LAW MASTER®
Law Practice Technology

System Administration

Upgrade.

A MASTRIN CREATION

Contents

Parameters and Basic System Administration

This document sets out the basic parameters which you will need to review and modify as part of the LawMaster implementation.

Screen shots are provided to assist you with information required to be completed for each parameter.

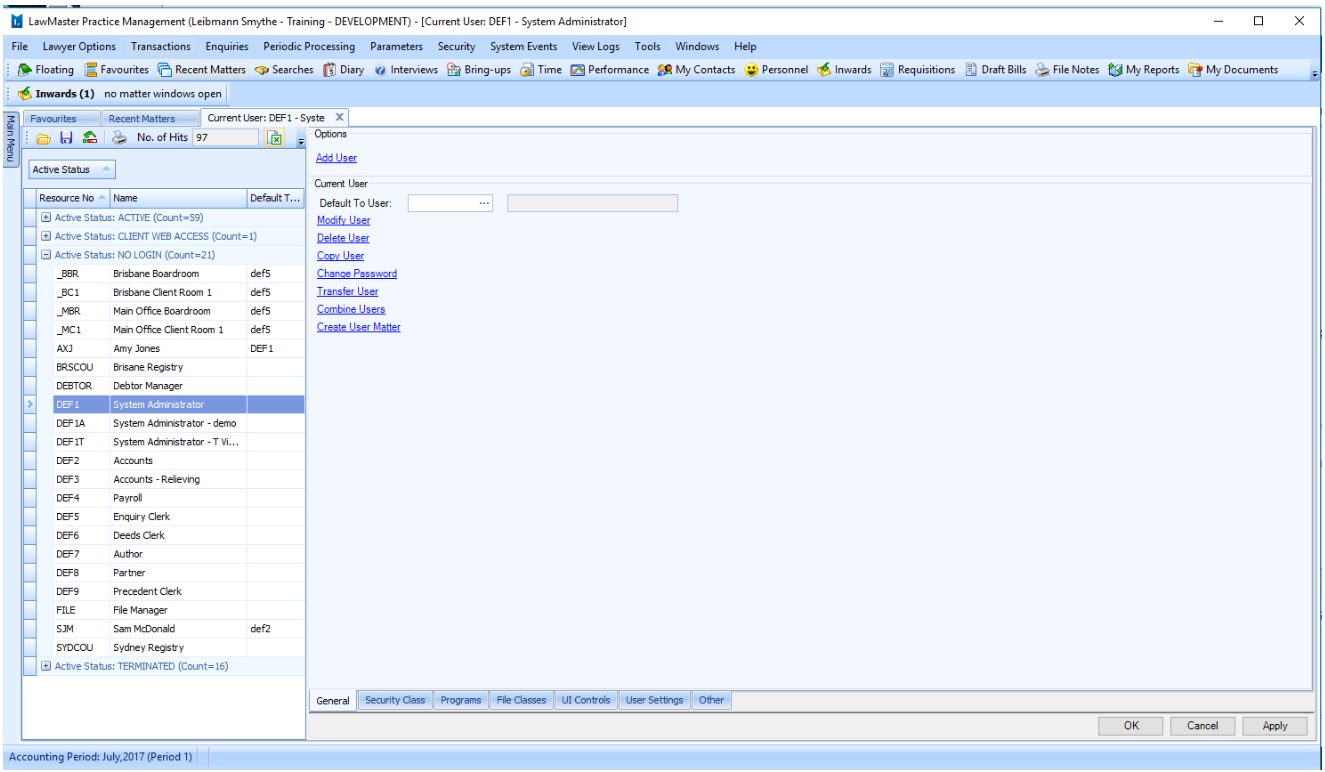
This document is not a complete listing of all parameters. Caution should be taken when removing or deleting any parameters. Always test changes in your Training database prior to making any changes in your Production database.

Security

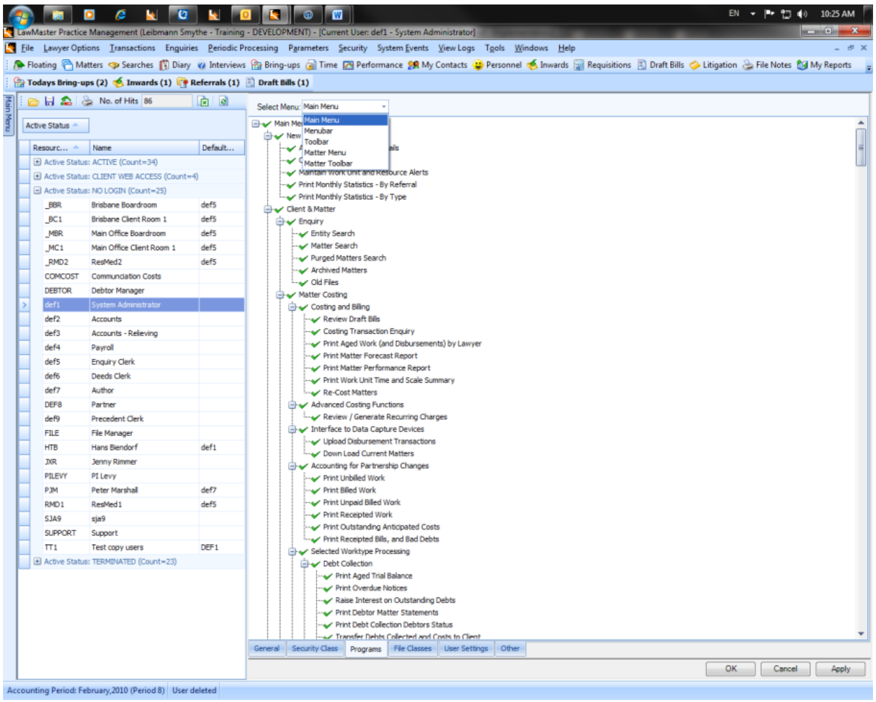
Default Users

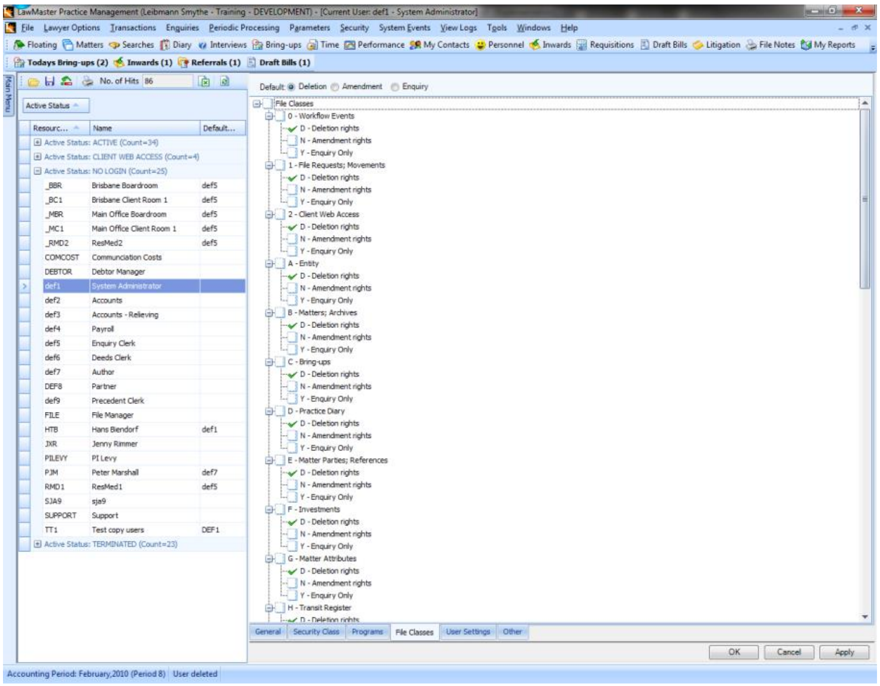
A Default User allows you to set up security "templates" based on work positions. These default users, can then be allocated to each Resource (user). Each Default User will control which areas of LawMaster users will have access to. This is accessed from Menubar → Security → Maintain Users.

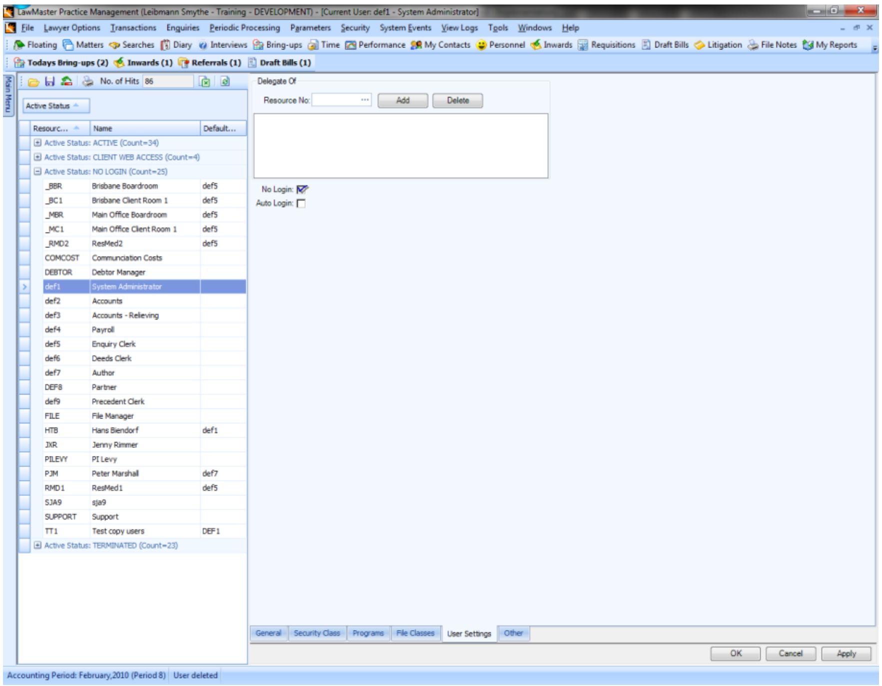
Default Users are located in the "No Login" section on the left hand side.



