all internal and external E-mail messages (and faxes if you use a fax gateway or Rightfax) and keep track of both incoming and outgoing messages in your GroupWare Listings.
- **Tasks, Appointments and Critical Dates.** Schedule your Tasks, Appointments and Critical Dates in the Practice Manager Workflow module.
- **Workflow Plan.** Try to use Workflow Plans to schedule all Workflow items for your Matters. If you use Workflow Plans, you can incorporate Workflow Action Templates. These templates can be used to simultaneously initiate GroupWare Items—such as E-mail messages or tasks—to alert individuals both inside and outside of your office by E-mail of important events.

Using the GroupWare Listing

What You Can Do From GroupWare Listings

Practice Manager integrates seamlessly with your GroupWare program—either Microsoft Exchange or Microsoft Outlook. To give you the ability to manage GroupWare Items, a record of every GroupWare Item generated in your GroupWare program is automatically created in Practice Manager and displayed in the GroupWare Listings. Like the Workflow module, GroupWare utilizes two types of Listings: the Global GroupWare Listing and the Matter GroupWare Listing. The Global GroupWare Listing is a list of all GroupWare Items for all of your Matters. The Matter GroupWare Listing displays only those GroupWare Items that have been scheduled in the Matter that is open. From either of the GroupWare Listings you can schedule new GroupWare Items, modify and resend GroupWare Items that have been transmitted, and filter and sort the GroupWare entries for use in creating reports and schedules for your Matters. Whatever is displayed on a GroupWare Listing can be viewed in the GroupWare Calendars, which are accessed from the GroupWare Listings. From the GroupWare Listings, you can:

- ♦ Create a GroupWare Item. Schedule a new task or appointment or send an e-mail, or note.
- ♦ View, Resend, Delete or Complete a GroupWare Item. View, resend or delete a GroupWare Item or mark it completed.
- ♦ View the GroupWare Calendar. View GroupWare items in Calendar format for easy organization.
- ♦ Change the GroupWare Listing Layout. Change the order, size and number of fields displayed on the GroupWare Listings.
- ♦ Sort GroupWare Listings. Sort GroupWare Items by date, type or other fields in ascending or descending order.
- ♦ Search the GroupWare Listing. Search for specific GroupWare records by date, Subject, Matter or any other field displayed on the GroupWare Listing, using the QuickSearch Window.
- ♦ Filter the GroupWare Listing. Using QuickFilters, a User-defined Filter or a Query, display particular groups of GroupWare Items, using selection criteria such as date range, Type, Jurisdiction or Priority.
- ♦ Print the GroupWare Listing After filtering and sorting the GroupWare Listing, print the resulting list of GroupWare Items as a GroupWare report to the screen, a printer or a text file.

Displaying GroupWare Listings

Practice Manager gives you access to two GroupWare Listings—the Global GroupWare Listing and the Matter GroupWare Listing.

Display the Global GroupWare Listing

The Global GroupWare Listing lists all GroupWare Items scheduled in Practice Manager for all Matters. To access and display the Global GroupWare Listing:

- ♦ From the Practice Manager Toolbar.

Click the GroupWare Listing  on the Practice Manager Toolbar.

- ♦ From the Practice Manager Menu.

  Select **File** and then **Open** and then select **GroupWare** from the Practice Manager Menu.

- ♦ Using the Shortcut Key.

  Strike the F11 function key.

Display the Matter GroupWare Listing

Whenever you open a Matter, Practice Manager includes a GroupWare Listing of all GroupWare Items scheduled in that Matter. To display the Matter GroupWare Listing:

1. Select and open an existing Matter.
2. Click on the **GroupWare** tab just below the Practice Manager Toolbar.

Changing the GroupWare Listing Layout

The columns of a GroupWare Listing display, in list format, information from GroupWare Items—Appointments, Notes, Tasks, E-mails—that have been scheduled using your GroupWare application. The number, order and size of the columns can be changed to disclose the information you want to view.

What Columns Should Be Displayed

For daily use, you should choose to include columns that are the most useful in organizing the GroupWare Items in your office. You can temporarily change the column layout when generating special-purpose lists for reports. The following column fields are useful for daily monitoring of GroupWare Items:

- ♦ **Start Date.** The date an Appointment will take place or a Task will appear on your GroupWare calendar.
- ♦ **Type.** The type of GroupWare item—appointment, task, note, phone message, e-mail or fax.

- **Time From.** The time an Appointment begins.
- **From.** The person who scheduled the GroupWare item.
- **To.** The recipient of the GroupWare item.
- **Subject.** The subject or description of the GroupWare Item.
- **Priority.** The relative urgency of the GroupWare Item.
- **Status.** The current status of the GroupWare Item.
- **Location.** The location of an Appointment.

Adding, Removing, Ordering and Resizing Columns

You can add, remove, order and resize columns on a GroupWare Listing, just like other Listings. For detailed information on how to change the layout of Listings, see Listing Components and Controls and Customizing the Listing Layout.

Searching GroupWare Listings

You can use the QuickSeach Window to locate a GroupWare Item. To search for a GroupWare Item, you must select the field to be used for the search and set it as the Sort Field. For more detailed information on searchingListings in general, see Searching for Records in Listings.

Search theGroupWare Listing

1. Limit the number of items displayed, if you want, using the QuickFilters, a User-defined Filter or a Query. For instance, you could limit the GroupWare Items to those of a particular type for a particular date range.
2. Choose the Sort Field for the search, such as Subject. See Sorting GroupWare Listings.
3. Type the first few characters of the first word or words applicable to the Sort Field you are trying to match.

   As you type, the QuickSearch Window will open, displaying the characters you have entered.

4 If you can only remember a portion of the words you are using for the search, place the wildcard character “*” (an asterisk) before the search string. This allows you to search for GroupWare Items **containing** particular characters. Thus, for instance, if you are searching the Subject field for all Hearings, typing "*Hearing" would display every GroupWare Item that contained that word at any location in the Subject field.

5 To clear the QuickSearch window for a new search,

- Delete the characters in the QuickSearch Window
- Hit the Esc key on your keyboard
- Double-click on another column heading in the GroupWare Listing.

Sorting GroupWare Listings

The GroupWare Listing can be sorted by any field displayed, in ascending or descending order, alphabetically or numerically, depending upon the field. You will probably choose to sort GroupWare Items by the **Start Date** in descending order. You select the Sort Field and change the sort order of the GroupWare Listing, just like other Listings. See Sorting Listings.

Select the Sort Field and Set the Sort Order

1 If the Sort Field does not appear as a column heading on the Column Heading Bar, add the desired column to the GroupWare Listing layout.

2 Double-click on the column of the field in the Column Heading Bar to choose the field and sort it in ascending order, indicated by the ▲ symbol. To change to descending order, double-click again. The sort indicator will change to ▼.

An alternate way to change the sort order: Point to the column to be used for sorting, display the Column Control Menu and choose “Ascending” or “Descending” from the menu.

3 The new sort order will remain in effect until you close the GroupWare Listing. To **Save** the selected sort options, right mouse click on the Column Heading Bar and select **Save Grid Layout** from the menu.

Filtering GroupWare Listings

You can limit the number of GroupWare Items displayed in a GroupWare Listing using QuickFilters, User-defined Filters or Queries. In User Preferences, you can set options that activate a specific Filter or Query for the GroupWare Listings or present the list of Filters and Queries each time you open a GroupWare Listing. See Setting Filter Options for Listings.

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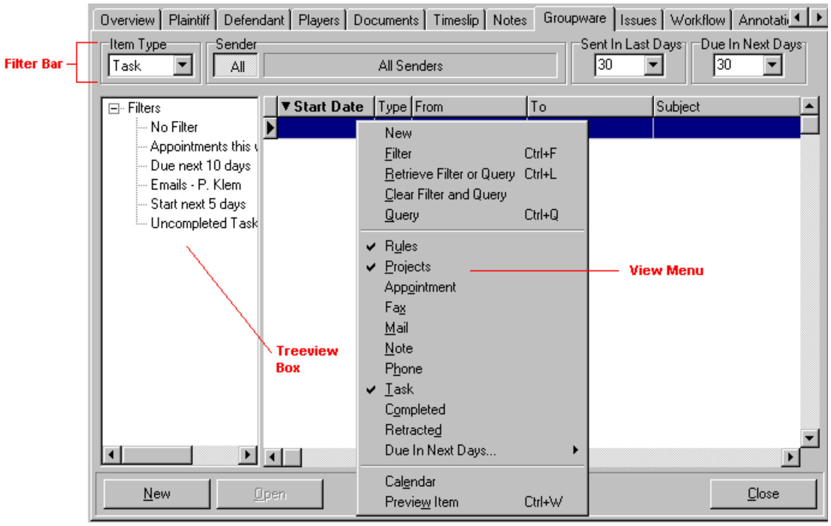
QuickFilters

Select one or more of the QuickFilters from the Filter Bar to limit the records displayed. For detailed information on QuickFilters and the use of QuickFilter controls, see Using QuickFilters and Listing Components and Controls.



Selecting:

- **Item Type:** Displays all GroupWare Items in the GroupWare Listing of a particular Type—Appointment, Fax, E-mail, Note, Phone message or Task.
- **Projects:** Displays all Batch Projects.
- **Sender:** The personnel member who sent the GroupWare Item.

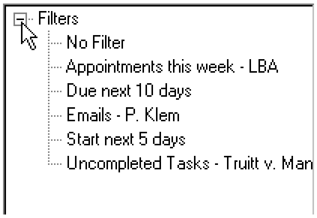
- **Sent in Last Days:** Displays all GroupWare Items scheduled within the stated period of days—30, 60, 90, 180 or 365.
- **Sent in Last Days:** Displays all GroupWare Items scheduled within the stated period of days—30, 60, 90, 180 or 365.
- **Due in Next Days:** Displays all of the Appointments that are scheduled during the state period of days--30, 60, 90, 180 or 365.
- **Completed (View Menu only):** GroupWare Items that have been marked completed.
- **Retracted (View Menu only):** GroupWare Items that have been retracted due to rescheduling.
- **Calendar:** Switch from Listing view to Groupware Calendar view.
- **Preview Item:** Select this to preview a highlighted Groupware item. The listing display will switch to Preview mode. To preview another item, highlight it in the listing. To de-activate Preview, right mouse click and deselect by clicking on **Preview Item** again

User-defined Filters and Queries

You can create, save and retrieve Filters and Queries, based upon one or a combination of several fields included in a GroupWare Item that are not available using a QuickFilter, such as Law Type or Status. For detailed information on using User-Defined Filters and Queries, see Creating Filters to Select Records and Using Queries to Filter Listings.

Retrieving a Saved Filter from the TreeView panel

You are able to save and retrieve filters in the Groupware Listing just as you would in any of Practice Manager's listings. See Creating Filters to Select Records for details. In addition to this, the Groupware Listing includes a convenient Filter retrieval feature in the TreeView panel on the left side of the Groupware Listing Screen. (Unlike some other screens, the "Float TreeView" option in Preferences does not apply to the Groupware Listing. Here the TreeView panel is always visible and cannot be hidden.)



Displayed in Windows Explorer-like format, the TreeView Filter option allows you to view saved filters at a glance and make a selection from the list.

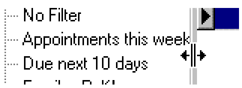
To view all saved filters available from the Groupware Listing TreeView panel:

- Click the ⊞ to the left of the **Filters** selection, or
- Simply double-click on **Filters**.

  The ⊞ will change to a ⊟ and the list of filters will open.

  Note: if a filter name is too long to display completely in the TreeView panel, simply pass your cursor over it and the full name will appear in a pop-up.

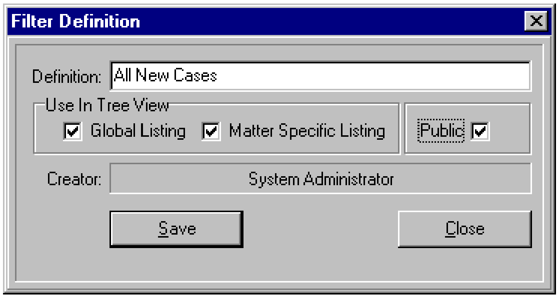
Or you can expand the width of the TreeView panel by running your cursor over the right edge of the box until it turns into a double arrow. Then click and drag to the desired size.



To put a filter into effect, simply double-click on it. To clear it, double-click on the **No Filter** option.

Not all Saved Groupware Filters may appear under TreeView

For a saved filter to appear here in the TreeView panel, this option must have been specified when the filter was saved originally. This is done by checking off the appropriate boxes in the Save Filter dialog:



Under **Use in TreeView** there are two choices. Select one or both:

- **Global Listing.** Check this box and the filter will appear as a selection under **Filters** in the TreeView panel of the Global Groupware Listing.
- Matter Specific Listing. Check this box and the filter will appear as a selection under Filters in the TreeView panel of any Matter's Groupware Listing.

