



**LAW
MASTER[®]**

Law Practice Technology

Forms Workbench

Upgrade.

A MASTRIN CREATION

Contents

| | |
|-----------------------------|---|
| Forms..... | 3 |
| Adding a Form..... | 3 |
| List Form Definitions | 5 |
| Forms Workbench | 5 |
| Forms Troubleshooting | 7 |

Forms

LawMaster provides the facility to output a selected range of reports as MS-WORD and HTML documents, such as matter bills, matter statements, control reports etc. These are called 'Forms'.

These are defined from Main Menu → System Maintenance → Forms → Forms Enquiry.

| Id | Brand | Description | Print / Send | Save File No | Save as Folio | Review | WIP Template | Email Address | Format Override |
|------|-------|---|--------------|--------------|-------------------------------------|-----------|--------------|---------------|-----------------|
| BB | | Bill - No details | REVIEW | | <input checked="" type="checkbox"/> | NO-PROMPT | BB | | |
| BBD | | Detailed Bill - Units/Amount with Disbursement... | REVIEW | | <input checked="" type="checkbox"/> | NO-PROMPT | BB | | |
| BET | | Detailed Bill - Units/Amount with Disbursement... | REVIEW | | <input checked="" type="checkbox"/> | NO-PROMPT | BB | | |
| BR | | Bank Reconciliation Report | REVIEW | 5 | <input checked="" type="checkbox"/> | NO-PROMPT | BR | | PDF |
| BRA | | Bank Reconciliation with Adjustments | REVIEW | 6 | <input checked="" type="checkbox"/> | NO-PROMPT | BR | | PDF |
| BUP | | Bring-up List | REVIEW | | <input type="checkbox"/> | NO-PROMPT | BUP | | |
| CA | | Cheque Continuation Advices | REVIEW | | <input type="checkbox"/> | NO-PROMPT | CA | | |
| CBK | | Bank Deposit Listing | REVIEW | 7 | <input checked="" type="checkbox"/> | NO-PROMPT | CBK | | |
| CDP | | Continuous Development Programme | REVIEW ALL | 0 | <input checked="" type="checkbox"/> | NO-PROMPT | CDP | | |
| CHQ | | Cheques | REVIEW | | <input type="checkbox"/> | NO-PROMPT | CHQ | | |
| CMR | | Controlled Monies Receipt | REVIEW | 0 | <input type="checkbox"/> | NO-PROMPT | CMR | | |
| CR | | Creditor Statements | REVIEW | | <input type="checkbox"/> | NO-PROMPT | CR | | |
| CS | | Debtor Statement | REVIEW | 0 | <input type="checkbox"/> | NO-PROMPT | CS | | |
| DF | | Data Dictionary | REVIEW | | <input type="checkbox"/> | NO-PROMPT | DF | | |
| DS | | Deed Packet Statement | REVIEW | | <input type="checkbox"/> | NO-PROMPT | DS | | |
| ED | | Entity Details | REVIEW | | <input type="checkbox"/> | NO-PROMPT | ED | | |
| ETP | | Employment Termination Payment Report | PRINT | | <input checked="" type="checkbox"/> | NO-PROMPT | ETP | | |
| FE1 | | Resource Performance (FIRM) | REVIEW | 0 | <input type="checkbox"/> | NO-PROMPT | FE1 | | |
| FE2 | | Resource Performance (OFFICE) | REVIEW | 0 | <input type="checkbox"/> | NO-PROMPT | FE2 | | |
| FE3 | | Resource Performance (ORG UNIT) | REVIEW | 0 | <input type="checkbox"/> | NO-PROMPT | FE3 | | |
| FE4 | | Resource Performance (FEE EARNER) | REVIEW | 0 | <input type="checkbox"/> | NO-PROMPT | FE4 | | |
| FOL | | Folio Output List | REVIEW | 0 | <input type="checkbox"/> | NO-PROMPT | FOL | | |
| GB | | Debtor Adjustment Advice | REVIEW | | <input type="checkbox"/> | NO-PROMPT | GB | | |
| GC | | PAYG Payment Reconciliation Statement | REVIEW | 0 | <input checked="" type="checkbox"/> | NO-PROMPT | GC | | |
| GR | | PAYG Reconciliation Report | REVIEW | | <input checked="" type="checkbox"/> | NO-PROMPT | GR | | |
| GSTA | | GST Reconciliation Report - Accrual | REVIEW | | <input type="checkbox"/> | NO-PROMPT | GSTA | | |
| GSTC | | GST Reconciliation Report - Cash | REVIEW | | <input type="checkbox"/> | NO-PROMPT | GSTC | | |
| IR | | Investment Statement | REVIEW | | <input type="checkbox"/> | NO-PROMPT | IR | | |
| LAB | | Address Labels | REVIEW | | <input type="checkbox"/> | NO-PROMPT | LAB | | |
| MA | | Matter Details | REVIEW | | <input type="checkbox"/> | NO-PROMPT | MA | | |

Figure 1: Forms Enquiry

LawMaster has predefined forms used for various reports such as Trust Statements, Fee Earner Reports, GST Reconciliations. You have the ability to create further forms for receipts, cheques, bills and matter billing guides.