There are a series of tabs at the bottom of the screen on the right hand side. Information in these tabs allows you to select specific Security Classes, Menu options, Toolbar Options and File Classes. These all control what each user is able to see and do within LawMaster.







You will need to review each of the Default Users and the relevant tabs associated with each. Tick or Untick specific items which you do not want users to have access to.

Show Licensed Counts

Prior to adding a user to the system, you should check to see if you have enough licenses. This is done from Security ➔ Show Licensed Counts. The data is returned in a grid, allowing you to see the number of users added in the system against the number of licenses you have including iBench, Bring-up Web Bench and Client Web Access licenses.

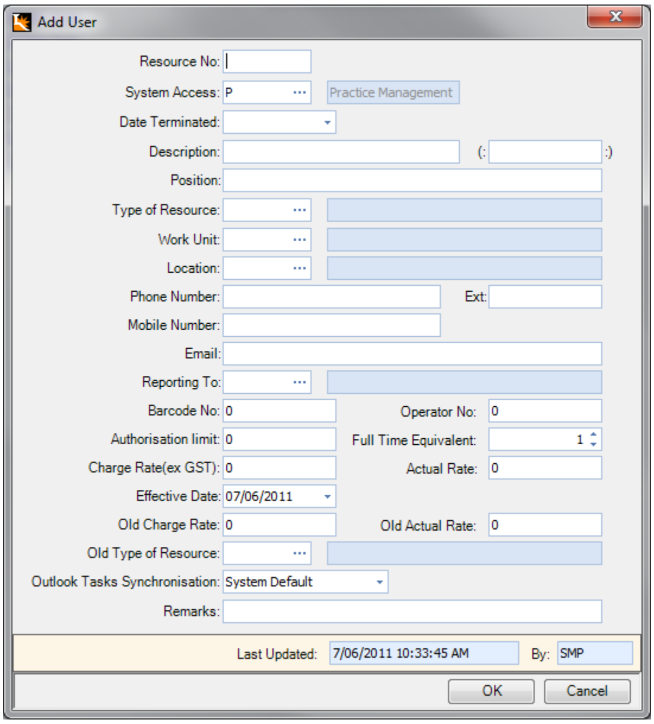
Drag a column header here to group by that column

User Count	License Count	Variation	iBench User Count	iBench License C...	iBench Variation	Bring-up Web Be...	Bring-up Web Be...	Bring-up Web Be...	Client Web Acce...	Client Web Acce...	Client Web Acce...
55	60	-5	16	20	-4	10	20	-10	1	20	-19

Adding a Resource / User

Within the 'Active' section in the menu on the left hand side of the screen, you will see 'PROADM – Progress Administrator' as a user. ***Do Not Delete this User***. LawMaster uses the 'Proadm' user whenever we are required to access your database for support purposes, upgrades or testing. The 'Proadm' user does not impact on your licence count, even though it is within the Active users list.

Select ➔ Add User on the right hand side of the screen



❖ Details which may be entered for users include:-

❖ Resource No. This is the identifier for the user and is normally the user's initials e.g. GCM.

- System Access. Select the appropriate systems that this user will be able to access, which includes Practice Management, Client Web Access and iBench.

- Date Resource Terminated. When a resource leaves the firm their termination date is recorded in this field. This date must be set (and the 'No Login' box ticked on the User Settings tab) in order for the resource to be removed from the licence count of the firm.

- Resource Description. Name of user e.g. Gregory McInnes.

- Short Description. This field may be searched on e.g. Greg.

- Position. This is the resource's job title e.g. Solicitor. Limit of 60 characters.

- Type of Resource. A resource type as defined by the RE- Resource Type parameters must be selected.

- E.g. S – Solicitor. The special resource types 'Z' and 'X' are used to prevent resources from being included on the various resource performance reports. Unlike resource type 'Z', resource type 'X' allows such users to access the Lawyer's Workbench. The "resource type" parameter also holds the default activity rate and charge out rate for that type of resource and is brought into corresponding resource fields when a resource is first added to the system. Refer to Resource Management for further information.

- Work Unit. This is the work unit or office (department) of the resource. A selection must be made from the OC – Work Units Non Accounting parameters. This is also termed 'organisation unit' e.g. C – Commercial.

- LawMaster supports the concept of an office code being a branch, a department and a cell, each item being identified by a single character. Various resource reports are produced by office code. (The term work unit is also used to refer to Office Code).

- With respect to matters, the user may define the level of coding for the office code by ticking the Header box in Work Unit-Non Accounting parameters. When an office code is a 'Header' this will prevent it from being assigned to a matter.

- Location. A selection is made from the codes defined in the OL – Office Locations parameter e.g. M-Main Office

- Phone number. Ext. This is the phone number and extension of the resource or operator.

- Email. Enter the email address of the resource.

- Reporting To. Specify to which user (must also be a resource in LawMaster) this resource will report to e.g. managing partner or department head.

- Barcode No. If barcode systems are being used within the firm, a barcode number may be assigned to the resource.

- Operator Number. This number is used for scanning documents via the Mailroom Processing module. See Mail Room Processing for further information.

- Authorisation Limit (used in Practice Management System). If the user has a ‘default to user’ for security purposes and the limit for the actual user is zero, then the ‘default to user’ limit will be used instead.

- Full Time Equivalent (FTE). The use of this field will enable budgets for non-fulltime resources to be calculated in relation to units available per day i.e. FTE * Units per Day. The default value = 1 where 1 is a Full Time Resource.

- Charge Rate (exclusive of GST) – per unit

- Actual Rate. A notional rate which represents the actual cost of employing the resource e.g. pay rate per unit

- Effective Date. Used to determine when Resource Type, Charge Rate, and Actual Rate commence.

- Old Charge Rate.

- Old Actual Rate.

- Old Type of Resource.

- Outlook Tasks Synchronisation. Allows the Outlook Tasks to be synchronised either as per system default, enabled, or disabled on a per user basis.

- Remarks

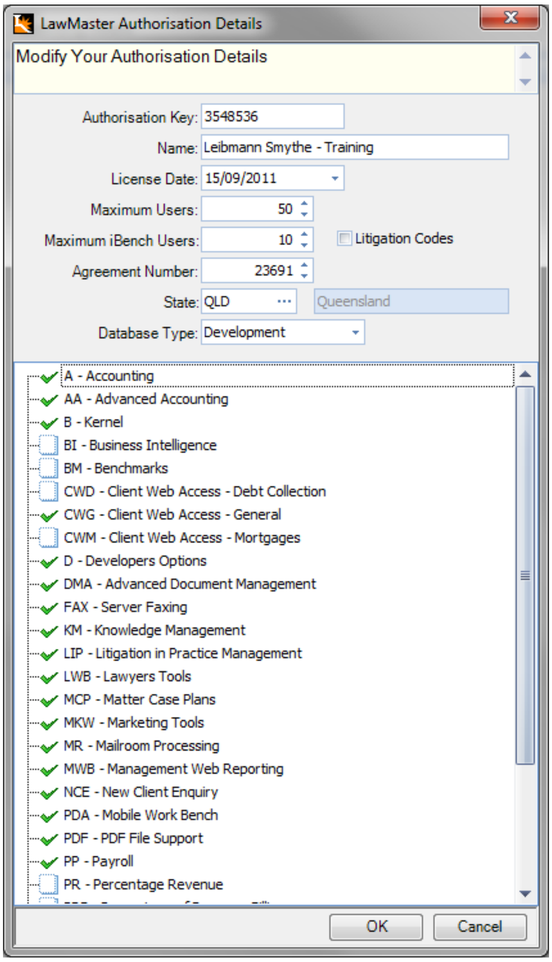
- Once a user has been added, security details may then be applied.

Parameters

All parameters are located from Menu bar ➔ Parameters ➔ Set Parameters

Licensing

Before LawMaster can be used, product registration details must be entered. Initially, these are entered by LawMaster. Upon the anniversary of each license period, new details must be entered. The authorisation code calculation is based on the license date, the license number, number of users, and the individual products that may be used.



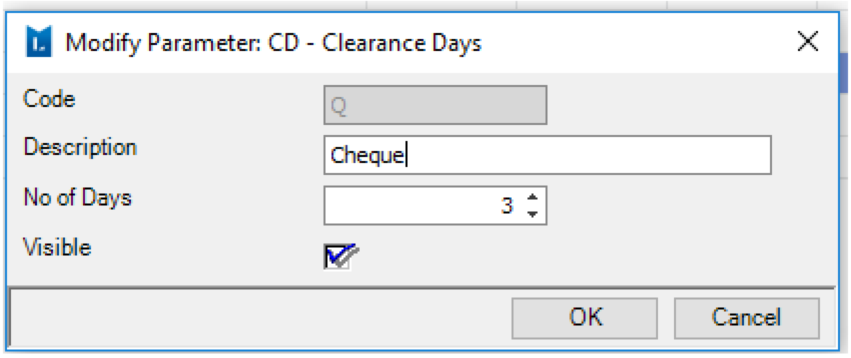
Accounting

We have selected some of the accounting parameters to include within this document as a large number of accounting parameters have highly integrated functionality which means changing them incorrectly can have serious implications for your system.

The parameters included here can safely be modified in accordance with instructions without jeopardising the financial integrity of the system.

Clearance Days

Allows you to set the number of clearance days when entering receipts based on the Media type selected. This will add the number of days to the receipt date to give you the Clearance Date.



