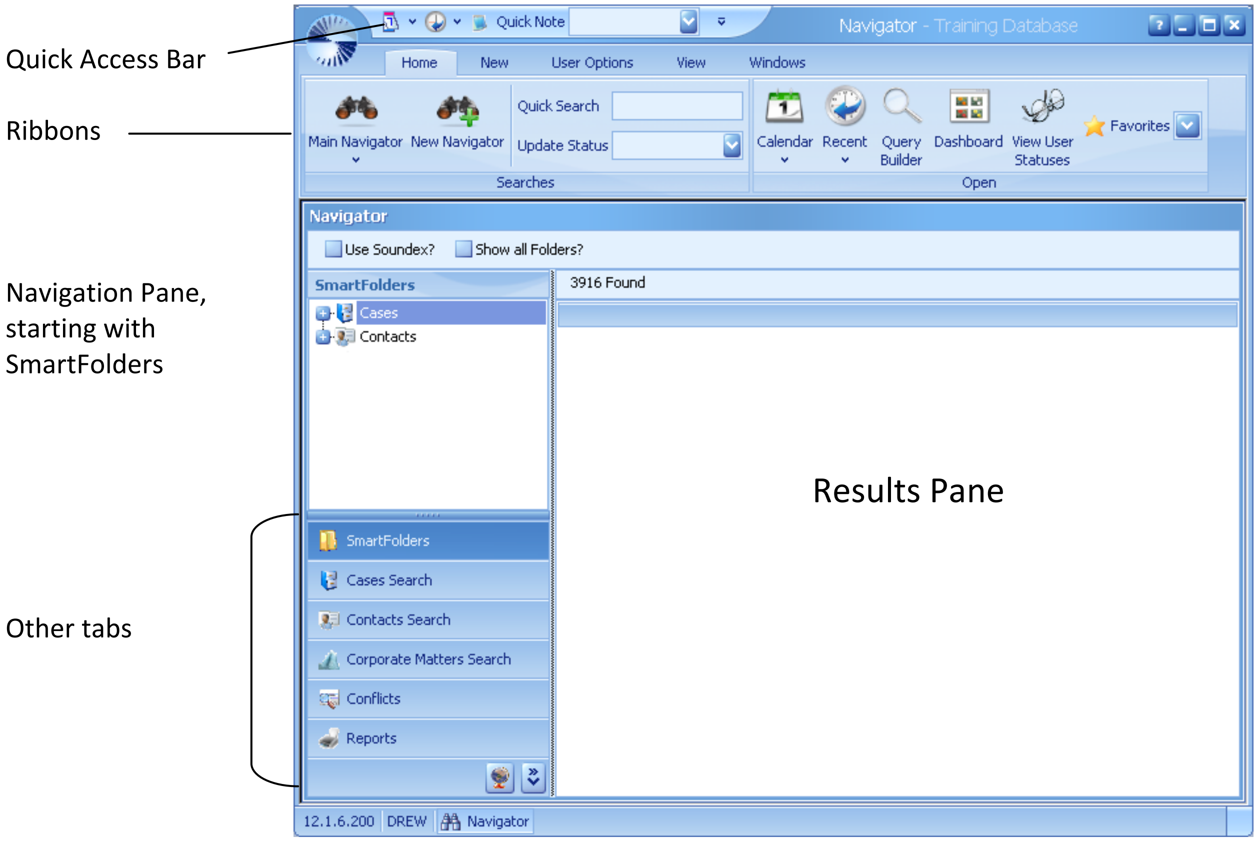
LawBase 12 End User Training For Upgrades

This course is designed for users of LawBase who are proficient with LawBase 10.7 and would like an overview of what is new.
New items are in **green**.



What do you do in Lawbase?