(For complete details on how to create and save a filter see Creating Filters to Select Records.)

The GroupWare Calendars

In Practice Manager, certain GroupWare Items—GroupWare Tasks, Appointments and Notes—can be displayed in the GroupWare Calendar. There are two GroupWare Calendars. The Global GroupWare Calendar displays GroupWare Items for all Matters. The Matter GroupWare Calendar allows you to schedule and display GroupWare Items for a particular Matter. The GroupWare Calendars are an alternative display of the GroupWare Listings and in fact, you can only access the GroupWare Calendars from the GroupWare Listings. When you display a GroupWare Calendar, you will see exactly the same GroupWare Items that appear in the corresponding GroupWare Listing. **In other words, the filters you have applied in the GroupWare Listings will apply to the GroupWare Calendar**. The GroupWare Calendars can be displayed in three different views—a day; a week; and a month at a time. You can print the GroupWare calendars to a printer.

- To create a new GroupWare Item from the GroupWare Calendar, see Creating a GroupWare Item.
- To delete a GroupWare Item from the GroupWare Calendar, see Deleting a GroupWare Item.

Display a GroupWare Calendar

1 Display the Global GroupWare Listing or the Matter GroupWare Listing. See Displaying GroupWare Listings.

2 Use QuickFilters, a User-defined Filter or a Query to select the GroupWare Items you want to display. See Filtering GroupWare Listings.

3 From the View Menu, select Calendar. The GroupWare Calendar will appear, displaying the current day, week or month, depending upon what Default View you have chosen in Preferences. See Setting Other Preferences.

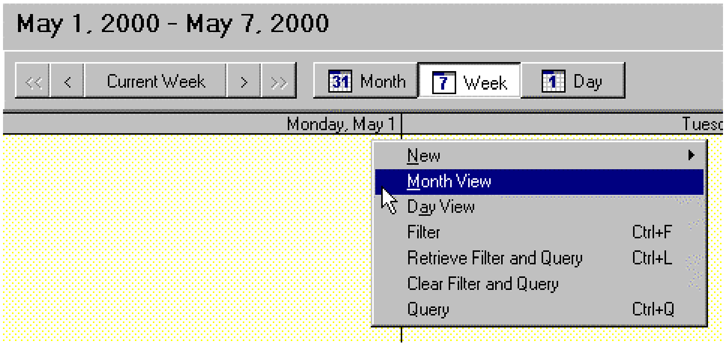
4 To change the month being viewed, use the control buttons located on the top left corner of the GroupWare Calendar:

- Click on the “>” button to display the next month or the “<” button to display the previous month.
- Click on the “>>” button to display the same month in the next year or the “<<” button to display the same month of the previous year.
- Click on “Current Month” to return to the current month.

5 Click **Close** to close the calendar and return to the GroupWare Listing.

Changing the Calendar View

You can display GroupWare Calendars in three different views—daily, weekly or monthly. Use the date display buttons located above the Calendar or the dialog displayed by clicking the Right Mouse Button to change the view.



- Select **Month View** or click the **Month View** button to change to the monthly view of the GroupWare Calendar.
- Click **Day View** or click the **Day View** button to change to the daily view of the GroupWare Calendar.
- Click **Week View** or click the **Week View** button to change to the weekly view of the GroupWare Calendar.

Printing the GroupWare Calendar

You can also print the GroupWare Calendar.

1. Select the view of the Calendar you want to print.
2. Depending upon the view displayed, select the particular day, week or month you want to display.
3. Select the **Print** button. The Print dialog appears.
4. Select **OK** to print or **Cancel** to cancel printing.

Printing GroupWare Listings

The GroupWarecan be used to create reports for your office. The columns you select for the GroupWare Listing layout are used for the columns of the report; the Sort Field is used to order the records in the layout; and QuickFilters, User-defined Filters or Queries are used to select the records for the report. The resulting record display can be viewed, printed or saved in a file.

Creating GroupWare Reports and Schedules

To create a report or schedule:

1 **Select Records.** Use QuickFilters, a User-defined Filter or a Query to select the GroupWare records that will comprise the report or schedule. See Filtering GroupWare Listings.

2 **Create a Layout.** Modify the columns in the GroupWare Listing layout to display the fields you want to be included in the report. See Changing the GroupWare Listing Layout.

3 **Sort the Records.** Choose the field to be used to sort the records. See Sorting GroupWare Listings.

4 **Print the Report.** You will be able to name the report and print it to the screen, the printer or a file. For detailed information on printing Listings, see Printing Listings. Listings printed to a file can be edited in your word processor.

Viewing, Resending, Deleting and Completing a GroupWare Item

You can view, modify, delete and complete a GroupWare Item. You modify a GroupWare Item by "resending" it. All of these functions are performed from the GroupWare Listings.

Viewing a GroupWare Item

1 Display the GroupWare Listing—either the Global GroupWare Listing or the Matter GroupWare Listing.

2 Locate and highlight the GroupWare Item you wish to view.

You can use QuickFilters, a User-defined Filter or a Query to limit the number of GroupWare Items see Filtering GroupWare Listings or use the QuickSearch Window to find the GroupWare Item, see Searching GroupWare Listings.

3 Click **Open.** A Message Send dialog will appear.

4 Click Edit. You will be able to view the GroupWare Item exactly the way it appeared when it was created.

5 Click **Close** when you are done.

Modifying (Resending) a GroupWare Item

You modify a GroupWare Item by resending it through your GroupWare application.

1 Locate and highlight the GroupWare Item you wish to view.

2 Select Open. The Message Send dialog will appear.

3 Select Edit. The original GroupWare screen will appear, containing the information you originally entered when you created the item.

4 Make whatever changes you want to make to the extent permitted by the GroupWare application.

5 Select Send when you are done.

6 Determine whether to retain the original message in addition to the modified message. You will be prompted with the message "Retract Original Item?"

- If you wish to delete the original message, select **Yes.**
- If you wish to retain the original message, select **No.**

Marking a GroupWare Item Completed

You can mark a GroupWare Item **Completed**.

1 Highlight the GroupWare Item in the Global GroupWare Listing or the Matter GroupWare Listing.

2 Select Open.

3 A Message Send dialog will appear.

4 Select **Mark completed**. The GroupWare Item will be marked completed.

Deleting a GroupWare Item

1 Display a GroupWare Listing.

2 Highlight the GroupWare Item you want to delete.

3 To delete the item:

- Hit Ctrl + D
- Hit the **Delete** key on your keyboard
- Choose **Delete** from the File Menu.

Sending and Receiving GroupWare Items

Creating a GroupWare Item

If your office uses a GroupWare product such as Microsoft Exchange or Outlook, you can execute its functions from within Practice Manager and maintain a record of the GroupWare Item in the Global GroupWare Listing and the Matter GroupWare Listing for the relevant Matter. From within Practice Manager, you can use your GroupWare messaging system to:

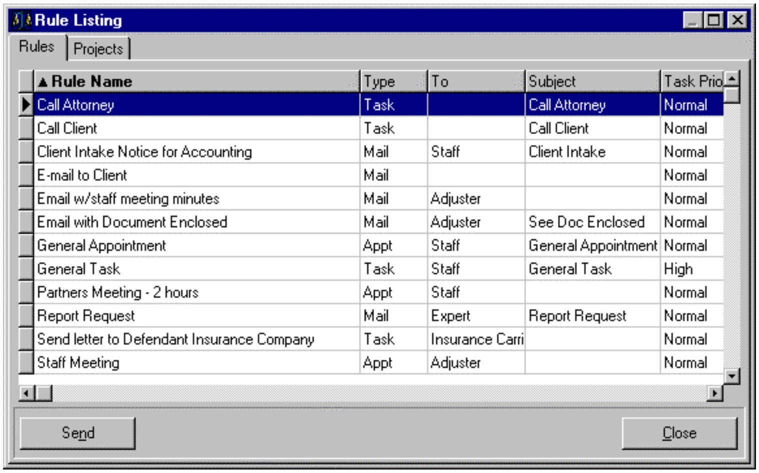
- Send an E-mail.
- Send a Note.
- Assign a Task.
- Schedule an Appointment.

You can create a new GroupWare Item from the GroupWare Listings, the GroupWare Calendar or, using a Workflow Action, from a Workflow Plan.

Schedule GroupWare Items from the GroupWare Listings

You can schedule or send a GroupWare Item from the Global GroupWare Listing or the Matter GroupWare Listing.

1. Display the Global GroupWare Listing or the Matter GroupWare Listing. See Displaying GroupWare Listings.
2. Select **New** from the Speed Bar. A list of the GroupWare Templates that were created by your Practice Manager Administrator will appear.



3 Highlight the Template you want to execute and click **Send.**

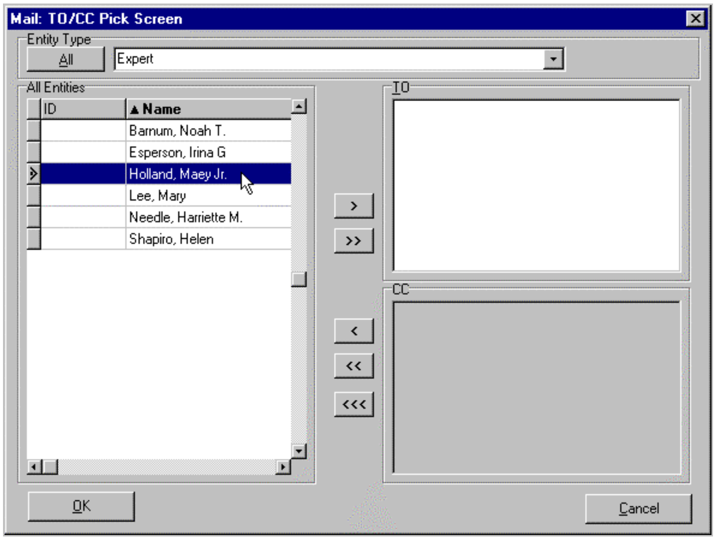
4 Make sure you choose a type of Template that corresponds to the type of GroupWare Item you want to send:

- **Mail** – E-Mail.
- **Appt** – Appointment.
- Task
- Note

If you have not already started your GroupWare program, it will start automatically.

5 Select the senders and recipients of the GroupWare message.

- If the GroupWare Template you selected was programmed to automate the selection, one or more Pick-Lists will appear.



- Using these Pick-Lists, you can choose:

  TO – recipients of the GroupWare message.

  FROM – the senders of the GroupWare message.

  CC – recipients of "carbon" copies.

  BC – recipients of blind "carbon" copies.

  For assistance using Pick-Lists, see Making Selections from a List.

- If you are not prompted to choose an Entity from a Pick-List, you will enter the E-mail addresses of the recipients of the GroupWare Item manually.

6 Complete the remaining fields on the screen presented by your GroupWare application. To complete:

- An E-Mail Message, see Sending an E-Mail Message.
- An Appointment, see Scheduling a GroupWare Appointment.
- A Task, see Assigning a GroupWare Task.
- A Telephone Message, see Taking a GroupWise Telephone Message.
- A Note, see Sending a GroupWare Note.

Schedule GroupWare Items from the GroupWare Calendar

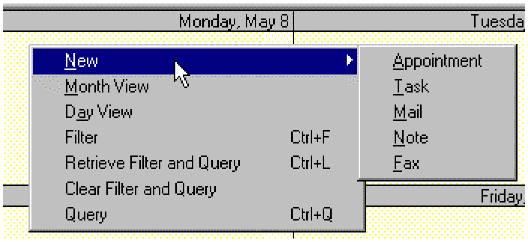
You can schedule a GroupWare Item from the Global GroupWare Calendar or the Matter GroupWare Calendar. The Global GroupWare Calendar displays in calendar format all of the GroupWare items listed on the corresponding GroupWare Listing. The Matter GroupWare Calendar displays in calendar format all of the GroupWare items listed on the corresponding GroupWare Listing for a particular Matter.

1 Display the Global GroupWare Calendar or the Matter GroupWare Calendar. See The GroupWare Calendars.

2 Select the **Calendar** on the View Menu.

3 Choose which view of the calendar you want to display (Month View, Week View or Day View) by clicking the appropriate button or the dialog displayed by clicking the Right Mouse Button.

4 After choosing the View, place the Mouse Pointer anywhere on the calendar display and click the Right Mouse Button. A menu will appear.



5 Click **New** and then choose the type of GroupWare item you wish to schedule. A list of the GroupWare Templates that were created by your Practice Manager Administrator will appear.

6 Select an appropriate Template and complete the GroupWare Item, as described above.

Sending an E-Mail Message

You can send an E-Mail Message from either the Global GroupWare Listing or the Matter GroupWare Listing.