Credit Cards Accepted

This parameter allows the firm to define, for each credit card type, the surcharge payable by the debtor if that particular credit card is used. Fields required to be completed include:

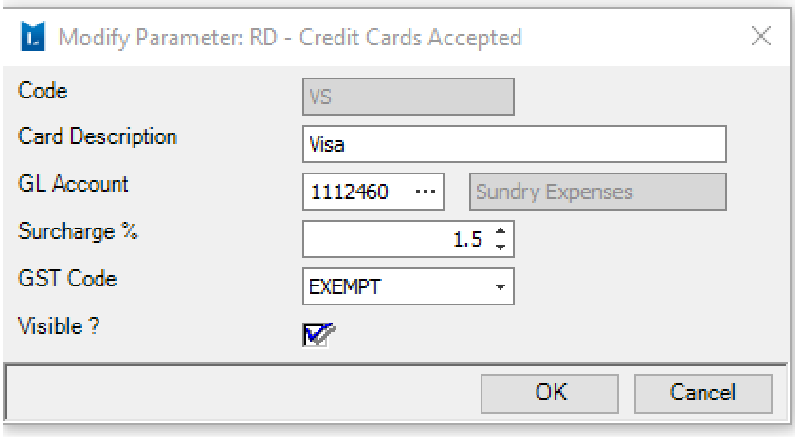
❖ Code – this field defines the Credit Card used when selecting the card from parameter lookups (ie a Credit Card lookup);

❖ Card Description – usually this contains the type of Credit Card the parameter applies to e.g. Visa, Master card, Diners and American Express;

❖ GL Account – is the GL Account number to record the surcharge recovery.

❖ Surcharge % - is the percentage surcharge to be applied when receiving payments using this type of type.

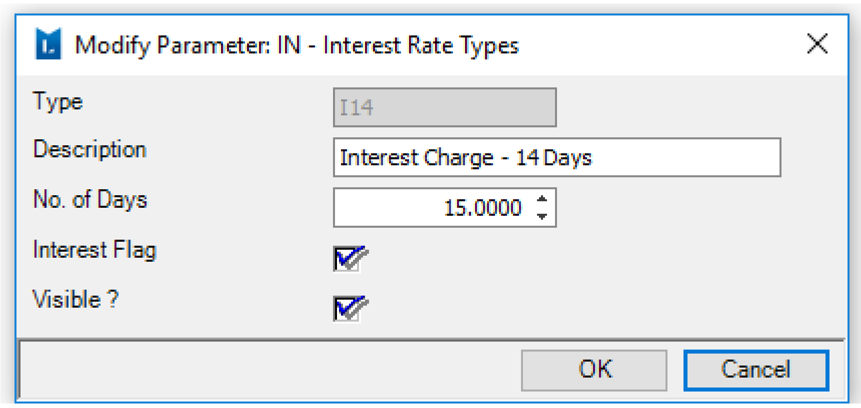
❖ GST Exempt – whether GST is applicable to the surcharge.



Interest Rates Types

This parameter allows the firm to define different types of Interest Rates for particular matters. Fields required to be completed include:

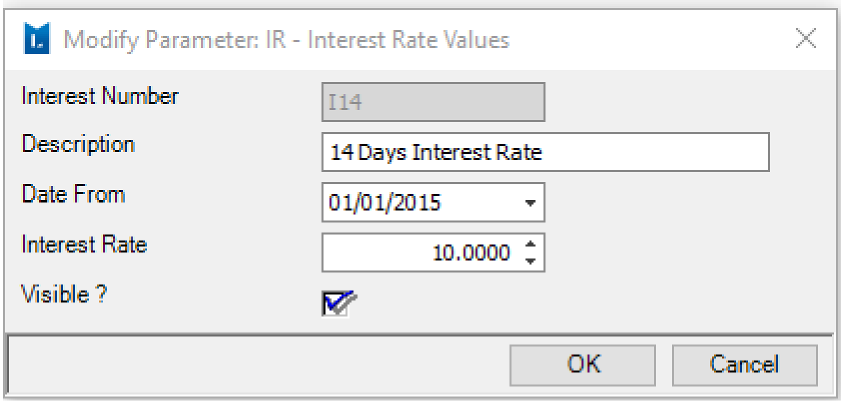
- Type – This is a user defined code (3 character limit) used to identify the Interest Rate e.g. FL (Family Law) or SC (Supreme Court).
- Description – Description of the Type e.g. Family Law Interest Rate
- No. of Days – Specify the number of days after the invoice date before the interest may be calculated.
- Interest Flag – Tick the box to raise interest only after the number of days from invoice date as specified in previous field have elapsed.



Interest Rates Values

This parameter allows the firm to define the interest rate values for the specified interest rate types as created in the above parameter. Fields required to be completed include:

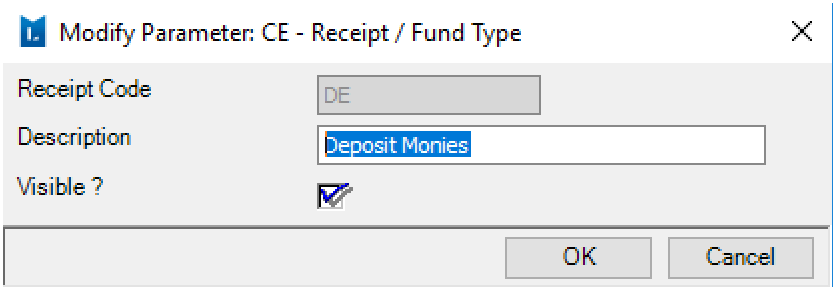
- Interest Number – This field defines the interest rate value in the format of XXXnn where XXX is the interest rate type e.g. I and nn is a number between 01 and 99 to identify each rate value for the rate type eg. I14;
- Description – Description of the interest rate value e.g. 14 days Interest Rate;
- Date From – The date from which the interest rate becomes effective.
- Interest Rate – The interest rate to be applied e.g. 10%



Receipt Fund Type

Allows you to pre-define narratives which can be selected when inputting a receipt. This is also used to reserve any trust funds.

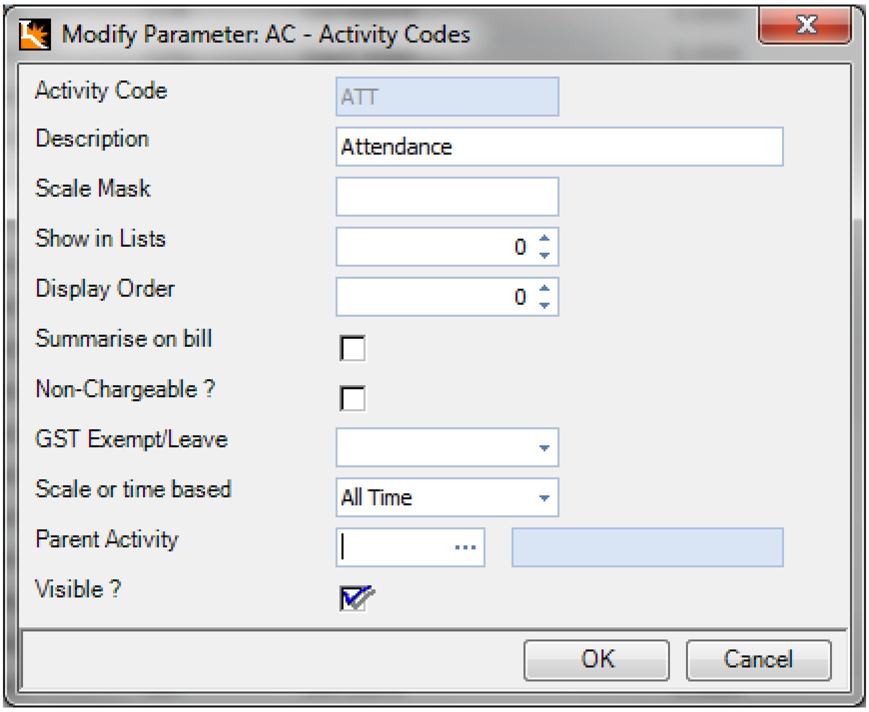
- Receipt Code – defines the abbreviation for the receipt narrative (up to 2 characters) e.g. DE for Deposit Monies;
- Description – the receipt narrative e.g. Deposit Monies.



Matter and Client

Activity Codes

Activity Codes are used when entering time in the Matter Workbench. In order for a user to enter time, an activity code must be selected. These activity codes are defined by the firm and have an 8 character limit (see below).



- ❖ Other fields to be defined within the Activity Codes include:
- ❖ Scale Mask – Only Matters with a Scale Type matching this mask will display the Activity Code to the user when entering time. E.g. If an Activity Code has a Scale Mask of 2, only matters which have Scale Type of 2 will display that activity code when time is being recorded.
- ❖ Show in Lists – There are three choices available for this field:
    - ➢ If '1' is entered then this Activity Code will always be displayed in the lookup list for Activity Codes.
    - ➢ If '0' is entered then this Activity Code will be displayed in accordance with the Matter Charge Type and the Scale or Time based field (see below), e.g. if the matter Charge Type is set 'To scale' and the Scale or Time based field in Activity Code parameter is set to 'Scale' then this Activity Code will be displayed, if any other scale settings are used (Time or Mixed) then this Activity Code will not be displayed in the lookup list.

- ➢ If '-1' is entered then this Activity Code will never be displayed in the lookup list.

- ❖ Display Order – A value from 0 to 9999 to specify the display order for Activity Codes in the lookup list. If not values are specified in this field then activities will be displayed in alphabetical order by Activity Code e.g. ACMA, ADM, AL etc.

- ❖ Summarise on Bill – There are two choices for this field:

  - ➢ Leave blank to display all activities on the bill.

  - ➢ Check to summarise all transactions for this Activity Code on the bill.