Find Information

- Edit
- Add
- Delete/Change
- Add email messages

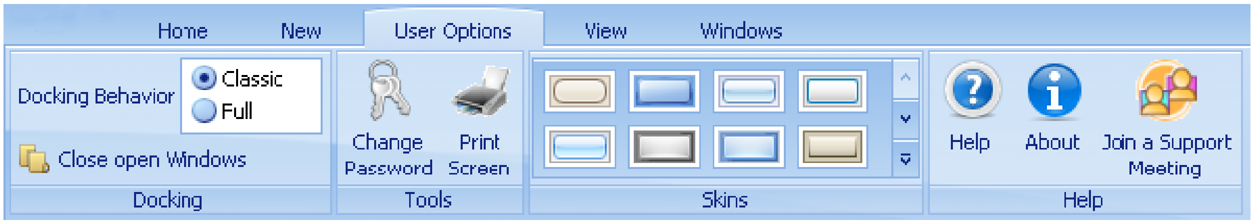
Share Information

- Case Info and case notes
- Shared Contacts
- Shared Calendars
- Email notes, calendar appts.

Produce Output

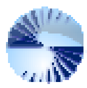
- HotDocs – word processor documents: standard forms, letters, court documents
- Reports – open cases, Mary's cases, cases that haven't been edited in the last 45 days.
- Printouts – case lists

I. User Options

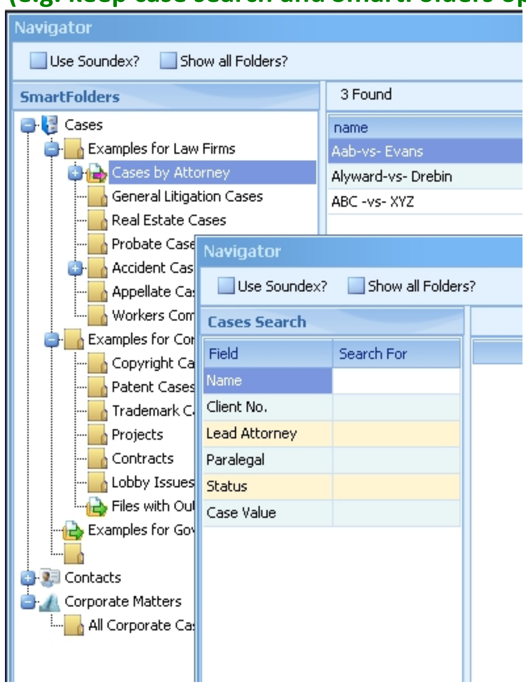


- **Docking Behavior – on the User Options ribbon**
  - **For single monitors/small monitors, we recommend classic.**
  - **Full is good for large/multiple monitors.**

- **Ribbon interface; option to minimize ribbons.**

- **LawBase button in upper left.** 

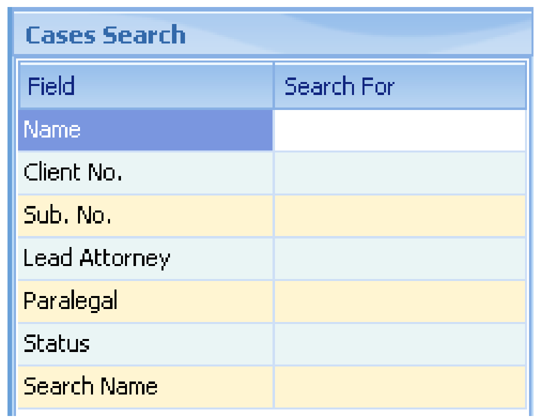
- **Online help**
- **Can have more FlexBases now (good for handling things you used to keep in separate access dbs or spreadsheet)**
- **Multiple search forms (e.g. keep case search and SmartFolders open simultaneously)**



II. Main Search Screen

a. SmartFolders – these are saved searches
   1. Cases and Contacts – click to display results.
   2. Drag and drops folder - Possible but less frequently used
      Drag specific files into a folder when there are no rules to follow

- **Each user can rearrange columns in SmartFolder display**
- **Color coded SmartFolders**



b. Cases/Contacts Search
   1. Standard Search
      Jones (wildcard is automatic)
   2. Using wildcard in a search - *acme*
   3. Search with more criteria to narrow a search