To send an E-Mail Message:

From the Groupware Listings

1. Following the instructions in Creating a GroupWare Item,
   - Choose a Template for an E-Mail Message from the GroupWare Template Listing and click **Send.**
   - Choose the recipients for the E-Mail Message.
2. Enter the Subject of the E-Mail message.
3. Enter the text of the E-Mail message.
4. Click Send in your GroupWare program to dispatch the message.
5. You can send another E-Mail Message by repeating the steps above or clicking **Close** to return to the GroupWare Listing. The details of the E-Mail message will appear in the GroupWare Listings.

From a Document Profile, Note or Phone Call Screen

At the time you create, log or scan a document, you can create and send an E-mail directly from the Document Profile screen itself. When the Document Profile is open, click on the **Send** button. A list of Templates will pop up and you will select one, say "e-mail with attachment", for example; the attachment being the document you just created. The Templates established by your Practice Manager Administrator can include subject line and text which will appear automatically in your email. **Send** buttons are also found on the open Note and Phone Call Screens and can be utilized in the same fashion. These emails will automatically appear with text from the Note or Phone Call automatically inserted. You can add to this text whatever you wish. See Sending a Note as an E-Mail or Task.

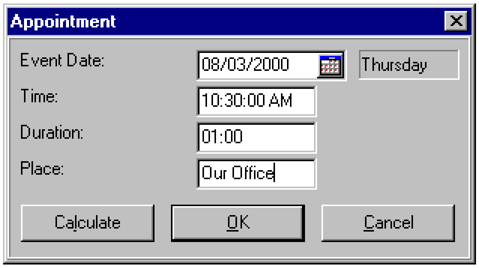
To view, resend, or delete the E-Mail Message, see Viewing Resending Deleting and Completing a GroupWare Item.

Scheduling a GroupWare Appointment

You can schedule an appointment in your GroupWare application from either the Global GroupWare Listing or the Matter GroupWare Listing.

To schedule an Appointment:

1. Following the instructions in Creating a GroupWare Item.
2. Choose a Template for an Appointment from the GroupWare Template Listing and click **Send.** Templates for an Appointment will be labeled as such under the Type column. The Appointment Dialog will appear.



3. Enter the Appointment Date, starting time, duration and location (Place) of the Appointment. Click **OK.** Your GroupWare application will open. The Template used to create the Appointment may fill out some or all of these fields.
4. Choose the recipients for the Appointment.
   - If the Template for the Appointment is set to automatically choose recipients, one or more Pick-Lists will be displayed. If not, the Appointment screen for your GroupWare application will appear.
   - In the **TO** field, insert the names of the people who will attend the appointment or are otherwise responsible for the Appointment. In the **CC** field, insert the names of people who would benefit from receiving notification of the Appointment.
5. Describe the Appointment by entering information in the Subject field.
6. Click **Send** in your GroupWare program to dispatch the message.
7. You can schedule another Appointment by repeating the steps above or clicking **Close** to return to the GroupWare Listing. The details of the Appointment will appear in the GroupWare Listings.

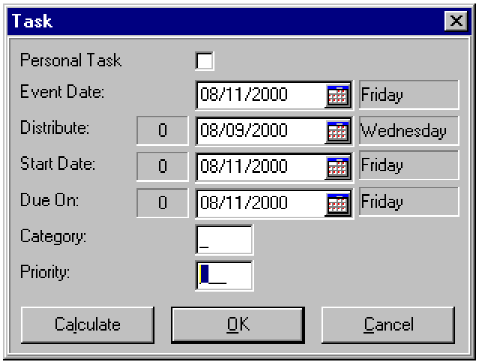
To view, resend, delete or complete an Appointment, see Viewing Resending Deleting and Completing a GroupWare Item.

Assigning a GroupWare Task

You can assign a task in your GroupWare application from either the Global GroupWare Listing or the Matter GroupWare Listing.

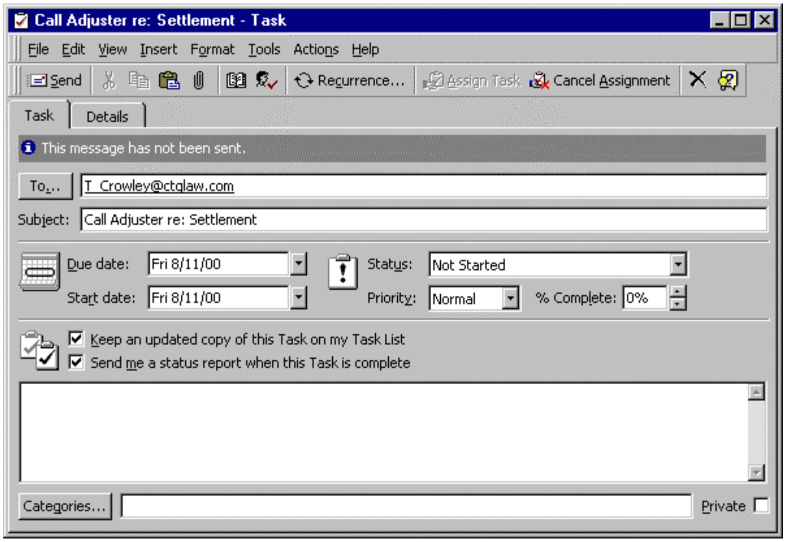
To schedule an Task:

1 Following the instructions in Creating a GroupWare Item, choose a Template for a Task from the GroupWare Template Listing and click **Send.** A Task Dialog will appear. It may be filled out with values that were established in the Template, or you can select appropriate dates.



- **Distribute Date** is the date the Task will appear in your Inbox to be accepted or declined.
- **Start Date** is the date the task will appear on the calendar in your GroupWare application.
- **Due Date** is the date the Task is due to be completed.
- **Priority** is the priority assigned to the task in your office.

2 Click **OK**. Your GroupWare application will open to a task dialog which also may be filled out with values from the template.



3 Choose the recipients for the Task.

- If the Template for the Task is set to automatically choose recipients, one or more pick-lists will be displayed. If not, the Task screen for your GroupWare application will appear.
- In the **TO** field, insert the names of the people who are responsible for the Task.
- In the **CC** field, insert the names of people who would benefit from receiving notification of the Task.

4 Describe the Task by entering information in the Subject field.

5 Select **Send** in your GroupWare program to dispatch the message.

6 You can schedule another Task by repeating the steps above or clicking **Close** to return to the GroupWare Listing. The details of the Task will appear in the GroupWare Listings.

>> To view, resend or retract the Task, see Viewing, Resending, Deleting and Completing a GroupWare Item.

Receiving GroupWare Items--Using Drag and Drop

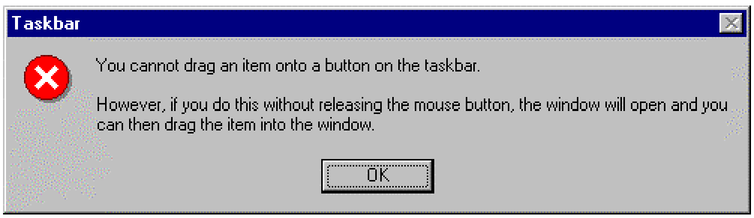
If your office uses a GroupWare program, you may receive E-mail messages and other GroupWare Items originating from sources outside of your office that did not use Practice Manager to send the items. Consequently, these items will not automatically appear on the GroupWare Listings in Practice Manager, but will be scattered around in various attorneys' inboxes. To include them in the GroupWare Listings, and better organize your information you can "drag and drop" them into Practice Manager. Using the standard Windows "drag and drop" technique, you can import a GroupWare Item directly into the Matter GroupWare Listing of an open Matter or into the Global GroupWare Listing if no Matter is currently open. Both the GroupWare Item, and any attachments, will appear in the GroupWare Listing. If the GroupWare Item includes an attachment, and you want the attachment to be included in the Document Listings, you can use "drag and drop" to import the attachment itself into Practice Manager and record it in a Document Profile. For details on using "drag and drop" to import attachments, see Importing a GroupWare Attachment.

To "drag and drop" a GroupWare Item into Practice Manager:

1. Highlight the E-mail message or other GroupWare Item in the Inbox of your GroupWare application. Press and hold down the left mouse button. Make sure that Practice Manager has been started before you use "drag and drop".

2. While holding the left mouse button, move the mouse pointer to the Windows Taskbar until it is pointing to the Practice Manager icon. As you drag the highlighted GroupWare Item to the Practice Manager icon, you will see it change to a faintly outlined envelope. When the mouse pointer reaches the Practice Manager icon, Practice Manager will open.

   Do not release the mouse button until Practice Manager has opened and you have dragged the GroupWare Item completely into Practice Manager. If you release the mouse button too early while it is positioned on the Taskbar, the following error message will appear:



Return to the GroupWare program and try again.

3 After Practice Manager opens, drag the highlighted item completely into Practice Manager and then release the left mouse button. A small "+" sign will appear next to the entry as you drag it into Practice Manager.

4 Assign the GroupWare Item to a Matter.

- If a Matter is open, the GroupWare Item will be imported automatically into Practice Manager and will appear on the Matter GroupWare Listing for the Matter.
- If no Matter is open, the Matter Listing will appear. Find the Matter in the Matter Listing and click **Select.**

When the GroupWare Item is successfully imported, the following message will appear:

Importing a GroupWare Attachment

You will sometimes receive an E-Mail—or other GroupWare Item—that includes an attachment. The attachment may be a word-processing document, a fax message, or a file created in another application. If you "drag and drop" the GroupWare Item itself into the GroupWare Listing, you will only be able to view the attachment when you open the GroupWare Item. However, if the attachment is an important document in its own right, you may want to separate the attachment from the GroupWare Item and keep track of it in the Document Listing. To do this, Practice Manager also uses "drag and drop", but rather than dragging and dropping the GroupWare Item into Practice Manager, only the attachment itself is imported in this way. When an attachment is imported using drag and drop, it is recorded in a Document Profile which is stored in the Document Listings.

To Import a GroupWare Attachment Using drag and drop:

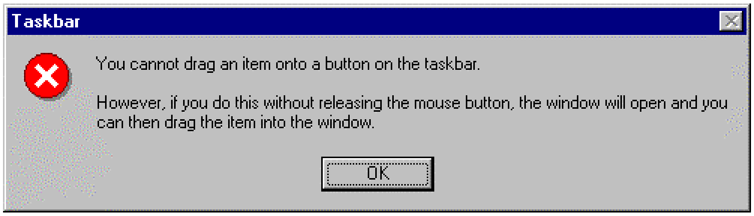
1 Locate the E-mail message or other GroupWare Item in the Inbox of your GroupWare application.

2 Open the GroupWare Item so that the attachment is displayed.

3 Highlight the GroupWare attachment by clicking on it and hold down the Mouse Button. Make sure that Practice Manager has been started before you use "drag and drop".

4 While holding the Mouse Button, move the mouse pointer to the Windows Taskbar until it is pointing to the Practice Manager icon. As you drag the highlighted GroupWare attachment to the Practice Manager icon, you will see it change to a faintly outlined envelope. When the mouse pointer reaches the Practice Manager icon, Practice Manager will open.

Do not release the Mouse Button until Practice Manager has opened and you have dragged the GroupWare attachment completely into Practice Manager. If you release the Mouse Button too early or while it is positioned on the Taskbar, the following error message will appear:



Return to the GroupWare program and try again.

5 After Practice Manager opens, drag the attachment completely into Practice Manager and then release the Mouse Button. A small "+" sign will appear next to entry as you drag it into Practice Manager.

6 Fill out a Document Profile for the attachment.

- If a Matter is already open, a Document Profile will open for the attachment with the Matter field already filled out.
- If no Matter is open, the Global Matter Listing will appear in a special window. Highlight the Matter into which the attachment will be imported and click **Select.**
- You can use QuickFilters, a User-defined Filter or a Query to limit the number of Matters displayed, see Filter the Matter Listing or use the QuickSearch Window to find the Matter, see Searching the Matter Listing.

Complete the Document Profile, following the instructions in Profiling Incoming Documents.

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Using Timeslips

Overview of Timeslips

What are Timeslips?

Practice Manager Timeslips is a full-featured time and expense capture module that enables you to keep track of the time you spend on each Matter and the expenses incurred. When you enter a Matter, Practice Manager starts a timer running. If you have activated automatic generation of timeslips in User Preferences, you will be prompted to create a time or expense slip when you exit the Matter. Or you can choose to generate a Timeslip at any time in one of several ways available in Practice Manager.