  - ➢ Note: The billing screen has an activity code override. The following options are available:

    - Summarise Flag – Will summarise according to the AC parameter.
    - Summarised – Will summarise all activity codes that have a suitable parent specified in the AC parameter.
    - Itemised – Performs no summarising of the activity codes.
    - Hide – Removes table 2 activity from the bill form.

- ❖ Non-Chargeable? – If the Activity Code is to be non-chargeable e.g. 0 value, then this box needs to be checked.

- ❖ GST Exempt/Leave – There are three possible choices for this field:

  - ➢ BLANK' to be selected if subject to normal GST conditions.

  - ➢ 'EXEMPT' to be selected if the activity is to be GST exempt.

  - ➢ 'LEAVE' is selected to update resource unavailability time.

- ❖ Scale or time based – There are five options available for this field:

  - ➢ "Time' to be entered if this Activity Code is to be used only for matters with Charge Type of 'Time based fees'.

  - ➢ 'All Time' to be entered if this Activity Code is to be used for matters with Charge Types of 'Fixed price', 'Time based fees', 'Productive legal work but not chargeable' and 'Fixed fee excluding disbursement (for debt collection matters)'.

- Scale' to be entered if this Activity Code is to be used only for matters with Charge Type of 'To Scale'.

- 'Mixed Time' to be entered if this Activity Code is to be used only for matters with Charge Type of 'Mixed Time'

- 'Both' which will be implemented as follows:

- If the matter charge type is:

  - Time then calculation is time units * rate
  - Scale then calculation is scale units * rate
  - Mixed then calculation is – if activity is specified for Charge Rate and Scale Rate is specified and scale units are input then scale units * scale rate else time units * rate.

- Parent Activity – a parameter driven list – select the activity that this activity code will be reported under on bills.

- Examples of the use of 'Summarise on Bill' used on conjunction with 'Parent Activity:

  Activity Code TA has a Parent Activity of T – therefore all TA's reported on bills will be displayed as T's. 4 transactions are entered as follows:

  - 11/1/2008, Activity Code T, 10 Units
  - 11/1/2008, Activity Code TA, 15 Units
  - 14/1/2008, Activity Code T, 20 Units
  - 14/1/2008, Activity Code TA, 25 Units

  If Activity Code TA is marked as 'Summarise on Bill' (recommended), and T is not, then the following will be shown on the bill:

  - 1 transaction on 11/1/2008 – T – 10 Units
  - 2 transactions on 14/1/2008 – T – 20 Units, T – 40 units

  If Activity Code T is marked as 'Summarise on Bill', and TA is not, then the following will be shown on the bill:

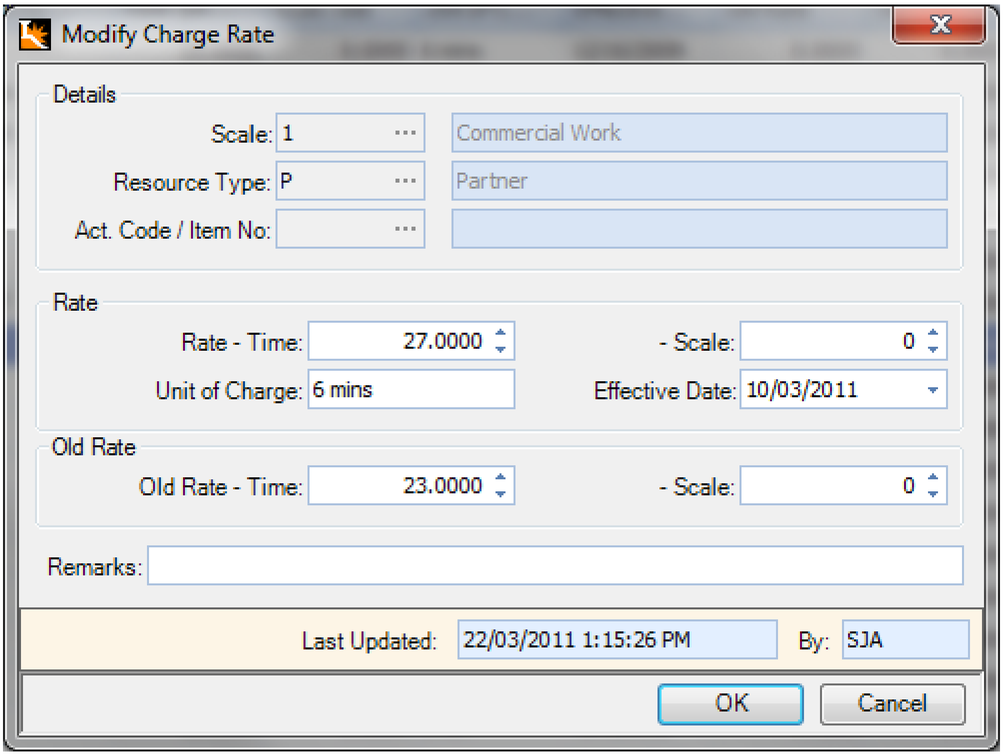
  - 1 transaction on 11/1/2008 – TA – 15 Units
  - 2 transactions on 14/1/2008 – TA – 25 Units, T – 30 units

If both Activity Codes TA and T are marked as 'Summarise on Bill', then the following will be shown on the bill:

- 1 transaction on 14/1/2008 – T – 70 Units

Charge Rates

Charge rates are used in conjunction with the Entity/Matter Scale Types and allow the firm to set the charge out rates for particular resources and activities within a given scale. An Entity/Matter Scale Type must first be defined before creating Charge Rates. When selecting the Charge Rates parameter, a grid of all existing charge rates are displayed, right clicking to access the context menu will allow new charge rates to be added.



Charge Rates are defined as follows:

Details

- Scale – This is the scale this charge rate will be applied to, as defined by the Entity/Matter Scale Types parameter.

- Resource Type – If setting the charge type for a particular resource, this resource type must be specified e.g. P-Partner, S-Solicitor. If this charge type is to be set for all resource types then an asterisk (*) must be entered into this field.

- Act. Code/Item No – If setting the charge type for a particular Activity Code, this activity code must be entered as defined by the Activity Code parameter. If the costing is not to be activity based, leave this field blank.

Rate

- Rate-Time – This is the value in dollars including/excluding GST per unit of charge. See Accounting - GST Rates Parameter to determine whether amount should include GST or not.

- Scale – This is also the value in dollars including/excluding GST however is used when costing to the court scale. If not costing to a court scale, this field can be left blank. See Accounting - GST Rates Parameter to determine whether amount should include GST or not.

- Unit of Charge – What unit of charge is being used e.g. 6 minute units, then enter “6 mins”.

- Effective Date – The date from which this charge rate becomes effective.

Old Rate

- Old Rate-Time – When modifying a Charge Rate, the old rate can be noted in this field.

- Scale – Again, when modifying a Charge Rate, if the old Charge Rate was based on costing to scale, this old Scale amount can be noted in this field.

- Remarks – Free typing field for any notes regarding charge rate.

Client Attribute Types

- This is a two character code for attribute types or categories e.g. IN – Industry. Attribute codes are then set up beneath these types or categories (see below).

- Other fields to be defined within the Client Attribute Types include:

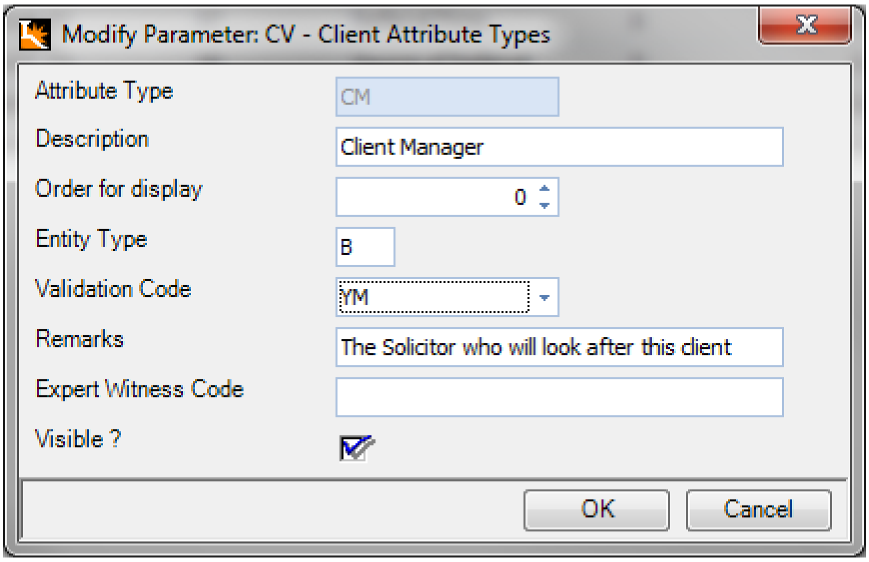
- Order for Display – defines the order in which attributes are displayed in browser.

- Entity Type - for controlling which attribute types are displayed to ‘P’ (people), ‘N’ (non-people), and ‘B’ (both) type entities

- Validation Code - Enter ‘Y’ if only one Client Attribute Code may be entered for this Client Attribute Type for an entity. Leave blank if multiple Client Attribute Codes may be entered for this Client Attribute Type. Also enter 'M' if this attribute is to be included in the Mandatory Set e.g. 'YM' in this field if this is to be a single value mandatory attribute.