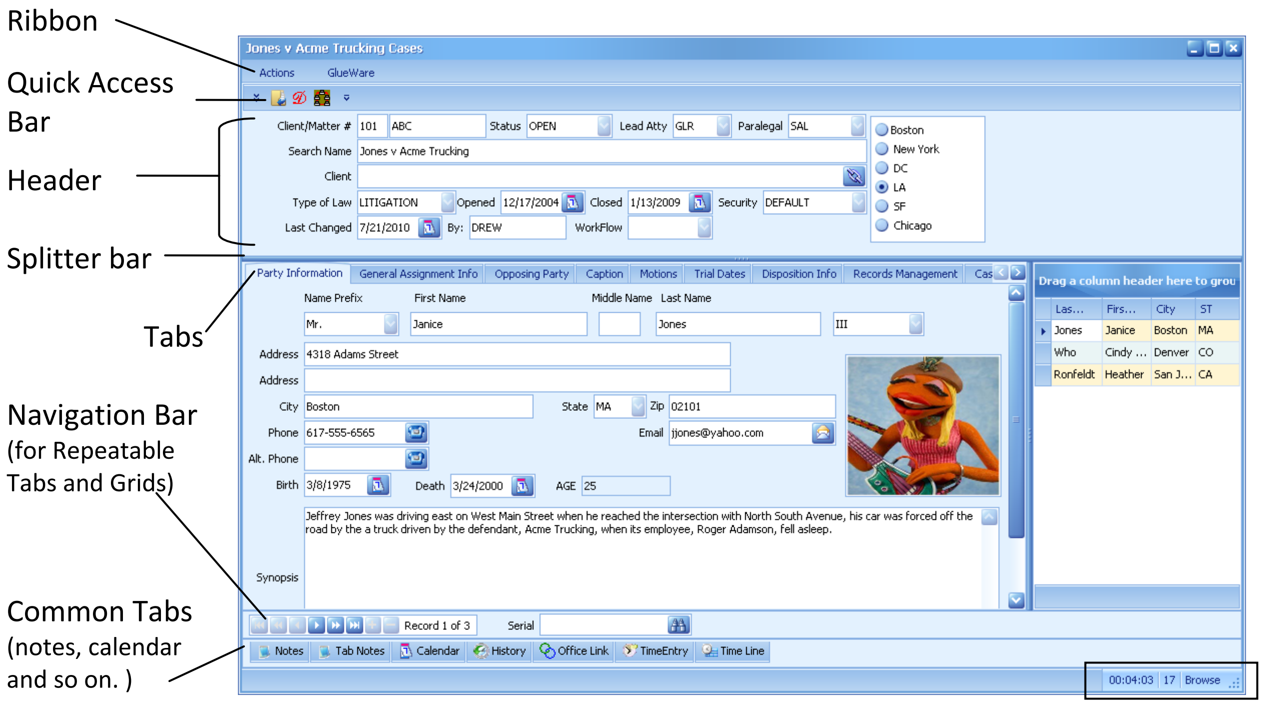
c. Conflict Search – searches across multiple fields predetermined by your admins.

d. Home Ribbon/Synaptec Button

Contains the most popular commands: Quick Search, Calendar, Recent Items, Favorites
The same commands are accessed from the S Button.

Quick Search – configured to search the most commonly searched fields.

III. Case (FlexBase) Information



a. Edit Mode vs. Browse Mode (F3)

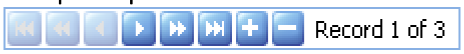
b. Header - Same for every case (in a FlexBase).
   - Two required fields - Type of law and Security