Entering Time and Expenses

When you create a Timeslip, you can use a template to automatically fill out the fields on the Timeslip screen. Even if you do not use a template, you can choose Transaction codes to automatically enter a description of the work performed or expense incurred. For litigation Matters, the Codes developed by the American Bar Association (ABA Codes) can also be entered on the Timeslip. Either your hourly rate, or the hourly rate assigned for the Client or a specific Matter, can be used to determine the value of a particular time or expense entry. When it is time to bill the Matter, all time and expense slips can be exported to a file in a format that can be read directly by your billing or accounting program.

Using Timeslip Listings

The Timeslips for all Matters can be viewed on the Global Timeslip Listing and Timeslips relating to a specific Matter are maintained in the Matter Timeslip Listing for that Matter. From the Timeslip Listings, you can create, view, edit, print and delete Timeslips. The Timeslips Listings can be sorted, searched and filtered by many different criteria, including timekeeper, Matter, type, date range and Law Type. By modifying the layout of the Timeslip Listings and using QuickFilters, User-defined Filters or Queries, you can create detailed time and expense reports, which can be viewed on the screen, printed or saved in a text file.

Using the Timeslip Listing

Types of Timeslip Listings

You can display two types of Timeslip Listings in Practice Manager:

- The **Global Timeslip Listing**, which displays time and expense charges for all Matters.
- The **Matter Timeslip Listing**, which displays time and expense charges relating to a Matter that is open.
- For instructions on displaying the Timeslip Listings, see Displaying Timeslip Listings.

Available Functions

From each of the Timeslip Listings, you can

- Create a New Timeslip.
- View, Modify, and Delete Timeslips.
- Change the Timeslip Listing Layout. Change the order, size and number of fields displayed on the Timeslip Listings.
- Sort Timeslips. Sort the Timeslip Listings by date, Timekeeper, Matter, Timeslip type, or Transaction type, in ascending or descending order.
- Search for Timeslips. Using the Quick-search Window, quickly locate the Timeslip you wish to view.
- Filter the Timeslip Listing. Using QuickFilters, User-defined Filters or Queries, limit the Timeslips displayed to particular timekeepers, type (expense or time) or date range.

- Print Timeslip Reports. Print Timeslip Reports to the screen, the printer or a text file.

Displaying Timeslip Listings

Practice Manager gives you access to two Timeslip Listings--the Global Timeslip Listing and the Matter Timeslip Listing.

Display the Global Timeslip Listing

The Global Timeslip Listing lists all Timeslips created in Practice Manager by any User in any Matter. To access and display the Global Timeslip Listing:

- From the Practice Manager Toolbar

  Click the Timeslip Listing icon  on the Practice Manager Toolbar.

- From the Practice Manager Menu

  Select **File** and then **Open** and then select **Timeslips** from the Practice Manager Menu.

- Using a Shortcut Key

  Strike F9.

Display the Matter Timeslip Listing

Whenever you open a Matter, Practice Manager includes a Timeslip Listing of all Timeslips created for that Matter. To display the Matter Timeslip Listing:

1. Select and open an existing Matter.
2. Click on the **Timeslip** tab.

Sorting Timeslips

Timeslips can be sorted by any field displayed in a Timeslip Listing, in ascending or descending order, alphabetically or numerically, depending upon the field. You will probably choose to sort Timeslips by the **Date** field. You select the Sort Field and change the sort order of the Timeslip Listing, just like other Listings. See Sorting Listings.

Select the Sort Field and Set the Sort Order

1 If the Sort Field does not appear as a column heading on the Column Heading Bar, add the desired column to the Timeslip Listing display. See Changing the Timeslip Listing Layout.

2 Double-click on the column of the field in the Column Heading Bar to choose the field and sort it in ascending order, indicated by the ▲ symbol. To change to descending order, double-click again. The sort indicator will change to ▼.

An alternate way to change the sort order*:* Point to the column to be used for sorting, display the Column Control Menu and choose "Ascending" or "Descending" from the menu.

The new sort order will remain in effect until you close the Timeslip Listing. To **Save** the selected sort options, right mouse click on the Column Heading Bar and select **Save Grid Layout** from the menu.

Searching the Timeslip Listing

You can use the QuickSearch Window, available on all Listings, to search for a Timeslip in a Timeslip Listing. To search for a Timeslip, you must set the field to be used for the search as the Sort Field. **Date** is perhaps the best field to set as the Sort Field for a search in a Timeslip Listing. For more detailed information on searching listings in general. See Searching for Records in Listings.

Using the QuickSearch Window

1 Limit the number of Timeslips displayed, if you want, using the QuickFilters, a User-defined Filter or a Query. See Filter the Timeslip Listing. For instance, you could limit the Timeslips displayed to those where you are the Timekeeper.

2 Choose the Search Field for the search, such as Date. The Search Field is the field currently used to sort the Entity Listing. See Sorting Timeslips.

  – The column heading of the currently selected Search Field will contain either a ▲ or ▼ symbol.

  – To choose a different Search Field, double-click on the column heading of the Search Field you want to use.

3 Type the first few characters of the first word or words applicable to the Search Field you are trying to match. For a date, you would type the date in the format used by your firm--for example, "mm/dd/yy".

  As you type, the QuickSearch Window will open, displaying the characters you have entered. All Timeslips whose Date begins with the characters you have entered will be displayed in the Timeslip Listing.

  If you can only remember a portion of the text you are using for the search, place the wildcard character “*” (an asterisk) before the search string. This allows you to search for Timeslips **containing** particular characters.

To clear the QuickSearch window for a new search,

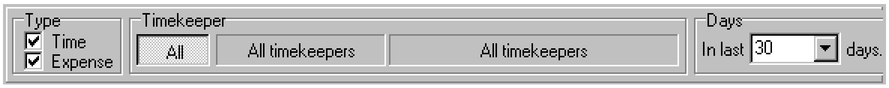
- Delete the characters in the QuickSearch Window
- Hit the Esc key on your keyboard
- Double-click on another column heading in the Timeslip Listing.

Filter the Timeslip Listing

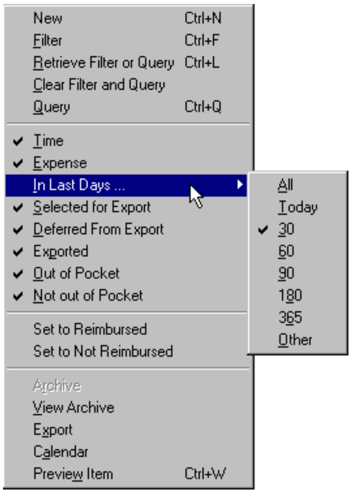
You can limit the number of Timeslips displayed in a Timeslip Listing using QuickFilters, a User-defined Filter or a Query. In User Preferences, you can set options that activate a specific Filter or Query for the Timeslip Listings or present the list of Filters and Queries each time you open a Timeslip Listing. See Setting Filter Options for Listings.

QuickFilters

You can access QuickFilters from the Filter Bar



and from the View Menu.



Select one or more of the QuickFilters from the Filter Bar or View Menu to limit the records displayed. For detailed information on QuickFilters and the use of QuickFilter controls, see Using QuickFilters and Listing Components and Controls. Selecting:

- **Time:** Displays all time slips.
- **Expense:** Displays all expense slips. (If both Expense and Time are checked, both time and expense entries will be displayed.)

- **Timekeeper Name or ID:** Displays all Timeslips for a particular Timekeeper by his name or ID.

- **In last. . . days:** Displays all Timeslips created within the stated period of days.

- **Selected for Export (View Menu only).** Those Timeslips that are ready to be exported to your Time and billing program.

- **Deferred from Export (View Menu only).** Those Timeslips that will not be exported to your time and billing program.

- **Exported (View Menu only).** Timeslips that have already been exported to your time and billing program.

- **Out Of Pocket Only (View Menu only).** Only out of pocket expense slips. These are expenses in a matter for which a User has paid out of his or her own pocket.

- **Set to Reimbursed.** Making this selection from the menu performs a function. The purpose of this feature is to indicate which out-of-pocket expenses have been paid. A User will filter for his or her out-of-pocket expenses that have not been reimbursed and can put in for expense reimbursement by printing a report. Your firm's bookkeeper perhaps will be in charge of selecting this function to set expenses to reimbursed once they are paid.

  To set expenses to reimbursed, first filter the timeslip listing for the records in question, then select **Set to Reimbursed** from the View Menu. Reimbursed status will apply only to those records that appear in the listing at the time.

- **Set to Not Reimbursed.** This will remove "reimbursed" status from any expenses. Again, you must filter for the records you wish to show as not reimbursed and then make this selection. It will apply only to the records that appear in the listing.

- **Archive.** Select this option and you will be prompted to Archive the entire list or the highlighted record. Most likely this will be handled only by your System Administrator.

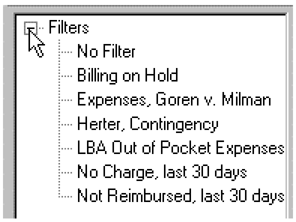
- **View Archive.** View archived Timeslip Records

User-defined Filters and Queries

You can create, save and retrieve Filters and Queries, based upon one or a combination of several fields included in a Timeslip. For detailed information on using User-Defined Filters and Queries, see Creating Filters to Select Records and Using Queries to Filter Listings. User-defined Filters and Queries include filter criteria not contained in QuickFilters, such as Client, Matter and Law Type, and can be used to create complex queries that combine multiple search criteria. For instance, you could create a Filter or Query to show all time expended in a particular practice area or on behalf of a particular Client during a specified time period. Once saved, Filters and Queries can be used to create Reports.

Retrieving a Saved Filter from the TreeView panel

In addition to other Filter options discussed above, the Matter Listing includes a convenient Filter retrieval feature in the TreeView panel on the left side of the Listing Screen.



Displayed in Windows Explorer-like format, the TreeView Filter option allows you to view saved filters at a glance and make a selection from the list. For details, see Applying Filters from the Listing TreeView panel.

Changing the Timeslip Listing Layout

The columns in Timeslip Listings simply display, in list format, information from fields in the Timeslips you have created. The number, order and size of the columns can be changed to disclose the information you want to view.

What Columns Should Be Displayed

The fields you will find most useful to display in a Timeslip Listing include:

- **Transaction Code and Transaction Description.** Ideally, your system administrator will have set up a list of Transactions and corresponding Transaction Codes (i.e. Client Conference, Case Research, Phone Call) to specify the work you are billing for. When you choose a Transaction during the process of generating a Timeslip, the Transaction Description is automatically entered as the Description of the Timeslip and can be modified or expanded. If you place the Transaction Description field on the Listing Layout, only the original, unmodified description will be displayed. Every Transaction Description has a corresponding Transaction Code. Display the Transaction Code alone if you want to save space on the Timeslip Listing. The lengthier Description field from the Timeslip cannot be viewed in the Listing, only from the Timeslip form itself.
- **Date**. The exact date the Timeslip was created.
- **HRS/QTY.** For time entries, the number of hours. For expenses, the quantity of the item.
- **Total.** The total amount charged for the time or expense slip.
- **Timekeeper Name and ID.** The name or ID for the timekeeper.
- **Rate/Price.** The hourly rate for the timekeeper or the price per unit for the expense.
- **Type.** Whether the entry is a time or expense slip.
- **Status**. The billing status of the Timeslip: Billable, No charge, Hold, Do not bill.

Adding, Removing, Ordering and Resizing Columns

You can add, remove, order and resize columns on a Timeslip Listing, just like other Listings. To make these changes to the columns listed on the Column Heading Bar, you will access the Column Control Menu or drag the columns to the proper location and size. For detailed information on how to change the layout of Listings, see Listing Components and Controls and Customizing the Listing Layout.

The Timeslip Calendars

Timeslips can also be created and displayed from the Timeslip Calendar. There are two Timeslip Calendars. The Global Timeslip Calendar displays Timeslips for all Matters. The Matter Timeslip Calendar allows you to create and display Timeslips for a particular Matter. The Timeslip Calendars are designed to be an alternative display of the Timeslip Listings. Consequently, you will access the Timeslip Calendars from the Timeslip Listings. When you display a Timeslip Calendar, you will see exactly the same Timeslips that appear in the corresponding Timeslip Listing. ***In other words, the filters you have applied in the Timeslip Listings will apply to the Timeslip Calendars.*** The Timeslip Calendars can be displayed in two different views—a week at a time and a month at a time. You can print the Timeslip calendars to the printer.

Display a Timeslip Calendar

1. Display the Global Timeslip Listing or the Matter Timeslip Listing. See Displaying Timeslip Listings.

2. Use QuickFilters, a User-defined Filter or Query to select the Timeslips you want to display. See Filter the Timeslip Listing.

3. From the View Menu, select **Calendar**.

   The Timeslip Calendar will appear, displaying the current week or month, depending upon what Default View you have chosen in Preferences. See Setting Other Preferences.