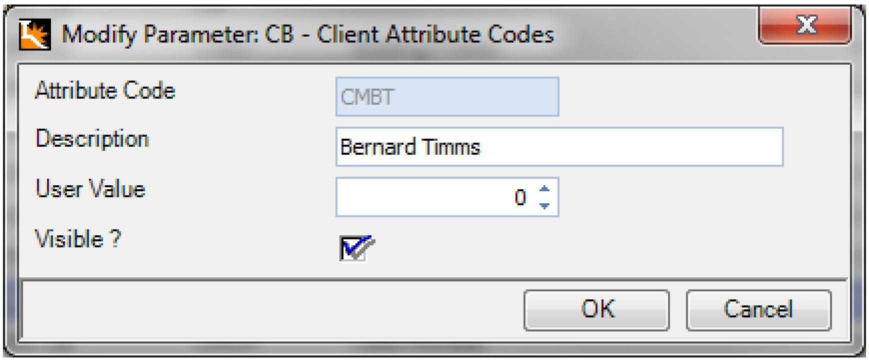
❖ Remarks - enter remarks to be displayed to the operator on input of this attribute type.

❖ Expert Witness Code - enter 'T' for Expert Witness by Type or 'G' for Expert Witness by Geographical Location. Only one 'CV' Client Attribute Type parameter need be set for each Expert Witness Type and Geographical area. Then add the Expert Witness Type and Geographical codes in 'CB' Client Attribute Code parameter (see below). Entity Attributes can then be added for each Expert Witness and Geographical area, these can then be searched on. See Expert Witnesses for further information.



Client Attribute Codes

This is a four character code for specific attributes to be listed within an attribute type or category. The first two characters of this four character code must be the two character attribute type as set up in the Client Attribute Type parameter. The remaining two characters may then describe the Client Attribute Code e.g. INRE – Industry/Real Estate.

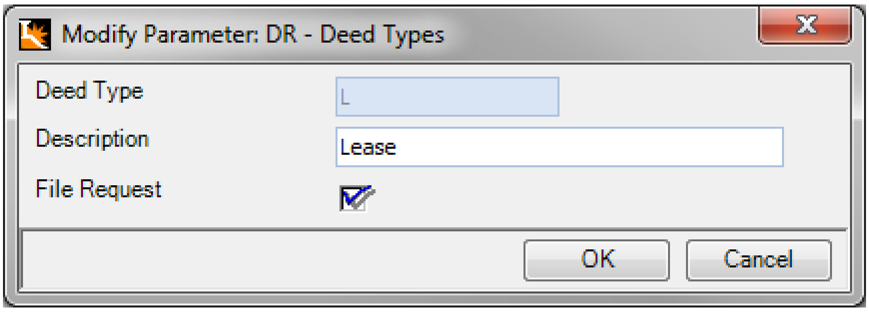


Deed Types

LawMaster provides the facility to record items (deeds/securities) held on behalf of clients e.g. Wills, Certificates of Title, and Deeds of Agreement etc. Full tracking of deeds is supported.

When entering a Deed into LawMaster, the item must be classified by a particular Deed Type. The Deed Types are defined by the firm using the 'DR' Parameter and require completion of the following fields:

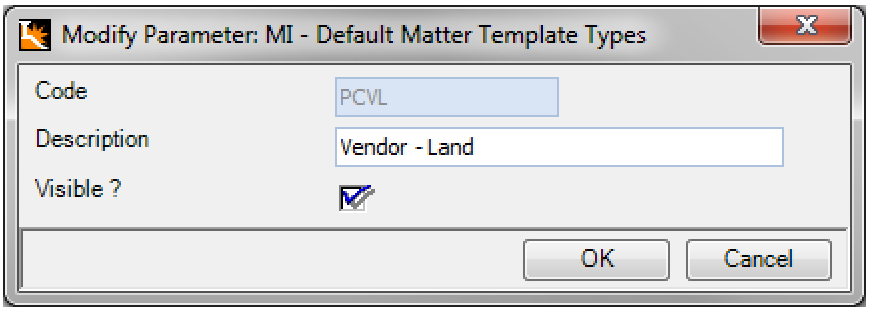
- ❖ Deed Type – A code to uniquely identify this deed type.
- ❖ Description – Full description of the deed type.
- ❖ File Request – Tick if File Requests are allowed for Deeds of this type.



Further information in relation to Deed Enquiry; Maintenance etc. can be found in LawMaster System Overview: Search for Deed Enquiry. You will presented with a full list of further information.

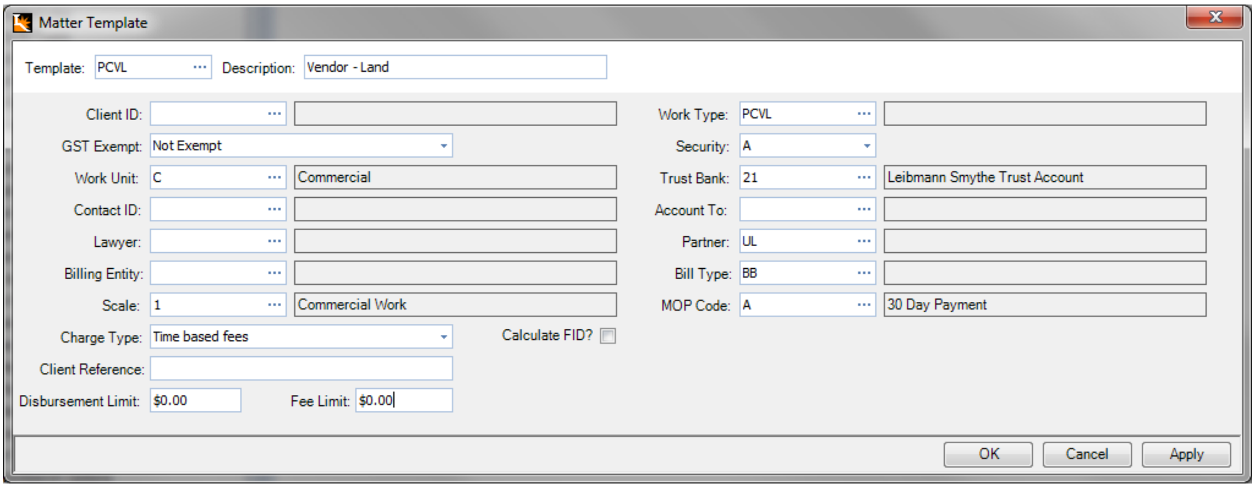
Default Matter Template Types

This is a 1 to 9 character code which must first be defined in order to create the Default Matter Template.



Default Matter Template

Default Matter Templates allow the user to set default values for most fields in the Add Matter screen for commonly used clients and matter types e.g. when opening a matter for a vendor conveyance (land), certain information may always be the same. Instead of manually entering this information each time a matter is opened, the Default template can be selected and these values will be entered as the default for that matter. The remaining fields may then be completed and the matter opened.



Disbursement Codes

Disbursement Codes are used when entering disbursement details in the Matter Workbench. In order for a user to enter a disbursement, a disbursement code must be selected. The fields to be defined within the Disbursement Codes include:

- Disbursement Code – 4 character code e.g. COPY
- Description – Description of the disbursement e.g. Photocopies
- Recovery Account – (GL Account) – If the disbursement is a non-cash disbursement e.g. Photocopying, facsimiles, postages and petties a non-cash recovery account must be specified.
- Unit Rate (Inc. GST) – Value in dollars per unit of disbursement e.g. 0.10 (10 cents a copy). User then enters the number of copies in the Disbursement Units field of Matter Workbench.
- Billing Flag – If box is ticked then a summary of this disbursement will be shown on the bill.

- GST Exempt – If the disbursement is GST exempt then "EXEMPT" should be entered into this field. If the firm does not pay GST on a disbursement but charges the client GST then "PAYEX" should be entered into this field.

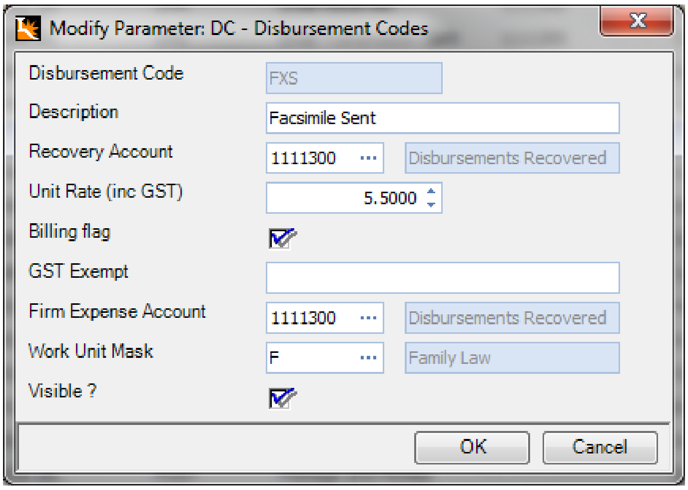
- Firm Expense Account – If the disbursement is non-chargeable, then a GL Account should be entered into this field and the disbursement will be posted to this account.

- Work Unit Mask – Matters with a Work Unit matching this mask will display the Disbursement code to the user when entering time.

- Visible? – If ticked, will be displayed in Disbursement code lookup. When unticked, removes from Disbursement Code lookup.

Note:

- If the matter for which the expense is being input is not chargeable i.e. Matter Charge Type = 'N', 'P', or 'Z' then the system will get the GL Account from the Firm Expense Account field. By default, if this account is blank or does not exist, the system will use the Recovery Account field.



Document Assembly Workflow Templates

This area will be set up by LawMaster's Automation Team when loading your templates.