c. Move within a Tab - Press tab key to move to the next field

d. Field Types

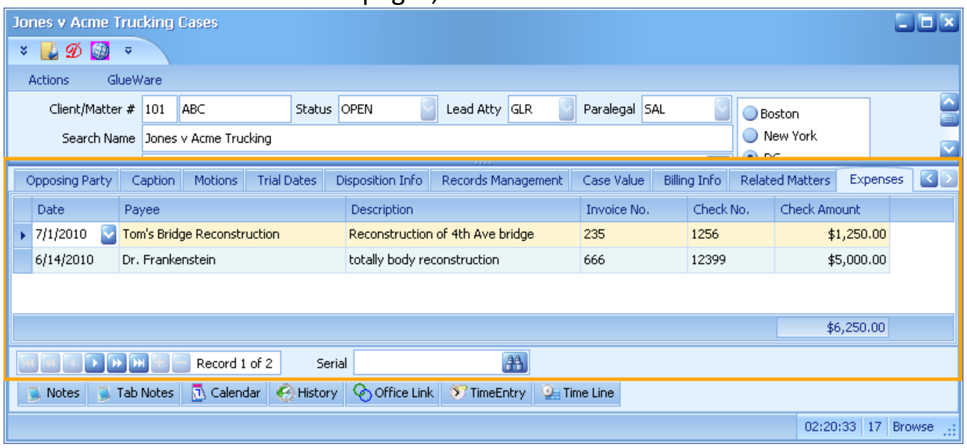
Drop-down	Also known as picklist
Date Field	Enter by typing or navigate to the date. – Double-click on date field to activate date calculator
Link Field (links to other database, often contacts)	Linking information to a link field – start to type the name of what you want to link and press enter – Viewing information – Clearing existing information
Launch Button	Opening a populated launch file Linking a file to the launch field
Email button	Fill in with an email address. Click on populated field to create new email message to the address
Radio Buttons	**Select one from a set.**
Memo Fields	Allow entry of unlimited text.
Sub Grids	**This is a table on a page. Can have multiple entries.**

e. Repeatable Tabs and Grid Screens
   See example of repeatable grid above.
   1. Multiple copies indication

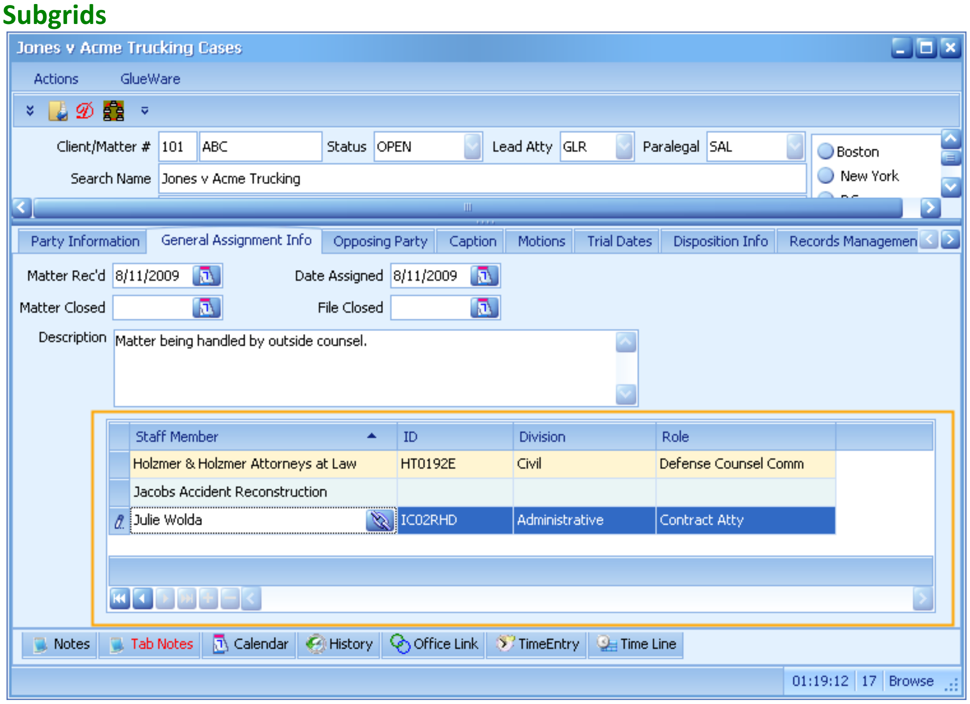


   2. Move from one copy of a tab to another using navigation bar
   3. Add a copy – click the + button.

f. Full Grids
   Same kind of data as on other pages, but in a tabular format.



g. Subgrids

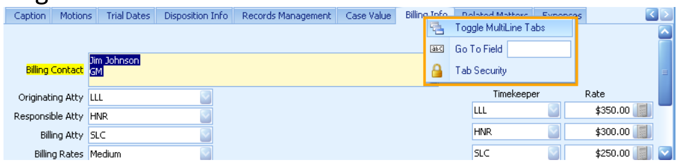


New field types

Sub grids
Radio buttons
Sub pages

h. Tab Display Options.