Adding a Form

To add a new Form from the Context Menu → Add.

Figure 2: Add Form

| Field | Description |
|----------------------------|---|
| Form Number | Name of Form e.g. BBI – Itemised Bill. The form number can only be up to 4 characters. |
| Form File Name | Must be the path name of the saved Form. When you are adding a form, you can leave this blank as LawMaster will add this upon selecting OK. |
| Print / Send Option | <p>PRINT if the document is to be printed immediately</p> <p>SEND if the document is to be sent via email (as an attachment). Note that either an email address must be supplied from the Form generation module e.g. email address of ‘account to’ entity in the case of a bill OR the default email address defined on the ‘Email Address’ field. The first mentioned email address takes precedence over the default email address. If no email address is supplied then the document is printed.</p> <p>REVIEW if the document is to be reviewed before printing. Note: Where multiple documents are produced, the system will print\send documents silently without user intervention, unless a Save File No has been entered in the ‘Save File No’ field.</p> |

REVIEW ALL allows you to review all documents during the merge process prior to printing.

NIL no action, don't print, review or send

| | |
|---|---|
| SAVE File No | If the 'SAVE as Folio' option is selected, a subject file number may be entered in this field. When the Form is generated it will be saved to the specified subject file. Where no subject file is entered, depending on the type of form it will be save either to the Matter or the Entity. |
| SAVE as Folio | Used in conjunction with previous field, enter subject file number to which this Form will be saved. |
| Review Option | Used only when 'Print/Send Option' field is set to 'Review'. Valid values for this field are: 'PROMPT' – the user is prompted to review the document. 'NO-PROMPT' – the user is not prompted to review the document i.e. the document is immediately opened. |
| Description of Form | A description of the Form being set with this parameter e.g. Itemised Bill |
| WP Template | This must be set to specify which Form template is to be used and is of particular importance when setting up Forms which allow for multiple versions e.g. Bills. Forms BET, BED and BDT may be set up as separate bill parameters however each must have the WP Template of BB in order for bill fields to be available in the document. |
| Email Address | If SEND is chosen in the 'Print/Send Option' field an email address can be specified in this field. |
| Format Override | Set to HTML to save Form as a HTML document (as opposed to MS-Word document) |
| Information Type Document Upload | Assign the merged forms to a particular Information Type e.g. Invoices. Select the path name where your document is saved, so it can then be uploaded to the DMS. The document will take on the saved name of the Form Number e.g. BBI.docx |

List Form Definitions

This allows you to see a grid layout of the all of the available fields for a specific form. It defines the Static Fields and Table fields in more detail.

Forms Workbench

The Forms Workbench tool is accessed from the Main Menu → System Maintenance → Forms → Forms Workbench.

This tool allows you to build your forms based on the relevant fields available. Please note that if you are creating a receipt you can only use the fields available to you under the REC form. If you are creating a bill or matter billing guide you use those fields available to under the BB form.

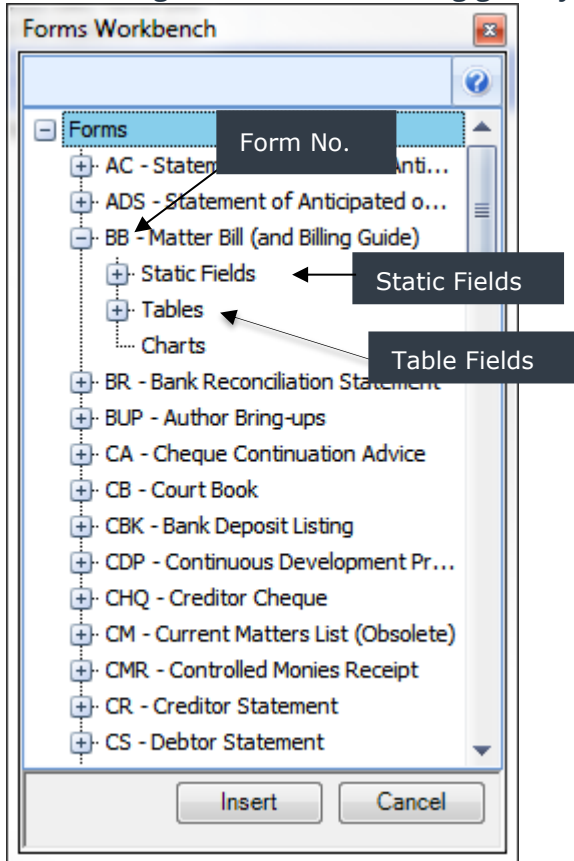


Figure 3 – Forms Workbench

Within Forms, there are two types of fields available to you, Static Fields and Table Fields. When creating your document you need to ensure you follow these rules:

- ❖ Static Fields can be used anywhere in your Word document. You can include them in Word tables but they cannot be in the same Word table as ‘Table’ fields.
- ❖ Table Fields can only be used within a Word table. The Word table may have a maximum of two rows and only one type of Table field may be used within each table e.g. if a user is entering Table 1 fields into the Word table, they cannot then add a field from the Table 2 list into the same Word table. The Table 2 fields must be entered into a separate Word table.