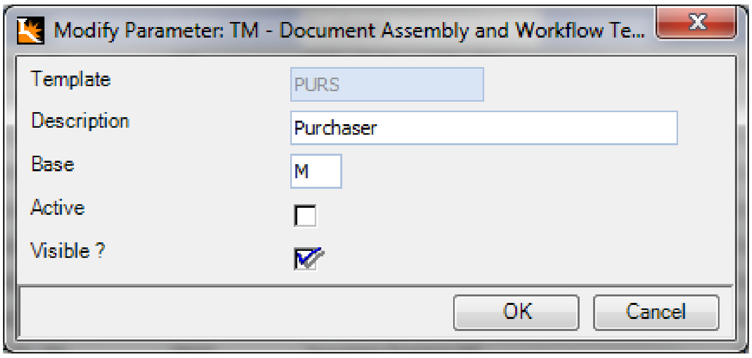
Each template must be defined in the system and this is achieved by using the Document Assembly and MTM Templates (TM) parameters. These parameters are located from the Menubar ➔ Parameters ➔ Set Parameters ➔ Matter and Client.

It is the usual practice to use the same Template type for both Template Variables and Task Management templates however it is possible to set up a different Template type for each. For example:

If you chose to automate the Conveyancing area of law you could set up a TM parameter of 'CONV' to be used as the Template Variables template for Conveyancing. You could then set up a separate TM parameter to be used as the Task Management template for each of the different types of conveyancing such as 'VEND' for Vendor Conveyancing and 'PURS' for Purchaser Conveyancing.

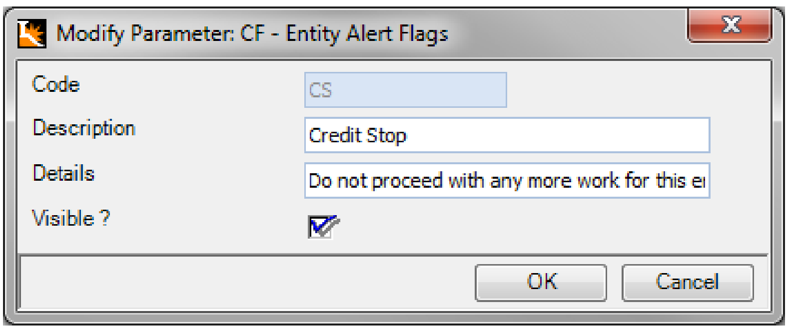
The 'CONV' Template Variables template would contain all of the template variables relevant to both Vendor Conveyancing and Purchaser Conveyancing. The 'VEND' and 'PURS' Task Management templates would contain the workflows specific to each type of conveyancing.

Each template type parameter must also have the Base field nominated. This Base field specifies the LawMaster application that this template will apply to e.g. M – Matters, P – Payroll, D – Deeds, C – Entities, and Q – New Client Enquiries. The Active field must also be ticked for active non-matter related templates.



Entity Alert Flags

Alert flags may be set up via this parameter and set against an entity within the database.



Entity Relationships

It is possible to link two entities in the database who share a relationship. These relationships must be defined via the Entity Relationship Codes parameter. The relationships are defined as 5 character codes in the format XX-YY. The following applies to the setup of these parameters:

- XX – type of parent identifier in relationship
- YY – type of child identifier in relationship
- For each XX-YY code a corresponding YY-XX code must be defined
- Each part XX and YY must be exactly 2 characters in length
- Examples of code combinations include:

  - PA-CH Parent of Child
  - CH-PA Child of Parent **Corresponding XX-YY and YY-XX Codes**

  - CO-DI Company to Director
  - DI-CO Director to Company **Corresponding XX-YY and YY-XX Codes**

  - CL-RE Client to Referrer (i.e. who referred client to firm)
  - RE-CL Referred to Client **Corresponding XX-YY and YY-XX Codes**

Note: The primary entity (XX) is referred to as the 'Selected Entity' and the secondary entity (YY) is referred to as the 'Related Entity'.

LawMaster has also included a number of pre-defined relationship codes. These include:

- Link Address
  - ZP-ZC Parent to child mailing address link.
  - ZC-ZP Child to parent mailing address link. The Child Entity always takes its mailing address from the Parent Entity.

- Joint Entities
  - ZI-ZJ Linked Entity - Individual
  - ZJ-ZI Linked Entity - Joint

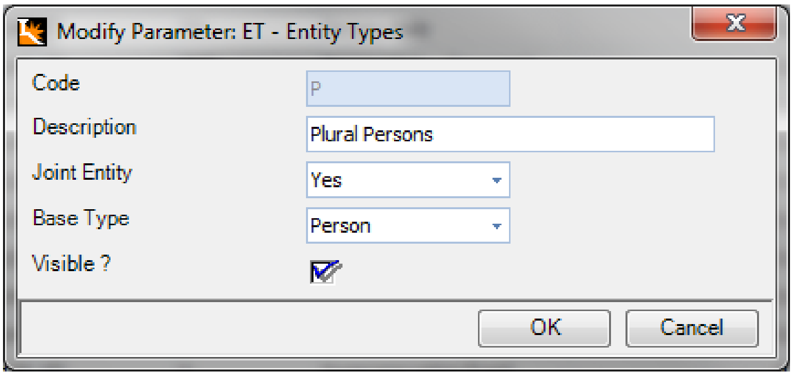
Individual entity of a joint entity relationship.

- Credit Control
  - ZM-ZS Credit Control - Parent
  - ZS-ZM Credit Control - Child

If the parent entity is on stop credit, then the related child entities will be treated as on stop credit. This relationship type is also used to group related entities together from the point of view of establishing total fees worth to the law firm. The Debtors included in the Combined Debtor Statement and Statement for Related Debtors are determined by this relationship

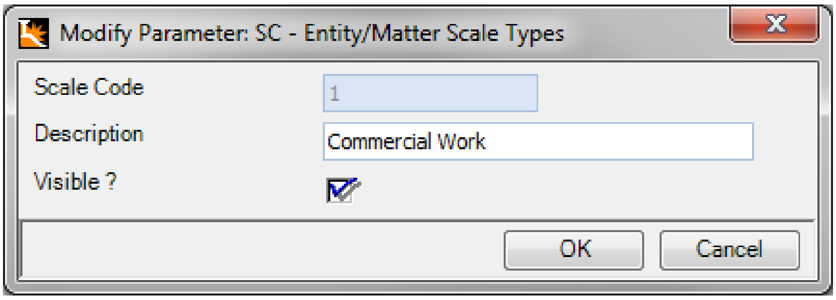
Entity Types

When an entity is added to the database, the type of entity must be defined. The types available are controlled by the Entity Types parameter. A standard set of Entity Type parameters are provided e.g. PM – Person Male, C – Company etc. Others may be added. Validation rules on the Add Entity module are dependent upon the Entity Type used e.g. an Entity Type of C – Company will not allow a user to enter details in the Title and Given Names field. When adding an Entity that uses an Entity Type commencing with N e.g. N - Plural/Mixed Entities or NN - Plural/Mixed Entities - Non-Resident, all fields within the Add Entity screen are opened and any combination of Companies and Individuals will be allowed.



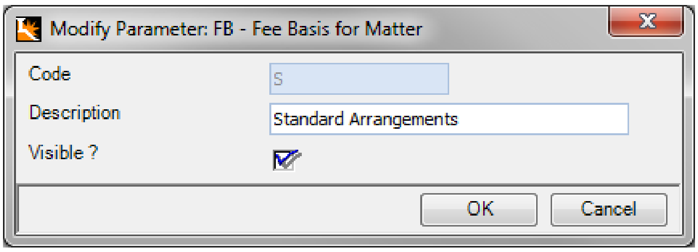
Entity Matter Scale Types

In order to set the Scale type when adding an entity to the database the appropriate scales must be set up via the Entity/Matter Scale Types parameter e.g. scale ‘1’ might be Commercial Work, while scale ‘2’ is for Litigation.



Fee Basis for Matter

The basis of how fees are to be paid for a matter.



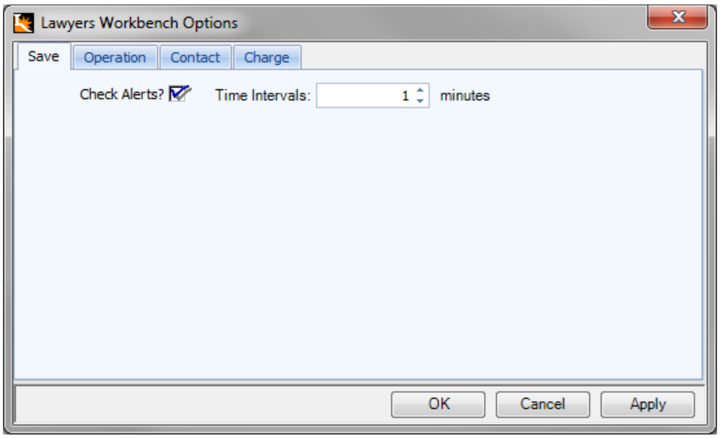
Lawyers Workbench Options

The Lawyers Workbench Options are made up of a number of tabs as follows:

Save tab

LawMaster has a facility to automatically save the Matter Workbench data for each open matter. This parameter allows the firm to set the interval (in minutes) to be used when automatically saving this data.

This tab also contains a Check Alerts setting. If this box is ticked then LawMaster will check for alerts using the setting under Time Intervals for frequency.



Operation tab

Warn user if WIP exceeds WIP limit
If this option is ticked, then when a time entry is accepted in Matter Workbench, and the WIP (for the transaction being entered) plus matter WIP is greater than the WIP limit, then a warning message is displayed advising the user of this.

Prompt to append to existing file note
If this option is ticked, when entering a file note, LawMaster will prompt the user if other file notes already exist for this matter for today and allow the choice to append this file note to the existing file notes. This may be overridden on a user basis for selecting from the Menu Bar ➔ Lawyer Options ➔ Set Prompt for Documents

Time Narrative to default to first sentence of file note
If this option is ticked, when entering file notes and time entries in Matter Workbench the first sentence of the folio (up to the full stop) is placed in the Time Details Narrative. After selecting an activity code the first sentence replaces the activity description for the chosen code.

