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

| Ho | me New | User Options | View Windows | |
|--------------------|---------------------|---------------------------------|--------------|--------------------------------------|
| Docking Behavior | ● Classic ● Full | R 🥪 | | 0 🔒 🥵 |
| Glose open Windows | | Change Print Password Screen | | Help About Join a Support Meeting |
| Docki | ing | Tools | Skins | Help |

- 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.
 - 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.

| SmartFolders |
|---------------|
| 🗈 🛃 Cases |
| 😑 🐖 Contacts |
| |
| 🖨 🔚 Law Firms |
| 📴 👍 Specialty |
| |
| |
| 🔄 🔄 Courts |
| |

| Cases Search | | | | | | | | |
|---------------|------------|--|--|--|--|--|--|--|
| Field | Search For | | | | | | | |
| Name | | | | | | | | |
| Client No. | | | | | | | | |
| Sub. No. | | | | | | | | |
| Lead Attorney | | | | | | | | |
| Paralegal | | | | | | | | |
| Status | | | | | | | | |
| Search Name | | | | | | | | |

d. Home Ribbon/Synaptec Button

Home

| Main Navigator New Navigator | Quick Search | Calendar | Recent | Query | Dashboard | View User | 🚖 Favorites 🔽 |
|------------------------------|--------------|----------|--------|---------|-----------|-----------|---------------|
| × | | Ľ | * | Builder | | Statuses | |
| j Se | arches | | | | Open | | |

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

| Ribbon 🔨 | | |
|-----------------|--|---|
| | Jones v Acme Trucking Cases | |
| Ouick Access | Actions GlueWare | |
| Dor | | |
| Bar | Client/Matter # 101 ABC Status OPEN Lead Atty GLR Paralegal SAL Boston | |
| | Search Name Jones v Acme Trucking | |
| Header | Type of Law LITIGATION Opened 12/17/2004 Closed 1/13/2009 Security DEFAULT | |
| | Last Changed 7/21/2010 By: DREW WorkFlow Chicago | |
| Solitter bar | | |
| Splitter bui | Party Information General Assignment Info Opposing Party Caption Motions Trial Dates Disposition Info Records Management Cas Drag a column header here to grou | |
| | Name Pretx First Name Middle Name Last Name T | 1 |
| Tabs' | Alter Contraction for the second seco | |
| | Address All Addres | |
| Novigation Dar | City Boston State MA Zip 02101 | |
| Navigation Bar | Phone 617-555-6565 | |
| (for Repeatable | Alt. Phone | |
| Tabs and Grids) | Birth 3/8/1975 🔟 Death 3/24/2000 🔟 AGE 25 | |
| \backslash | Deffrey Jones was driving east on West Main Street when he reached the intersection with North South Avenue, his car was forced off the 🔤 | |
| \backslash | | |
| \backslash | Synopsis | |
| Common Tabs | | |
| (notes calendar | Record 1 of 3 Serial | |
| and co on V | | + |
| | UU:U+1U3 17 browse .: | 1 |

- a. Edit Mode vs. Browse Mode (F3)
- b. Header Same for every case (in a FlexBase).
 Two required fields Type of law and Security
 - Two required fields Type of faw 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 | Linking information to a link field – start to type the name of |
| (links to other | what you want to link and press enter |
| database, often | Viewing information |
| contacts) | 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

📧 💽 💽 🔛 🖼 🛨 🚍 Record 1 of 3

- 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.

| Jones v Acme Trucking Cases | | | | | | | | | | | | |
|-----------------------------------|--|----------------|--------------|----------------------------------|-------------|---------|--------------|-----------------------|--------|--------------|-------------|----------|
| × 📙 🕖 🎒 | - | | | | | | | | | | | |
| Actions GlueWare | | | | | | | | | | | | |
| Client/Matte | er # 101 | ABC | Status | OPEN 🗧 | Lead Atty | SLR 🗧 | Paralegal SA | 4L 🔄 | Bo: | ston | | |
| Search Name Jones v Acme Trucking | | | | | | | | | | | | |
| Opposing Dauku | Cashier | Makinga | Trial Datas | Dispessition Tota | Descude Man | t | Case Value | Dilling Taka | Delete | d Mathews | Expense | |
| Opposing Party | Caption | i Motions | I rial Dates | Disposition Inro | Records Man | agement | Case value | Billing Inro | Relace | d Matters | cxpense | |
| Date | Payee | | | Description | Description | | | Invoice No. Check No. | | Check Amount | | |
| 7/1/2010 | Tom's Bri | dge Reconstruc | tion | Reconstruction of 4th Ave bridge | | | 235 1256 | | | \$1,250.00 | | |
| 6/14/2010 | Dr. Frank | enstein | | totally body reconstruction | | | 666 12399 | | | \$5,000.00 | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | <i>b</i> (| 250.00 | |
| | | | | | | | | | | \$0. | 250.00 | |
| Record 1 of 2 Serial | | | | | | | | | | | | |
| 🕃 Notes 🔋 | 🔋 Notes 🔋 Tab Notes 🗟 Calendar 🧑 History 😵 Office Link 🚿 TimeEntry 💁 Time Line | | | | | | | | | | | |
| | | | | | | | | | | 02:20: | 33 17 1 | Browse 🔐 |