Forms Troubleshooting

Should your final document not merge, or merge incorrectly LawMaster will provide an error message outlining the problem with merge that can include:

- ❖ WP Form xxx.docx not found

The Form either does not exist, or is incorrectly named in the folder structure, or the Forms parameter for that Form is pointing to the incorrect location.

- ❖ WP Parameter for xxx not found

The Forms parameter for the Form being merged is either incorrectly named or does not exist.

- ❖ No documents to print

There is no available data to input into the merged Form (e.g. if merging a transaction statement (WS.docx), and there is no WIP on a particular matter, then this message will be displayed as there is nothing to merge into the Form).

- ❖ Tables with more than two rows are not supported.

The Form has more than two rows in a Word table (see rules above).

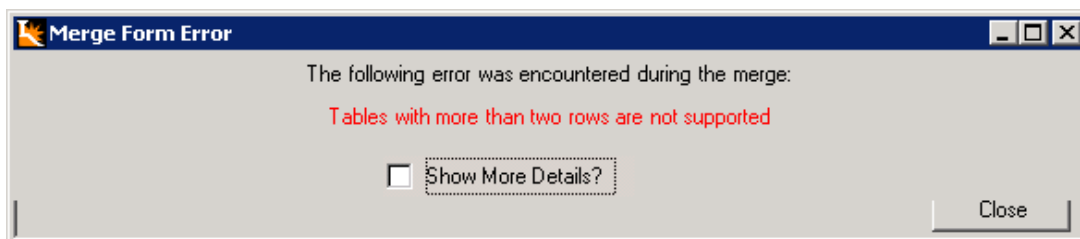


Figure 4 – Merge Form Error

This error screen also supplies a grid view of the data (aligned against its corresponding field (static/table)) that would have been merged had the merge process not failed. To show this information click in the field 'Show More Details?' (see Figure 5). However, if the message was 'No documents to print', there would be no data in the grid.

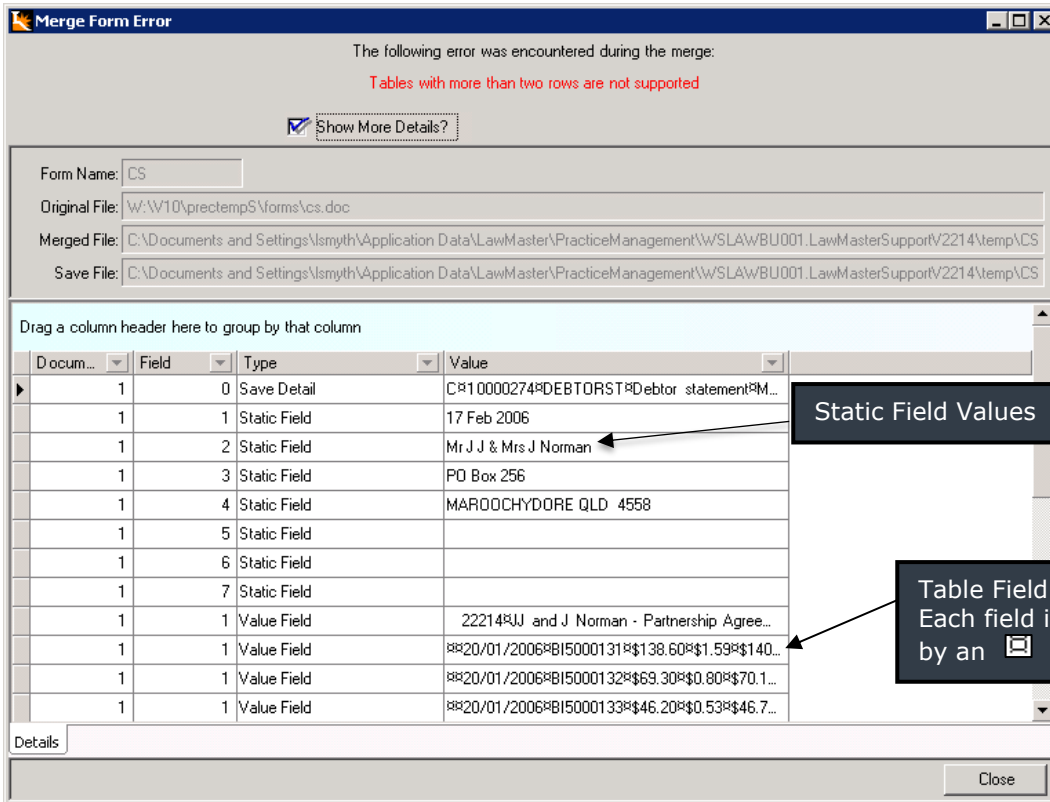


Figure 5 – Merge Form Error – Show More Details