Single line



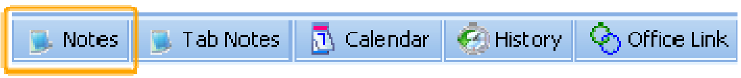
Multiline

Common tabs

- **Customizable**
- **Can have more**
- **Grid operations**

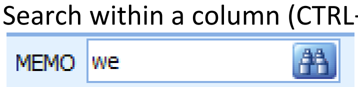
IV. Notes

a. Viewing Notes



b. Adding a Note – click the green plus from the notes view.

1. Notes Display Options
    a. Sorting on a Single Field (click on the field)
    b. Sorting on multiple Fields (shift-click on the second field)
    c. Moving columns
    d. Resizing columns
    e. Search within a column (CTRL+right-click on the column header)



c. Editing a Note

1. From the grid view
2. From the individual entry

d. Deleting a Note (if applicable)

Alternate methods to add notes

1. Adding a note from the Results Pane
2. Right-click on the All Notes bottom Tab

Use F2 as a speed key

Time stored can now show as a clock and not just as minutes

V. Tab Notes

a. Tab Note Indicator

b. Viewing Tab Notes

Can be viewed from the tab they relate to

And from Notes.

c. Adding a Tab Note

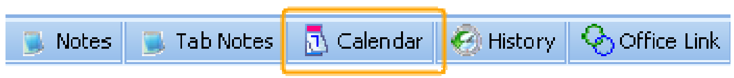
To add a tab note:

Access the regular tab you want to add a tab note to.

Right-click on Tab notes, add note.

VI. Calendar within a case

a. Viewing Calendar items inside a case.



b. Adding a Calendar Item

1. Click the + on the navigation bar
2. The Calendar Entry Box

Most fields are self-explanatory. Note: who is Responsible

a. Setting Calendar Items or Appointments to Recur

Recurrence Pattern – can use combination. Daily, Weekly, Monthly, Yearly

c. Calendar Items Display Options

1. Sorting
2. Moving , resizing columns.
3. Filters
4. Groups
5. Search within a column (CTRL + right-click on the column header)
6. Editing a Calendar Item
7. Deleting a Calendar Item
8. Completing a Calendar Item: To History, To Notes
9. Selecting, selecting multiples.

d. Alternate ways to access

1. Use F9 as a speed key
2. Add a Calendar Item from the Search Tree
3. Right-click on the Calendar Items Tab on the Bottom Tab row

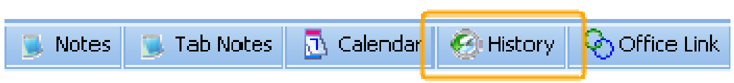
VII. Calendar

a. Viewing Calendars – Home Ribbon Button.
b. Individual Calendars vs. Group Calendars
c. Calendar Views
    1. Year, Month, Week, Day and Schedule
        - Drag and drop to reschedule
        - Go to file command
        - Complete Task from Calendar
        - Delete Task from Calendar
        - Add Note to File from Calendar
    2. Schedule View
        - view individual
        - view pre-defined group
        - view ad hoc group
d. Adding an Appointment and/or Task from the Calendar view
    1. Add link to case
    2. The rest is the same as Calendar Item entry above.

- **New graphical print – month printout**
- **All day option**
- **Private option – can label appt as private.**
- **Free time finder for groups.**

VIII. Case History

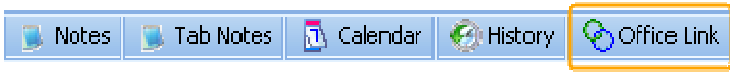
a. Viewing Case History



b. Adding a Case History Event
    1. Click the + on the navigation bar
c. Case History Display Options
    1. Sorting on a Single Field (click on the field)
    2. Sorting on multiple Fields (shift-click on the second field)
    3. Moving columns
    4. Resizing columns
    5. Search within a column (CTRL+right-click on the column header)
d. Editing a Case History Event
e. Deleting a Case History Event
f. Alternate ways to access history:
    1. Add a Case History from the Search Tree
    2. Right-click on the Case History Tab on the Bottom Tab row
    3. Use F8 as a speed key to get to case history

IX. Office Link

a. Viewing Office Link



b. Adding an Office Link item
   1. Click the Plus sign on the navigation bar
   2. Preview the Item
   3. Stretch Option
   4. Opening the linked item – double-click

c. Alternate ways to access
   1. no speed key
   2. Adding an Office Link from the Search Tree
   3. Right-click on the Office Link Tab on the bottom row of Tabs.