4. To change the month being viewed, use the control buttons located on the top left corner of the Timeslip Calendar:

   - Click on to display the next month or to display the previous month.
   - Click on to display the same month in the next year or to display the same month of the previous year.
   - Click the **Current Month** button to return to the current month.

5. Click **Close** to close the calendar and return to the Timeslip Listing.

Change from Monthly to Weekly View

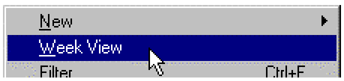
You can view Timeslips either a month at a time or a week at a time. To change from monthly to weekly view:

1 Move the Mouse pointer to a location on the Timeslip Calendar – within the week you wish to view – and click.

2 Select the **Week View** button 

. Or

Right mouse click and select **Week View** from the menu that appears.



To change to the monthly view of the Timeslip Calendar, click the **Month View** button or right mouse click on the calendar and select **Month View** from the menu.

Print the Timeslip Calendar

Once you have selected the Timeslips you want to display in the Timeslip Calendar and the view of the Calendar, you can print the Timeslip Calendar.

1 Select the view of the Calendar you want to print.

2 Select the particular week or month you want to display.

3 Click the **Print** button. The Print dialog appears.

4 Click **OK** to print or **Cancel** to cancel printing.

Viewing, Modifying and Deleting Timeslips

Once it has been created, a Timeslip can be viewed, modified or deleted. To do this, you will open a timeslip from one of the Timeslip Listings—either the Global Timeslip Listing or the Matter Timeslip Listing.

Viewing or Modifying a Timeslip

1. Open the Timeslip Listing. See Displaying Timeslip Listings.
2. Locate the Timeslip in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Timeslips displayed, see Filter the Timeslip Listing or use the QuickSearch Window to find the Timeslip, see Searching the Timeslip Listing.
3. Highlight the Timeslip and click **Open** to open the Timeslip for editing.

   Note: You can also simply Preview a timeslip, here on the listing. Right mouse click and select **Preview** from the menu. The listing display will switch to Preview mode. To preview another item, highlight it in the listing. To de-activate Preview, right mouse click and de-select by clicking on **Preview** again.
4. Make the desired changes.
5. Click **Save** to save the changes and exit the Timeslip.

Deleting a Timeslip

Timeslips are deleted from one of the Timeslip Listings.

1. Open the Timeslip Listing. See Displaying Timeslip Listings.
2. Locate the Timeslip in the Listing. You can use QuickFilters, a User-defined Filter or a Query to limit the number of Timeslips displayed, see Filter the Timeslip Listing or use the QuickSearch Window to find the Timeslip, see Searching the Timeslip Listing.
3. Highlight the Timeslip, and Hit Ctrl + D
4. Select **File** and then **Delete** from the Practice Manager Menu. A dialog asking for confirmation of the deletion will appear.

- Select **Yes** to confirm the deletion.
- Select **No** to cancel the deletion.

Printing Timeslip Reports

You can create a wide variety of useful and powerful Timeslipreports. To select the records for inclusion in a TimeslipReport, you should use **QuickFilters**, a User-defined **Filter** or a Query. When you print the records, the Timeslip Report Screen will appear. From the Timeslip Report Screen, you have control over several aspects of Timeslip reports:

- **Grouping and Sorting.** The Timeslips can be sorted and grouped by several different fields, including Date, Client, Matter or Timekeeper.
- **Display Period.** You can organize the report by day, week or month.
- **Include Subtotals.** You can show subtotals for any of the fields used to group the records in the report.
- **Report Heading and Fields Displayed.** If you filter the reports to display the records for a single Matter or Client, you can include the Client Name or the Matter Search Name in the heading for the report. You can choose to display the Matter Search Name rather than the Client Name in a report; to include the date range in the heading, if one was specified in a Filter or Query; to place all totals at the end of the report; or to use the Status field, rather than the Sub-transaction field in reports.

Filtering the Timeslip Report

Use QuickFilters, a User-defined Filter or a Query to select the time and expense slips to be displayed in a Timeslips Report. See **Filter the TimeslipListing**. Using Filters, you can specify:

- **Clients**. Timeslips for one or more Clients.
- **Matters**. Timeslips for one or more Matters.
- **Timekeepers.** Timeslips reflecting time and expense entries for one or more Timekeepers.

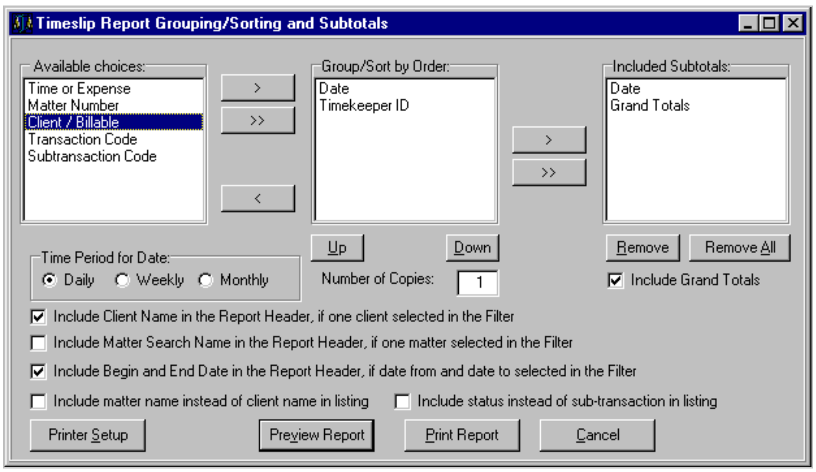
- **Date Range.** The period covered by the report—either the preceding 30, 60, 90, 180 or 365 days or a specified date range.
- **Status.** Whether the Timeslips are billable, not billable (“Do not bill”), not being charged (“No Charge”) or being withheld from billing (“Hold”).
- **Type.** Whether to include time or expense slips or both.
- **Transactions or Sub-transactions.** Whether to limit the report to specific types of Transactions or Sub-transactions.
- **Export Status.** Whether the timeslips have been exported, selected for export or deferred from export to your time and billing program.

Printing the Selected Timeslips

After filtering the Timeslips, all other aspects of the Timeslip Report will be controlled from the Timeslip Report Screen.

1 To display the Timeslip Report Screen:

- Click on the Print icon  located on the Practice Manager Toolbar
- Select **File** and then **Print** and then select **Printer** from the Practice Manager Menu. The Timeslip Report Screen appears.



2 Select the fields to be used to group and sort the records in the report. Up to six levels of sorting and grouping are possible. The records will be sorted and grouped in the order that the fields appear in the **Group/Sort by Order** window. For example, using the Timeslip Report Screen displayed above, the selected Timeslips would be sorted first by Date and then within each date they would be sorted by timekeeper.

- To designate a field as a Group/Sort field, highlight it in the **Available choices** pane and then click on the › button to the right of that pane. It will appear in the **Group/Sort by Order** pane.
- To designate all fields as Group/Sort fields, click on the » button to the right of the **Available choices** pane. All of the fields will appear in the **Group/Sort by Order** pane.
- To remove a field as a Group/Sort field, highlight it and click the ‹ button to the right of the **Available choices** pane.
- To change the order that the selected fields will be sorted, highlight the fields and move them up or down in the **Group/Sort by Order** pane using the **Up** or **Down** buttons.

3 If you chose Date as one of the Sort/Group fields, select one of the "Time Period" radio buttons. This will further organize timeslips by time periods. Your choices include:

- **Daily:** The timeslips will be grouped a day at a time.
- **Weekly:** The timeslips will be listed a week at a time.
- **Monthly:** The timeslips will be listed a month at a time.

4 Select the fields you want to use to display totals for groups of records. With the exception of Grand Totals, only those fields already included in the **Group/Sort by Order** pane can be selected to generate totals. The selected fields will appear in a list in the **Included Subtotals** pane.

- To select a field to be totaled in the report, highlight the field in the **Group/Sort by Order** pane and click on the › button to the right of that pane.
- To select all fields, click on the › button to the right of pane.
- To include the "Grand Totals" field, click the **Include totals at the end of the report** checkbox. The "Grand Totals" field will appear in the **Included Subtotals** pane. To remove it, uncheck the checkbox.

- To remove a field, highlight it and click the “Remove” button under the **Included subtotals** pane.
- To remove all fields, including the Grand Totals field, click the “Remove All” button.

5 Select miscellaneous Options:

- **Include Client Name in the Report Header, if one Client selected in the Filter:** The heading for the report will include the Client’s name, if you have filtered the Timeslips for a single Client.
- **Include Matter Search Name in the Report Header, if one Matter select in the Filter:** The heading for the report will include the Matter’s Search Name, if you have filtered the Timeslips for a single Matter.
- **Include Begin and End Date in the Report Header, if date from and date to selected in the Filter.** The time period covered by the Timeslip Report will be printed in the heading.
- **Include Matter name instead of Client name in listing.** If this option is chosen, the Timeslip Report will include the Matter Name; otherwise, it will include the Client Name.
- **Include status instead of sub-transaction in listing.** If this option is chosen, the Billing Status of the timeslips, rather than their Sub-transaction codes, if any, will be included in the Timeslip Report.

6 Print the Timeslip Report.

- If you want to Preview the report before printing it, click on the **Preview Report** button.
- The Timeslip Report appears on the Screen. From the Preview Screen, you can print the report to the printer. To print the report being previewed, or use other features available from the Preview Screens, see **Printing Listings**.
- To print the report directly to the printer, click **Print Report**.

Creating Timeslips

Creating a New Timeslip

There are a number of ways to create a Timeslip. You can create a new Timeslip from the Global Timeslip Listing or the Matter Timeslip Listing. Most conveniently, you can also generate a quick Timeslip directly from a Document Profile, Note or Phone Call screen after you have completed the task. You can also use one of three shortcuts to start a new Timeslip, or have Practice Manager prompt you to create a timeslip each time you close a matter. If you have selected **Use Timeslip Template** in Preferences, you will be given the option to use a Timeslip Template to fill in parts of the Timeslip. See **Setting Other Preferences**. Completed Timeslips can be exported to your Time and Billing program.

Create a Timeslip

From the Matter Timeslip Listing

You can create a Timeslip when you are working on a Matter.

1. Create a new Matter or open an existing Matter.

   For instructions on how to create a new Matter, see Steps Involved in Creating a New Matter, or to open an existing Matter, see Open an Existing Matter.

2. Click the **Timeslip** tab to access the Matter Timeslip Listing.

3. Click **New** on the Speedbar.

From the Global Timeslip Listing

You can create a new Timeslip at any time from the Global Timeslip Listing.

1. Open the Global Timeslip Display. See Displaying Timeslip Listings.

2. Click **New** on the Speedbar.

Using a shortcut

You can start a new Timeslip from anywhere in Practice Manager by using a shortcut. When you create a Timeslip in this way, you must manually choose the Matter from the Matter Listing on the Timeslip Screen.

- **Toolbar icon.** Click the New Timeslip icon  on the Practice Manager Toolbar.

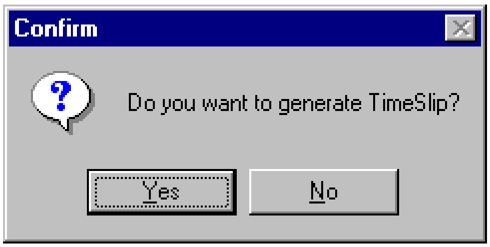
- **Menu selection.** Select **File** and then **New** and then select **Timeslip** from the Practice Manager Menu.
- **Keystroke.** Hit Shift + F9.

From a Document Profile, Note or Phone Call Screen

You can create a new Timeslip at the time you create, log or scan a document using a Document Profile. When the Document Profile is open, click on the **Timeslip** button, then create and save the Timeslip. Your Practice Manager Administrator will establish a default Timeslip to be used from the Document Profile, which may complete certain fields on the Timeslip screen automatically. Timeslip buttons are also found on the Note and Phone Call Screens and can be utilized in the same fashion to expediently generate timeslips following the completion of these tasks.

Automatically Generating a Timeslip When Closing a Matter

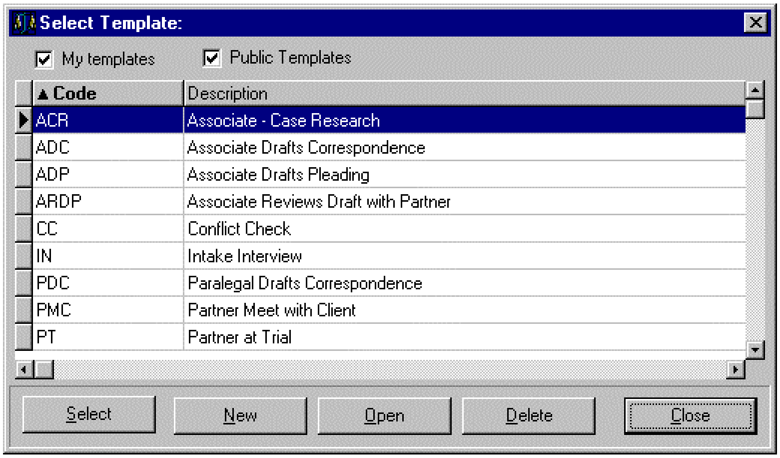
If you Activate the **Generate Timeslip in Matter** option under **Edit** and then select **Preferences**, you will be prompted to generate a Timeslip when you close the Matter by the following dialog:



- Click **Yes** to start a new Timeslip.
- Click **No** to avoid generating a Timeslip.