g. Subgrids

| Jones v Acme Trucking Cases | | | | | | | | | | | | |
|---|--------|----------|-----------------------|-------------|---------------|------------|---------------|-------------------|---------|-----------------|--|--|
| Actions GlueWare | | | | | | | | | | | | |
| × 🛃 🖉 💼 🔻 | | | | | | | | | | | | |
| Client/Matter # 101 ABC Status OPEN 🔐 Lead Atty GLR 🔮 Paralegal SAL 🔮 OBoston | | | | | | | | | | | | |
| Searc | h Name | Jones | s v Acme Trucking | | 🔵 New York | | | | | | | |
| < | | | | | | | | | | | | |
| Party Inform | ation | Gene | eral Assignment Info | Opposing | Party Captio | on Motions | Trial Dates | Disposition Info | Records | s Managemen < ≥ | | |
| Matter Rec'd | 8/11/ | 2009 | 🔝 Dat | e Assigned | 8/11/2009 [| 2 | | | | | | |
| Matter Closed | | | | File Closed | | | | | | | | |
| Description | Matte | r being | handled by outside | counsel. | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | Sec. | | | | | |
| | St | aff Mer | mber | | ID | Division | | Role | | | | |
| | Ho | lzmer 8 | Holzmer Attorneys | at Law | HT0192E | Civil | | Defense Counsel C | omm | | | |
| | Ja | cobs Ac | ccident Reconstructio | n | | | | | | | | |
| | 🥂 Ju | lie Wolc | la | Ľ | IC02RHD | Administr | ative | Contract Atty | | | | |
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| | H4 4 | | | | | | | | | <u>></u> | | |
| 📜 Notes | 遇 Ta | o Notes | ; 🗓 Calendar 🍕 | History | 📀 Office Link | 🔊 TimeEntr | y 🛛 💁 Time Li | ine | | | | |
| | | | | | | | | | 01:19: | 12 17 Browse 🔡 | | |
| 1 | _ | _ | | | | | | | | | | |

New field types Sub grids Radio buttons Sub pages

h. Tab Display Options.

Single line

| Single li | ine | | | | | | | ſ | Multiline | | | | | |
|------------------|----------------|------------------|--------------------|------------|-------------|------------------------|--------------|---|----------------------|-------------------------|----------------|-------------|-----------------|-------------|
| Caption Motion | ns Trial Dates | Disposition Info | Records Management | Case Value | Biling Info | Related Matters Evenes | ¥ 🔼 | [| Party Information | General Assignment Info | Opposing Party | Caption | Motions | Trial Dates |
| | | | | | | Loggle MultiLine Labs | | | Disposition Info | Records Management | Case Value | Biling Info | Related Matters | Expenses |
| | Jim Johnson | | | | asc | Go To Field | | | | | | | | |
| Biling Contact | GM | | | | <u>a</u> | Tab Security | = | | Jim Joh | inson | | | | |
| Originating Atty | ш | | | | | Timekeeper | Rate | | Billing Contact GM | | | \sim | | |
| Responsible Atty | HNR | 5 | | | | ա 🔛 | \$350.00 🗾 🧮 | | Originating Atty | | | | Timekeeper | Rate |
| Billing Atty | SLC | | | | | HNR 🔛 | \$300.00 | | Responsible Atty HNR | | | | ш. | \$350.00 |
| Billing Rates | Medium | | | | | SLC 🔄 | \$250.00 📳 🔽 | | Billing Atty SLC | | | | HNR 🔛 | \$300.00 |

Common tabs

- Customizable
- Can have more
- Grid operations

| IV. | Notes | | | | | | | | |
|-----|---|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
| | a. Viewing Notes | | | | | | | | |
| | 🕞 Notes 📴 Tab Notes 🗟 Calendar 🤣 History 📀 Office Link | | | | | | | | |
| | 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) | | | | | | | | |
| | MEMO we | | | | | | | | |
| | c. Editing a Note | | | | | | | | |
| | 1 From the grid view | | | | | | | | |

- 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

| | Record 1 of 2 | due | cate | # | Show Preview? |
|---------------------|-------------------|------------------|----------------------|------------------|---------------|
| 〕 Notes 📑 Tab Notes | <u> </u> Calerdar | 🚱 History 🛛 📀 Of | fice Link 🛛 🌮 TimeEn | try 🛛 🎴 Time Lin | e |

- 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.