Only Display Recent Matters
When this option is ticked, the Recent Matters screen, which is opened automatically when logging onto LawMaster or via the Matters button on the Lawyers Toolbar, will display "Recently Worked on Matters" as the default view for the firm. If this is not ticked the default view will be "My (and Recently Worked on) Matters".

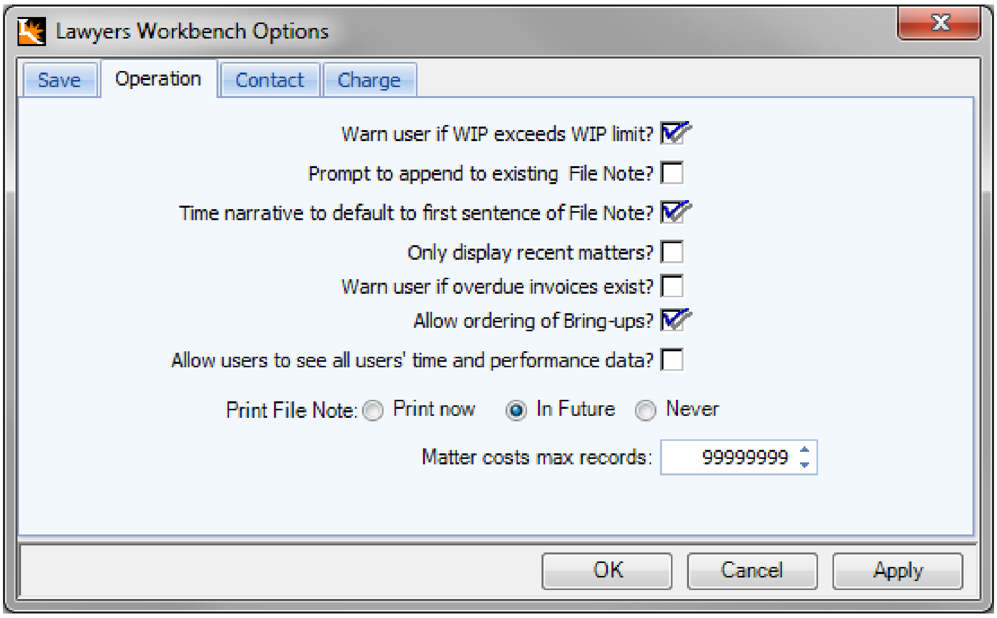
Warn user if overdue invoices exist
If this option is ticked, when a matter is first selected and opened in Matter Workbench, and that matter has overdue invoices then a warning will be displayed to the user.

Allow ordering of Bring-ups
When this option is ticked, the user will be able to re-order their list of bring-ups into a work order for the day. This is only applicable when searching for Delegated User Bring-ups.

Allow users to see all user's time and performance data
If this option is ticked, all users will be able to see all other user's Performance data and time entries.

Print File Note
A firm wide default may be set with respect to the printing of file notes from Matter Workbench. Three options are provided – Print Now, Print In Future and Never Print.

Matter Costs max records
A firm wide default may be set to control matter cost records. The Current default value is set to 99999999.



Contact tab

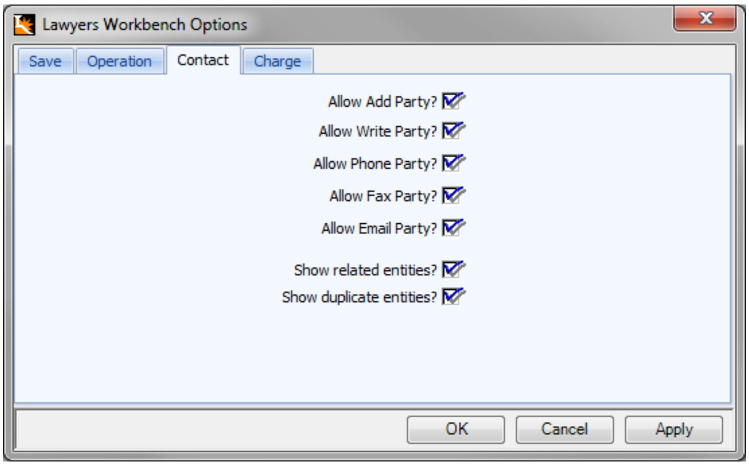
Allow Add Party
If this option is ticked, the facility to add parties to the Contact list will be visible to users.

Always show related entities?
If this option is ticked, the 'Show Related Entities' button in the Contact screen will be selected by default, which will include all related entities for that matter in the matter Contact list.

Allow Write Party?
If this option is ticked, the facility to Write to parties in the Contact list will be visible to users. If not, the button will not appear to users and they will not be able to perform this function.

Allow Phone Party?
If this option is ticked, the facility to Phone parties in the Contact list will be visible to users. If not, the button will not appear to users and they will not be able to perform this function.

Allow Fax Party?



If this option is ticked, the facility to Fax parties in the Contact list will be visible to users. If not, the button will not appear to users and they will not be able to perform this function.

Allow Email Party?
If this option is ticked, the facility to Email parties in the Contact list will be visible to users. If not, the button will not appear to users and they will not be able to perform this function.

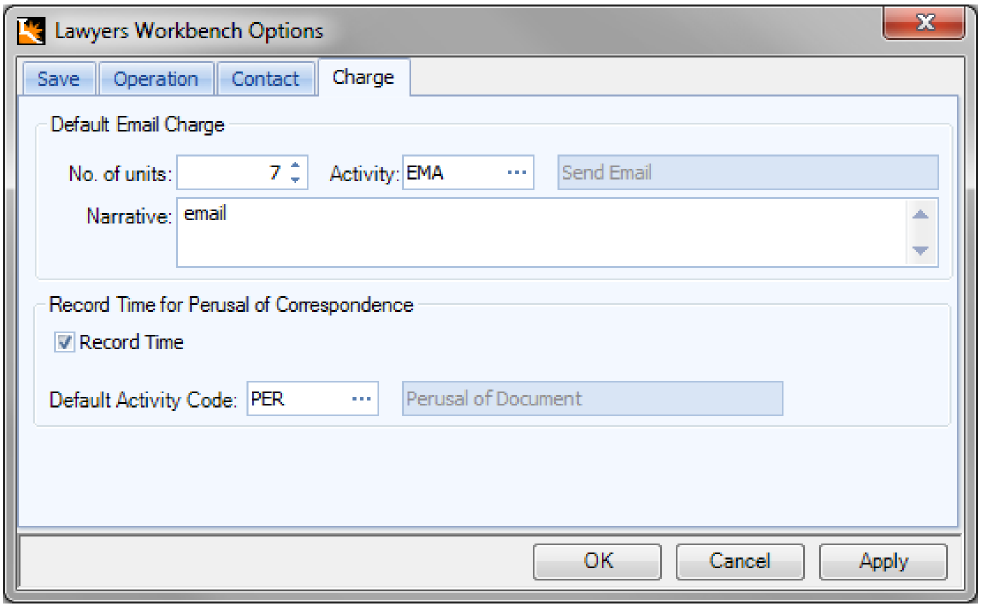
Show Related Entities?
If this option is ticked, by default all contacts and their related entities will be shown in the Contacts screen. This can be toggled by way of a context menu item in the Contacts screen.

Show Duplicate Entities?
If this option is ticked, by default if the same entity is added using multiple party types, only one instance of the entity will be seen. This can be toggled by way of a context menu item in the Contacts screen.

Charge tab

Default Email Charge
Allows a time entry, as specified, to be automatically written on to the matter when an email is sent or saved. The number of units, activity code and transaction narrative may be entered.

Record Time for Perusal of Correspondence
Allows a time entry, as specified, to be automatically written on to the matter when an item of inwards correspondence is marked as read.



Matter Alert Flags

It is possible to set an alert on a matter so that when a user opens the matter in Matter Workbench an icon is displayed indicating that important information has been noted. Details of the alert can then be viewed by the user. The following fields need to be completed:

- Alert Type – A one character code to uniquely identify parameter e.g. 'S'

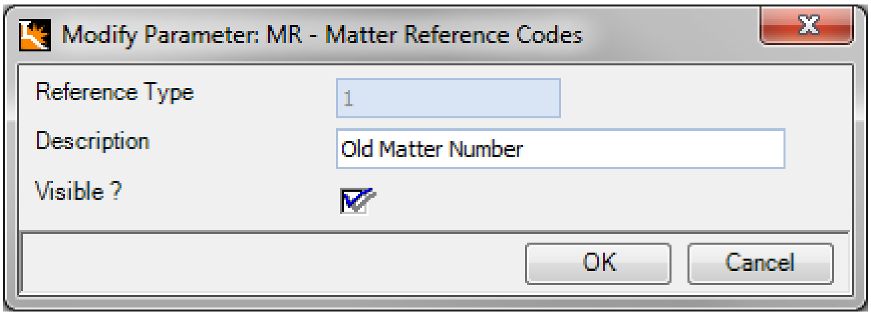
- Description – A description of the type of alert e.g. 'Suppression Order'
- Details – Further details relating to the Alert which can be viewed by users when opening matter.