Using a Timeslip Template

After you start a new Timeslip, if you have elected to use Timeslip Templates, the Timeslip Template Listing will be displayed.



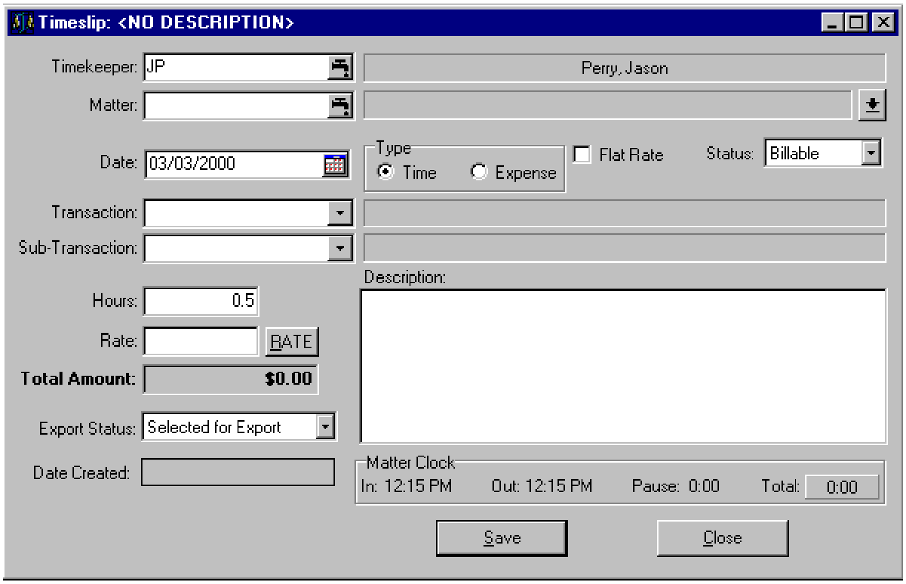
A Timeslip Template can automatically fill in certain of the fields in the Timeslip, partially or completely--Type, Timekeeper, Transaction Description and Code, Status and Hours. If you want to use a Timeslip Template, select the Timeslip Template from the list. See **Using Templates When Creating Records**.

Complete the Timeslip

Complete the Timeslip, following the instructions in **Entering Timeslip Information**.

Entering Timeslip Information

Once you have started a new Timeslip, see **Create a New Timeslip**, the Timeslip Entry Screen will be displayed. You can enter information for a time or expense slip in the fields on the screen.



For assistance in using the controls necessary to fill out the fields, see

- Making Selections from a List on making selections from lists.
- Screen and Field Controls on entering dates.

Entries Common to All Timeslips

Certain fields are common to both time and expense slips.

- **Timekeeper.** Practice Manager will automatically assume you are the Timekeeper and enter your name and ID or login. However, you can enter the name of any other Timekeeper.
- **Note:** If your firm has elected to limit the ability to enter timeslips to the person logged into your computer, you will not be able to enter time for other Personnel.

- **Matter.** If you start a Timeslip from the Matter Timeslip Listing, the Matter number and name will be entered automatically (but these entries can be altered, if necessary). Otherwise, choose a Matter name from the list.
- **Date.** Practice Manager will enter the current date. If the time entry relates to a different date, change the date.
- **Status.** This is the billing status of the Timeslip.
  - *Billable.* The time or expense slip is billable.
  - *Hold.* The time or expense slip is on "Hold" and it will be withheld from billing until its billing status has been determined.
  - *No charge.* The time or expense slip can be included in a billing, but the client will not be charged.
  - *Do not bill.* Do not include in any billing.

Entries for Time Slips

To enter your time, click the **Time** radio button.

- **Transaction.** If your firm uses Transaction Codes, choose the Transaction that most closely reflects the nature of the time entry from the list. If your firm requires Transaction Codes, you will not be able to save the Timeslip until you have chosen a code.
- Sub-Transaction. If Sub-Transactions have been implemented, select one from the drop-down list. A Sub-Transaction is a further specification of the Transaction.
- Hours. Enter the number of hours or the fraction of an hour spent on the Matter. If a Matter is open, Practice Manager will automatically track the amount of time you have spent in the Matter and enter it in the field. If you have multiple Matters open at the same time, Practice Manager will track the time for all of those Matters. The time will continue to run for each Matter, unless you suspend the running of the timer in each Matter. To do so, go to the Matter Information screen for the Matter and click the Pause button. Click the Pause button again to restart the clock. To reset the timer, you must generate a Timeslip or close the Matter.

- Rate. Practice Manager will enter your general hourly rate, unless a different hourly rate has been assigned for the Client or the particular Matter. You can override the hourly rate by entering a different rate. If you change your mind, click on the RATE button to restore the assigned hourly rate.

- Description. If you chose a Transaction, Practice Manager will enter the default description associated with the Transaction. You are free to edit the Description in any way you want. Although you cannot choose more than one Transaction for each Timeslip, you can enter multiple descriptions in the Description field. For instance, you could enter all of your time for the Matter for the day, using commas or semi-colons to separate different time entries. Note: Your changes to this field will be saved here, but they will not be seen on the Timeslip Listing View.

- Flat Rate Time Entries. You can charge a flat rate for one or more transactions instead of billing by the hour. To do so,
    - Check the Flat Rate checkbox.
    - Enter a charge for the services in the Flat Rate field.

Entries for Expense Slips

To enter an expense, click the **Expense** radio button.

This option may not be available to you, if your firm has elected not to use Expenses.

- **Transaction.** If your firm uses Transaction Codes, choose the type of expense from the Transaction list.

- Sub-Transaction. If Sub-Transactions have been implemented, select one from the drop-down list.

- Quantify. Enter the quantity of the expenses in question.

- Price. Enter the price per unit for the expense.

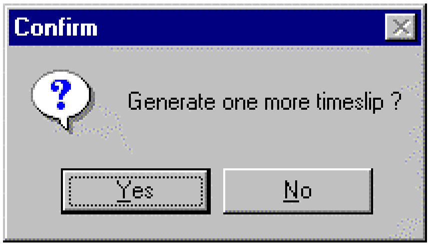
- Description. Enter a description of the charge. Practice Manager will automatically enter the default description associated with the Transaction. You are free to edit the Description in any way you want. Note: Your changes to this field will be saved here, but they will not be seen on the Timeslip Listing View. Only the default Transaction Description associated with the transaction appear there.

♦ Flat Rate Expense Entries. You can charge a flat rate for an expense in lieu of stating a quantity of items and the price per item. To do so,

- Check the Flat Rate checkbox.
- Enter a charge for the expense in the Flat Rate field.

Save the Timeslip

After you complete the fields, click **Save.** Your Timeslip will be saved and Practice Manager will ask you if you want to generate another Timeslip.



♦ Click **Yes** save the time or expense slip and start a new one.

♦ Click **No** to save the time or expense slip and close the Timeslip Entry Screen.

Export Options

Completed Timeslips can be transmitted to your Time and Billing system. The exporting of Timeslips will normally be handled by your System Administrator.

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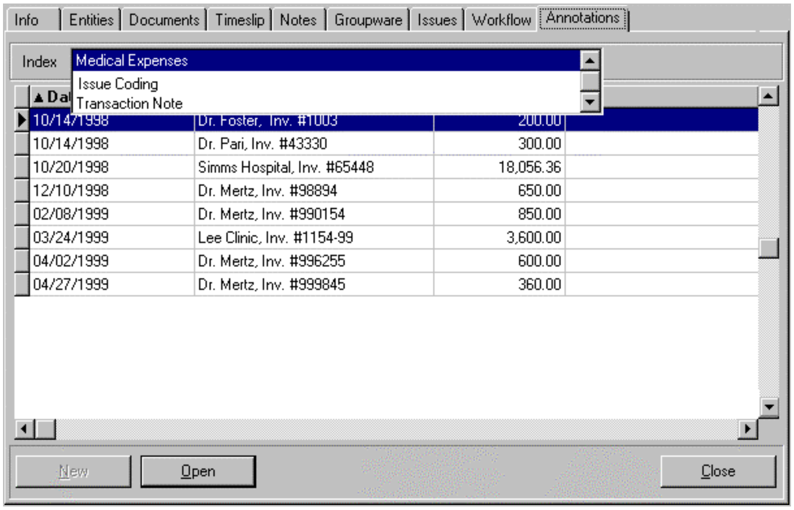
Matter Annotations

Using Matter Annotations

Using FormDesigner, your Practice Manager Administrator can create Matter Annotation forms for a Matter. A Matter can include any number of Matter Annotation forms; each one designed to record a special type of information. Like a Matter Auxiliary you can enter special information here, the nature of which, is determined by you and your administrator. However, unlike a Matter Auxiliary, each Matter Annotation form can be used to generate multiple records, much like index cards. The records in each Annotation are displayed in a listing format, just like other listings in Practice Manager. If a Matter Annotation record includes one or more number or currency fields, the entries in each field can be totaled separately for all records in the Annotation. The totals are displayed on the Annotation Listing layout. Thus, you can maintain a running total of special damages, court costs or similar information and view the totals by flipping through the Annotations in the Matter without any need to open the individual records.

To access an Annotation listing, you click on the Annotations tab within a matter and select the Annotation Index (i.e. special damages, court costs – you can keep many different annotation indexes tracking different information) from the drop-down list of Annotations. The listing of records created with that Annotation form will be displayed. You will also access Document Annotations from the Matter Annotations tab.



Create an Annotation Record

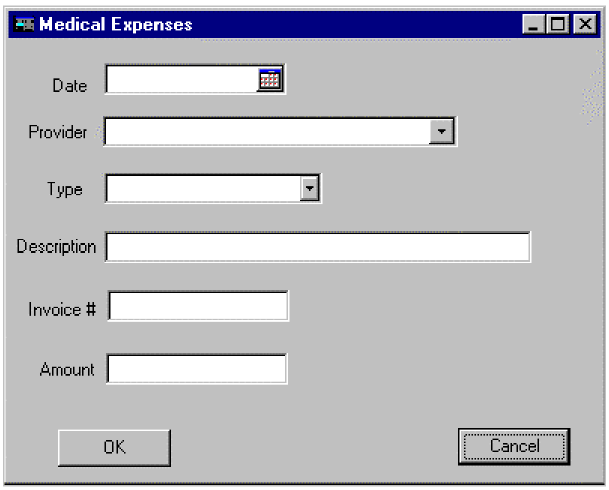
To enter a record in an Annotation form:

1 Open an existing Matter.

2 Click on the **Annotations** tab.

3 From the dropdown at the top, select the Annotation Index.

4 Click **New** to display the data-entry screen for the Annotation.



5 Enter the requested information in the fields on the data-entry screen.

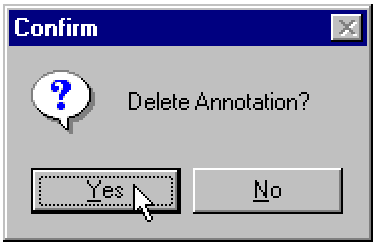
6 Click **OK** to save the record and close the screen; click **Cancel** to close the screen without saving the record.

Delete an Annotation Record

To delete a record in an Annotation:

1 Select the Annotation Index containing the record.

2 Select the record you wish to delete and select the **Delete** button. A dialog appears.



3 Select the **Yes** button to confirm the deletion.

4 Select the **No** button to cancel the deletion and retain the record.

Edit an Annotation Record

To edit an Annotation record:

1 Select the Annotation Index from the drop-down list.

2 Select the record you wish to edit and select the **Open** button to display the record-entry screen.

Make whatever changes are desired and click **OK** to save the record and close the screen or **Cancel** to close the screen without saving the changes.

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Setting User Preferences

Setting Preferences

Practice Manager allows you to customize certain of its features to your individual preferences. The features that can be customized are located on the Preferences Screen, accessed from the Edit Menu portion of the Practice Manager Main Menu. (Access to these settings is dependent upon the user's security settings.) From the Preferences Menu, you can:

Set Filter Options for Listings. Options can be set that allow you to automatically apply a Filter, choose a Filter or Query from a list or create a Filter when you open a particular Listing.