X. Running a Hot Docs template

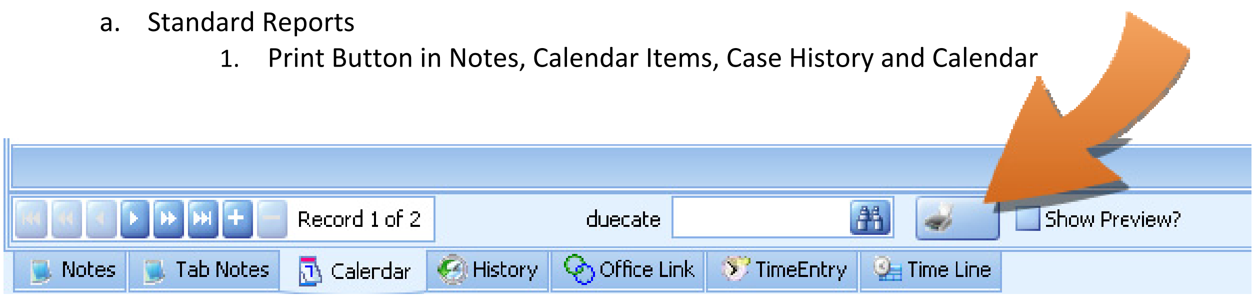
HotDocs is a document assembly program.

a. Running Hot Docs – most often from inside a case
   1. Select Form
   2. Document is assembled
   3. Print or Edit from directly within Word Processor

b. Launching Hot Docs
   1. Within a Case, from the GlueWare ribbon.
   2. Smart Folder or Drag & Drop Folder
   3. Case Folder (search results)

XI. Running Reports

a. Standard Reports
   1. Print Button in Notes, Calendar Items, Case History and Calendar



b. Pre-defined Reports
   1. Report Tab
   2. Sometimes reports from within a matter and/or contact

c. Reporting functions from the SmartFolder window

XII. Query Builder – Ad Hoc reporting

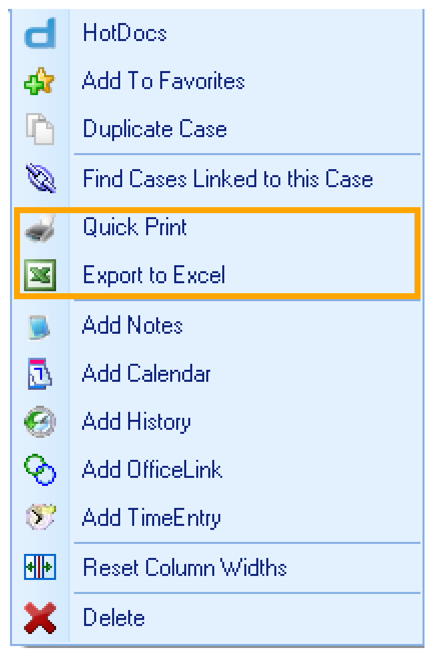
a. Creating a query –
   1. Launch the query builder
   2. Select the FlexBase
   3. Type in the search criteria
   4. Tab out of the field.
   5. Drag fields to the bottom to limit the output fields.

b. Send results to excel for printout

Results are now manipulated within the query builder

XIII. Quick Prints and other

From the results pane, right-click to access a number of other commands.



a. Result List Operations
   Quick Print and Export to Excel act on the full result list
   – Quick Print – prints a list to a non-editable format for quick printout.
   – Export to Excel – exports the results list to excel.

b. Single Case Operations
   The other commands apply to the selected item in the results pane
   – For example, among the resulting files, select the Acme file, right-click and select Add Notes. This adds a note to the Acme file.