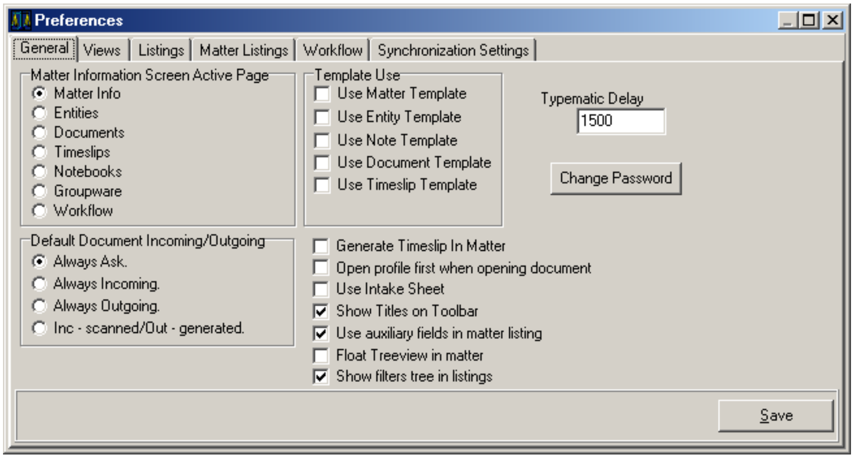
Set the Active Listing. You can select one particular Practice Manager Listing to be displayed when you first open Practice Manager or a particular Matter.

Change Password. You can change the password used to log into Practice Manager.

Set Other Preferences. You can set other Preferences, including the use of a template when creating new records in Practice Manager; which screen you will see first when creating Workflow items; whether to use Templates to create Workflow items; and whether a Timeslip will be generated automatically each time you leave a Matter.

Displaying the Preferences Menu

To display the Preferences, select **Edit** and then **Preferences** from the Practice Manager Main Menu. The Preferences Screen appears.



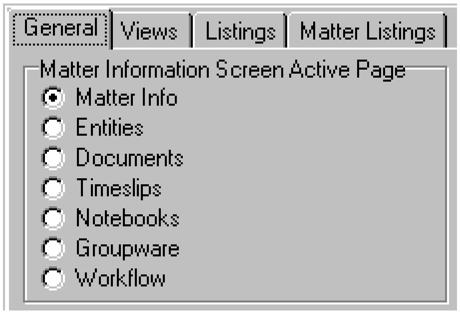
Setting General Preferences

As depicted above, the General Preferences tab is comprised of several settings that can be enabled or disabled to design Practice Manager to suit your individual preferences.

Setting an Active Listing for Matters

If you want to specify that a particular Listing will be displayed when you first open a Matter:

1. Select **Edit** and then select **Preferences** from the Practice Manager Menu. The **Preferences** dialog box appears.
2. On the **General** tab, locate the **Matter Information Screen Active Page** heading.
3. Click on the applicable radio button within this heading to choose the listing you want displayed initially when a Matter is opened.



4 Select the **Save** button to save the settings and close the Preferences Screen.

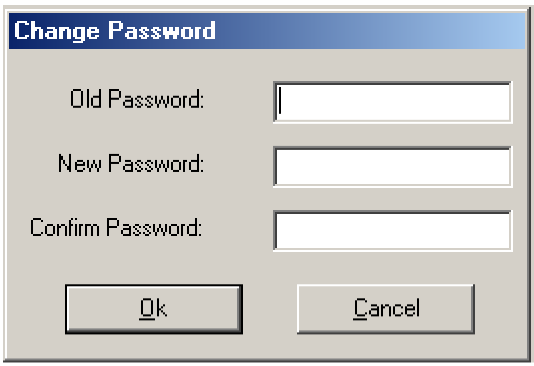
Change User Password

To modify the User Password used to log into Practice Manager: :

1 Select **Edit** and then select **Preferences** from the Practice Manager Menu. The **Preferences** dialog box appears.

2 Select the **General** tab.

3 Select the **Change Password** button to display the Change Password dialog



4 Enter the User’s old password, if any, in the Old Password field.

5 Enter the User’s new password in the New Password field.

6 Enter the new password again in the Confirm password field.

7 Select the **OK** button when done, or select the **Cancel** button to retain the old password.

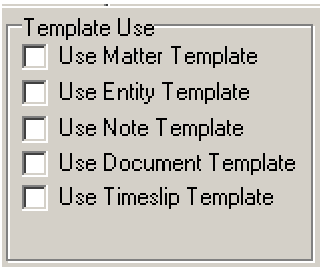
Specify Template Use

You can choose for each type of Listing whether a list of templates will be displayed each time the User creates a new record for the Listing. To do so:

8 Select **Edit** and then select **Preferences** from the Practice Manager Menu. The **Preferences** dialog box appears.

9 Select the **General** tab.

10 Under the heading **Template Use**, click the checkbox next to the Templates you wish to use.



For more information on the purpose and use of Templates, see **Using Templates When Creating Records**.

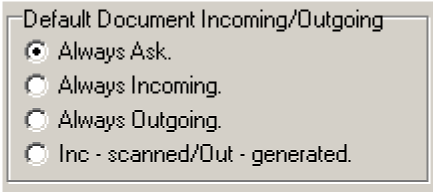
Choose Document Profile Templates.

You can specify the Template that will be used when you create a Document Profile to determine whether a document will be treated as an Incoming or Outgoing document. To understand the significance of this distinction, see **What Types of Documents Are Profiled?**

1 Select **Edit** and then select **Preferences** from the Practice Manager Menu. The **Preferences** dialog box appears.

2 Select the **General** tab.

3 Under the heading **Default Document Incoming/Outgoing**, click the setting you wish to use.

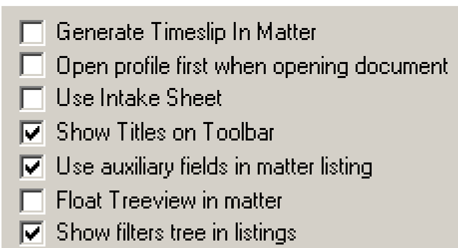


- **Always Ask:** Practice Manager will prompt you to choose whether a document will be designated Incoming or Outgoing
- **Always Incoming:** Practice Manager will automatically designate every document as Incoming**.**
- **Always Outgoing:** Practice Manager will automatically designate every document as Outgoing**.**
- **Inc - scanned Out – generated:** Practice Manager will designate all documents you create as Outgoing and all documents you scan as Incoming.

Adjust Typematic Delay

Typematic Delay adjusts how much time elapses before Practice Manager searches for records after you enter letters in a Lookup Field that uses a Filter Control. See **Making Selections from a List**. The default is 1500 milliseconds (1.5 seconds) and can be set from between 100 and 5,000 milliseconds. Normally, you will not have to change this setting.

Other Preferences



♦ **Generate Timeslip in Matter.** Checking this box will activate automatic Timeslip creation. It specifies whether Practice Manager will prompt you to generate a Timeslip every time you close a Matter. See Creating a New Timeslip.

- **Open profile first when opening document.** If you want Practice Manager to initially open the Document Profile when you open a document, check this box. When you double-click on a document in the Document Listing, the Document Profile, rather than document itself will open. This feature is useful when **Document Versions** are tracked or **Profile Only** are frequently used. You can open the document from the Document Profile by clicking on the **Open Document** button.

Note: *This setting only applies to opening a document by double-clicking the document in the Document Listing. If you click on the Open button on the Speedbar of the Document Listing, the document itself will still open.*

- **Use Intake Sheet.** Check this box if you would like to implement the use of a Wizard to assist you when entering a new matter. If your office handles a variety of cases and you will need switch back and forth between Transactional and Litigation Screen Interfaces, this option should be checked.

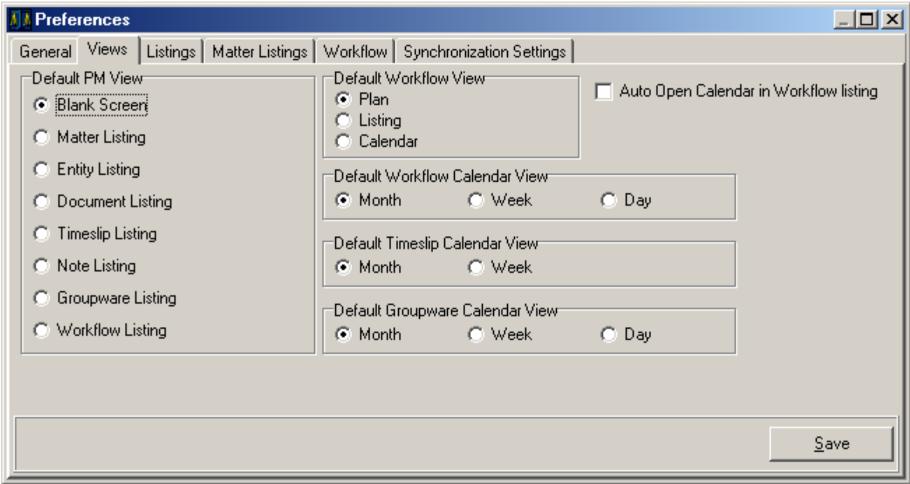
- **Show Titles on Toolbar.** Checking this box will activate the titles for the buttons on the toolbar.

- **Use Auxiliary Fields in Matter Listing.** Check this box to ensure that if your system administrator has created a user-defined matter auxiliary screen that fields from this screen will be available for display as a column on the matter listing.

- **Float Treeview in matter.**

- **Show filters tree in listings.**

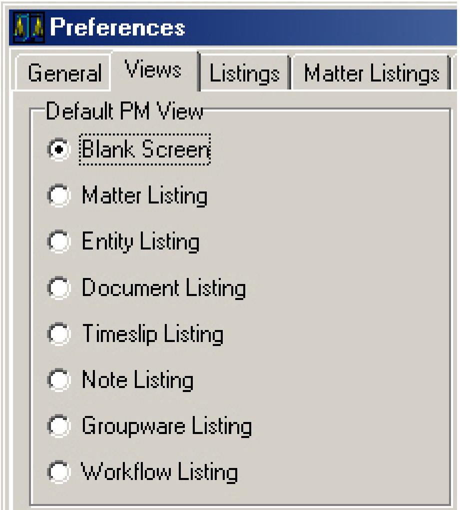
Setting Views Preferences



Default Practice Manager View

If you want to specify that a particular Listing will be displayed when you first enter Practice Manager:

1. Display the Preferences dialog by selecting **Edit** and then select **Preferences** from the Practice Manager Menu.
2. Click on the **Views** tab.
3. Choose the Listing you want to be displayed initially, after you first log into Practice Manager by selecting the applicable radio button from the list below the heading **Default Practice Manager View**.



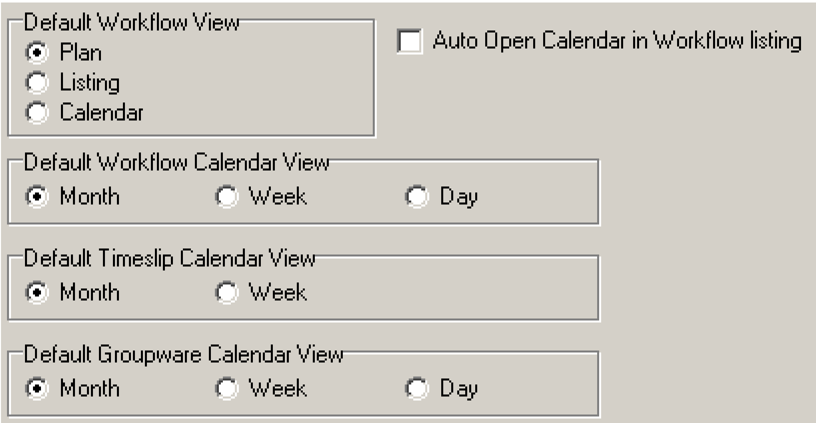
4 Select **Save** to save the settings and close the Preferences Screen.

Default Workflow Views.

You can choose which screen you will see first when creating Workflow items—the Workflow Listing, Calendar or Plan--and when viewing the Workflow, GroupWare and Timeslip Calendars—the Day, Week or Month Views. To choose the Default View:

Click the **Views** tab.

Make the appropriate selections.



Default Workflow View. Determines which screen will open when you click on a matter's Workflow tab.

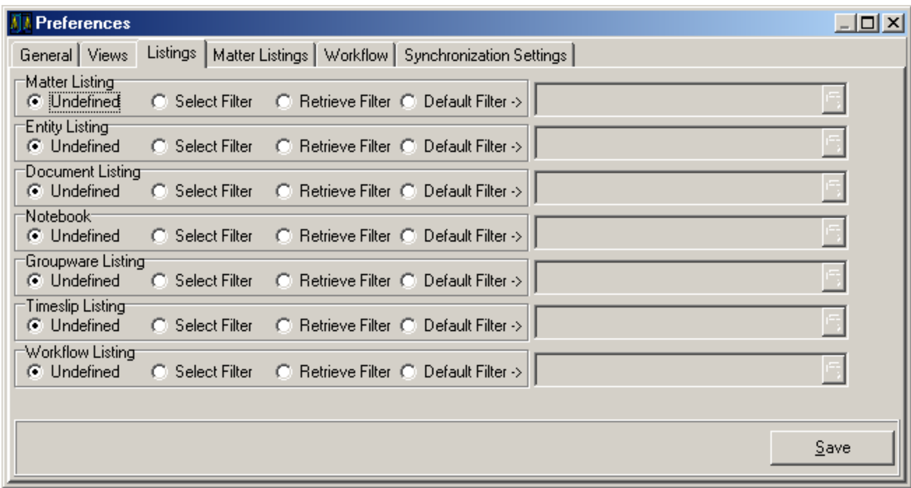
Auto Open Calendar in Workflow Listing Check this box, if you would like your Global workflow listing to always open in Calendar view. The difference between this selection and merely choosing Calendar as your default view, is that selecting this option does not affect the matter workflow screen. It will still open in listing view.

Default Workflow Calendar View. Determines which Calendar screen will open when you click on a Matters Workflow Calendar tab.

Default Timeslip Calendar View. Determines which Calendar Screen will open when you are on a Matter's Timeslip tab and select **View** and then select **Calendar** from the menu.

Default Groupware Calendar View. Determines which Calendar Screen will open when you are on a Matter's Groupware tab and select **View** and then select **Calendar** from the menu.

Setting Global and Matter Listings Preferences



By setting Preferences, each User can control what records are displayed in any of the Practice Manager Listings when they are opened—both the Global Listings (which display records for all Matters) and the Matter Listings (which display records for a specific Matter). These Preferences are set on the Preferences Screen. See **Setting Preferences**. Practice Manager uses Filters to select the records that are displayed in Listings. From the Preferences Screen, you can set Preferences individually for each type of Listing to:

Display an Undefined List. Display all of the records in the Listing by not specifying a Filter or Query.

Display the Filter Screen. Display the Filter Screen, giving the User the option to create a Filter before the Listing is displayed.

Retrieve a Filter. Display the list of Pre-defined Filters and Queries, giving the User the option to select and apply a Filter from a list of existing Filters and Queries before the Listing is displayed.

Use a Default Filter. Automatically apply a pre-defined Filter each time the Listing is displayed.

Displaying the Filter Screen—Select or Create a Filter

You can set a Preference that will automatically display the Filter Creation dialog each time a particular Listing is opened. From the Filter dialog, you can create a Filter or, optionally, select an existing Filter or Query to define what records will be displayed when the Listing is displayed. To set the Select Filter Preference:

Display the Preferences dialog by selecting **Edit** and then select **Preferences** from the Practice Manager Menu.

Choose either one of the Global Listings or one of the Matter Listings.

- To choose one of the Global Listings, click on the **Listings** tab.
- To choose one of the Matter Listings, click on the **Matter Listings** tab.

For each type of Listing, where you want the Filter Screen to appear, click on the **Select Filter** radio button.

Select **Save** to save the settings and close the Preferences Screen.

Displaying the Filter List—Retrieve Filter

You can set a Preference that will automatically display the Filter List each time a particular Listing is opened. From the Filter List, you can retrieve and apply any Filters or Queries that have been previously created and saved. ***To set this Preference, a Filter or Query must already exist***. These may be public filters or private filters. For instructions on creating Filters, see **Creating Filters to Select Records** for Queries, see **Using Queries to Filter Listings**.

Follow the steps in the previous section to display either the Global Listings screen or the Matter Listings Screen located on the Preferences Screen.

For each type of Listing, where you want the Filter List to appear, click on the **Retrieve Filter** radio button.

Select **Save** to save the settings and close the Preferences Screen.

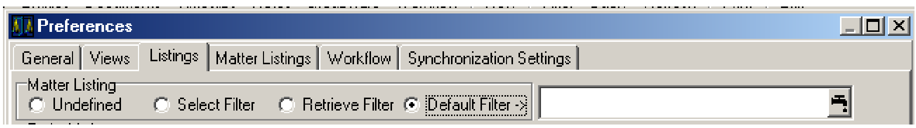
Setting a Default Filter

You can set a Preference that will automatically apply a specific “Default” Filter each time a particular Listing is opened. To set a Default Filter Preference:

Follow the steps in the section entitled “Displaying the Filter Screen—Select or Create a Filter” above to display either the Global Listings screen or the Matter Listings Screen located on the Preferences dialog.

For each type of Listing, where you want to set a Default Filter, click on the **Default Filter** radio button.

The Default Filter field will become active.



To select a Default Filter, click on the faucet icon  to display the list of existing Filters and Queries. To narrow the list, start typing the name of Filter or Query. As you type, a list of existing Filters and Queries matching the letters you have typed will appear in a list in the Default Filter field. Select a Filter from the list.

Select **Save** to save the settings and close the Preferences Screen.

NOTE: Even though you’ve selected a Default filter, you may clear the filter temporarily to view ALL records.

Displaying All Records—Undefined

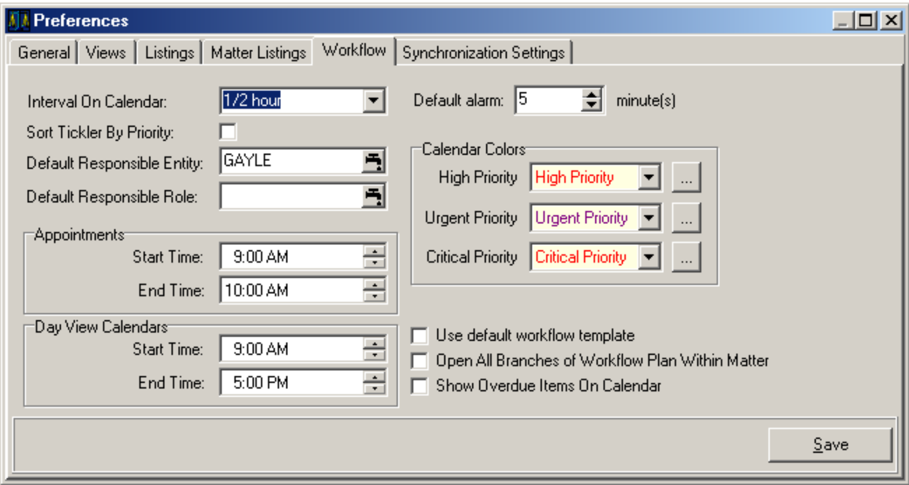
By default, Practice Manager displays all records in a Listing when it is opened and the **Undefined** option is automatically selected. However, if you have chosen a different option, you can restore the Preference to **Undefined** at any time. To set an Undefined Filter Preference:

Follow the steps in the section entitled "Displaying the Filter Screen—Select or Create a Filter" above to display either the Global Listings screen or the Matter Listings Screen located on the Preferences Screen.

For each type of Listing, where you want to display all records when the Listing appears, click on the **Undefined** radio button.

Select **Save** to save the settings and close the Preferences Screen.

Setting Workflow Preferences



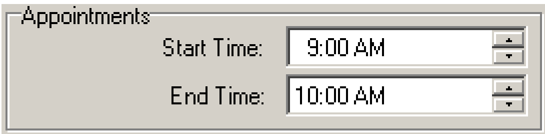
Several settings on the Workflow screen of Users Preferences affect the operation of the Workflow Calendars and Workflow Activity records.

To access the Workflow screen in User Preferences that affects Workflow Activities, select **Preferences** from the Edit Menu and then click on the Workflow tab. The Workflow Preferences screen will appear.

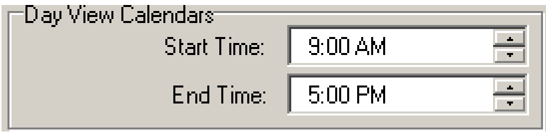
Calendar Preferences

Day View Appointment Grid Interval. By making selections from the Interval On Calendar list, you can determine the time interval that will be displayed on the Appointment grid of the Day View of the Workflow Calendars. The choices are Choose ½ hour, 1/3 hour, ¼ hour or 1 hour.

If the Workflow Activity Template used to schedule an Appointment, Court Event or Phone Call does not specify a starting and ending time, the "Appointments" preference automatically inserts a default starting and ending time. Use the spin control to change the default, or enter it manually. See Entering Dates and Time.

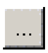


Day View Calendars Time Span. The total number of hours displayed on the Appointment grid of Day View Calendars is determined by choosing a Start Time and End Time for "Day View Calendars".



Calendar Colors for Priority Workflow Activities. Each of the three highest priorities for Workflow Activities—High, Urgent and Critical—is assigned a color. If you schedule a Workflow Activity with one of those priorities, it will be displayed in the Workflow Calendars in the associated color. In Workflow Preferences you can change the display color. To change the color:

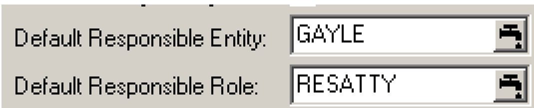
Choose one of the colors on the drop-down list

Click the  icon (and Define Custom Colors, if you want a greater selection) and choose one of the colors from the Color control.

Default Alarm Interval

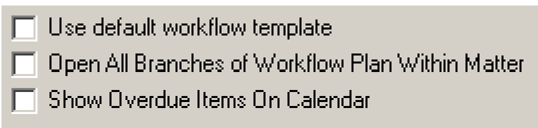
The Default alarm is the number of minutes prior to the starting time of a Workflow Activity that the Alarm screen will be displayed. To set a different interval, use the spin control to change the number or enter it in the field manually.

Default Responsible Entity and Role



When you schedule a Workflow Activity, Practice Manager will automatically assign the **Default Responsible Entity** as a personnel member who is designated as "Responsible" for the Workflow Activity and will assign the **Default Responsible Role** as that person's role in the Activity. Practice Manager uses the Responsible status as the criterion to display your Workflow Activities on the Workflow Listings and Calendars. For those staff members who usually schedule Workflow Activities for others, the Default Responsible Entity should probably be changed to the person for whom they schedule the most Workflow Activities.

Other Workflow Preferences

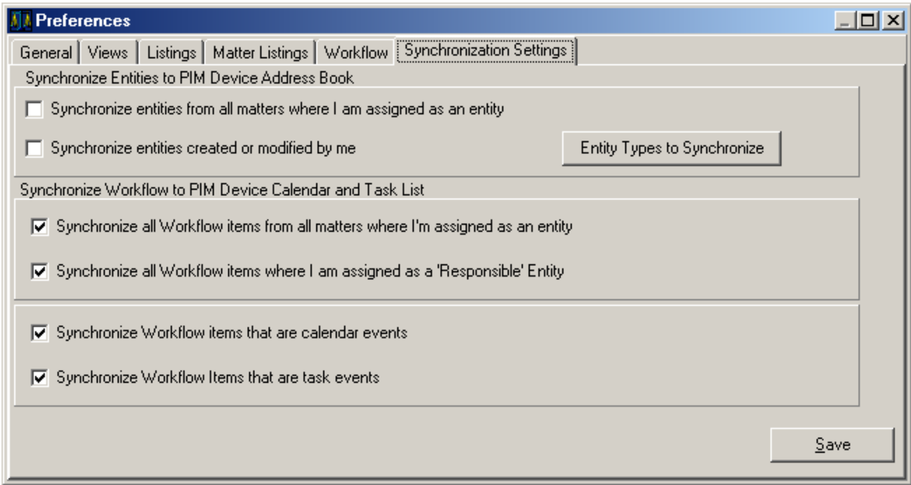


When creating a new Workflow Item, if **Use Default Workflow Template** is selected in the User Preferences, the user will be presented with a default workflow template rather than a listing of the available workflow templates.

Just as clicking on the "+" sign will expand the branches, selecting **Open All Branches of Workflow Plan Within Matter** enables the Workflow Tree to be presented in a full tree view.

To track overdue calendar items, the Show Overdue Item On Calendar selection should always be checked.

Setting Synchronization Settings Preferences



You can specify settings for use when exporting and importing information to Palm Pilot or like product. For more information about integrating with Palm Pilot, please refer to the Palm Pilot Integration document for Practice Manager 8.x.

Glossary

focus

This is a term used to described which item is current active. For example, to place focus on a field, means to basically place the cursor in that field.

Another example would be placing focus on a window. If you have two or more windows open, the window in which you are currently working is said to be “in focus.” If you switch to another window, that window is now “in focus” and the other window is no longer “in focus.”

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