Matter Reference

Matter reference codes provide an additional facility to enquire on matters. For example, searching for matters using matter numbers from the previous system, searching for personal injuries matters with a particular injury type. The fields which must be defined are:

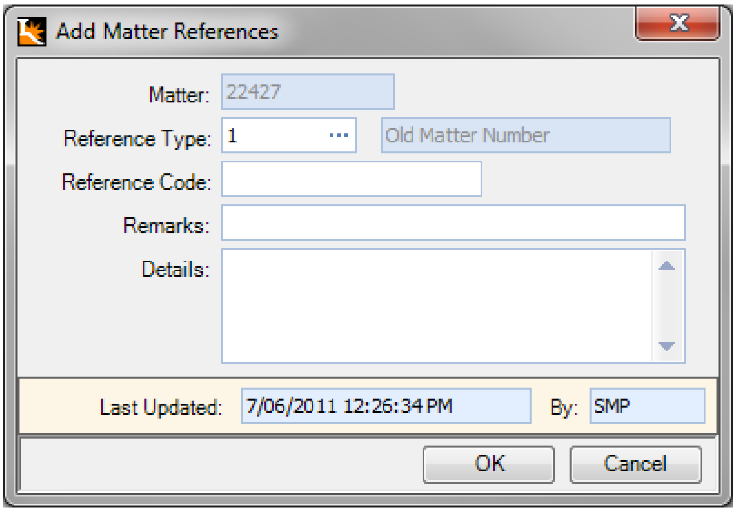
❖ Reference Type – A two character code to uniquely identify this parameter e.g. IC

❖ Description – A description of the Matter Reference Code e.g. Injury Codes



Matter Menu ➔ References ➔ Add Matter Reference

Matter references provide a user definable and structured way of indexing matter related data. Examples of the use of matter references include the area of law matter falls under, outcome of matter and matter number from a previous system. The facility is provided to add, modify or delete matter references via the context menu. In order to add a matter reference a Reference Type must be specified as defined by Matter Reference Codes parameters (see Matter Reference Codes for further details).



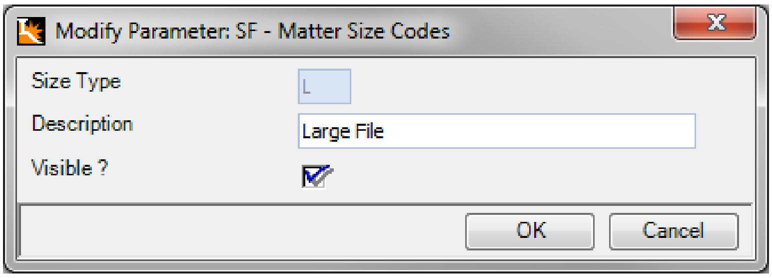
Conduct search on data:

Enquiry ➔ Matter Search ➔ Search by: Matter Reference

Matter Size Codes

It is possible to classify matters according to their size. The sizes are user defined and must first be set up via the Matter Size Codes as follows:

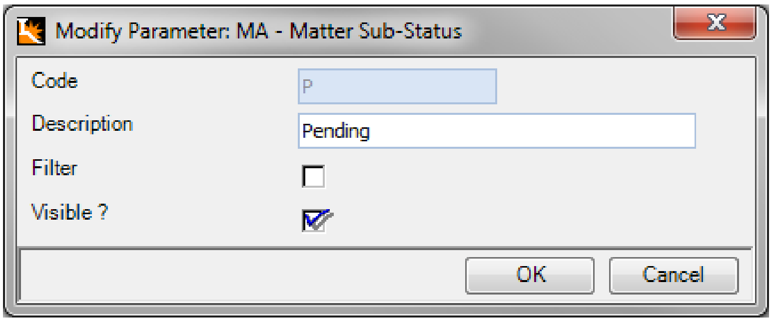
- ❖ Size Type – A one character code e.g. 'S'
- ❖ Description – A description of the size of matter e.g. 'Small'



Matter Sub Status

All matters have a primary status which is either open or closed. Matters can also be classified according to their sub-status, for example, pending, settled etc. The fields to be completed include:

- ❖ Code – A two character code to uniquely identify the status e.g. 'S'
- ❖ Description – A description of the status e.g. 'Settled'



Method of Payment Codes

The method of payment for a matter is defined when adding the matter to the system. The method of payment codes allow the firm to set up a number of payment arrangements via these parameters. Fields for completion include:

- MOP Code – A one character code to uniquely identify this parameter. This can be left blank to set up a default code. The MOP Code field in the Add Matter screen is mandatory. If users are to leave this field blank when adding a matter, there must be a corresponding 'blank' parameter.

- Description – A description of the code being set up.

- Repayment ind – Period for instalment repayments. Either 'D' for day or 'M' for month can be added into this field.

- Frequency – The repayment frequency i.e. the number of days or months as defined in the Repayment ind field.

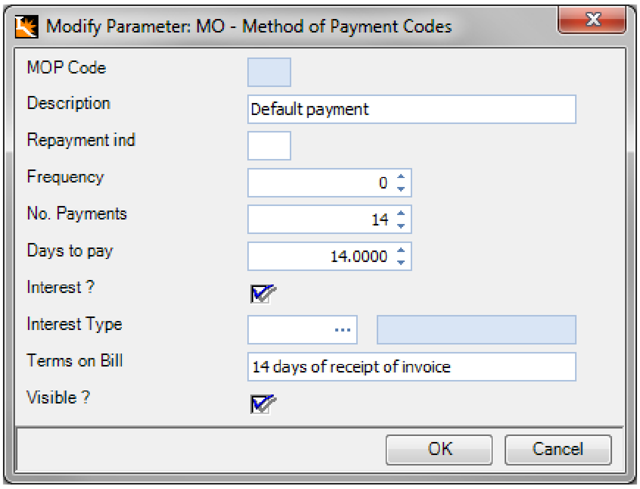
- No. Payments – The number of instalments

- Days to pay – The number of days to pay (the default is 16).

- Interest? – If interest is to be calculated on payments then this box must be checked.

- Interest Type – Insert value detailed in Parameter Type IN - Interest Types (this records the number of days after a bill before interest is accrued). For further information refer to Interest Rate Types

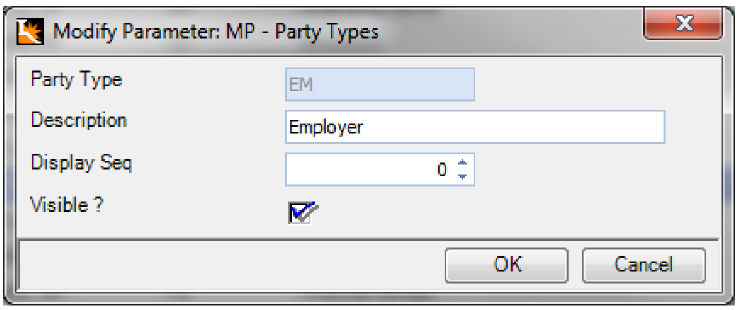
- Terms on Bill – The terms for billing e.g. 10 days of receipt of invoice.



Party Types

In order for an entity to be added as a party to a matter, it must be allocated a Party Type. Party Types are defined by the firm however SP, CL, MB, MC, ZE, **, $$, $* cannot be used as party types as these are system defined and reserved for use by LawMaster. The following fields must be defined:

- Party Type – Any two character code to uniquely identify the party type (other than those mentioned above) e.g. MG
- Description – This is a description of the party type e.g. Mortgagor
- Display Seq – This field allows you to set the order for display of party types in the Matter Workbench Contact list. These should be sequenced numerically e.g. 0, 1, 2, 3, etc.



Processing Options

The Matter and Client Processing Options allow a number of firm wide settings to be made as follows:

❖ Matter Prompt List – Placing a tick in any of the following boxes will ensure that when the Additional Data Items screen is presented after adding a matter, the corresponding box will also be ticked by default:
   - Bring-up
   - Reference
   - Parties
   - Estimates - If the firm uses benchmarks, it is envisaged that this will be ticked to ensure that estimates are added when a matter is created.
   - Labels

- Client Prompt List – As with the Matter Prompt List, selecting any of the following from the list will ensure that when the Additional Data Items screen is presented after adding an entity, the corresponding box will also be ticked by default:

  - Related Entities
  - Attributes
  - Matter

- Allow Entity to Have Matters – If ticked, this parameter will tick the Allow Matters field in the Add Entity screen as default.

- User Allocation of Matter Number – If this box is ticked the user must allocate a matter number to the matter being added. If it is not checked then LawMaster will assign the matter number automatically. Matter numbers are limited to 8 digits.

- System Allocation of Archive No – If this box is ticked the user must allocate an archive number to the matter being closed. If it is not checked then LawMaster will assign the archive number automatically.

- Calculate FID – Tick this box to calculate FID/BADT on trust transactions and creditor costing transactions for the firm.

- Show All Activities – When ticked this setting will allow all activity codes to be displayed in the lookup list when recording time. If not, the activity codes will be displayed according to the settings in the Scale or Time Based field in the Activity Code parameter.

- System Allocation of Packet No – If this box is ticked, LawMaster will allocate the packet number when adding deeds. If not ticked, the user will need to allocate the packet number.

- Round up – If ticked, this parameter will round units up to the nearest whole number.

- Allow closed – If this box is ticked, LawMaster will allow matters to be closed with uncleared cheques.

- Billing–Print Trust Statement – This parameter, when ticked, indicates that if a matter is to be billed and has trust transactions since the last time the matter was billed, a trust statement is to be printed.

- Default to Master? - This will specify if certain changes to a master matter will propagate down to its sub-matters i.e. Work type, work unit, security level, sub-status, alert flag or lawyer.

- Billing-Show Trust Credit? - When ticked, the trust balance will be shown (firm funds only) in the Matter Workbench ➔ Bill screen ➔ Override Trust Credit Amount. If un-ticked, this field will be blank.

- Check Matter has an Estimated fee - If this is ticked, when adding or modifying a matter where the Matter Charge Type = 'Fixed Price', 'Time Based Fees' or 'Mixed Time a message will be displayed to the user advising them that the Estimated Fees must be specified.

- Non-Charge Flag – If this box is checked, the system will make non-charge units include zero value work item for legal work

- Create File Note for Matter Bring-ups – If this box is checked, a file note will be populated when a matter bring-up is auctioned.

- Exclude A/C's in debtor balances – if checked, exclude anticipated disbursements and creditors in debtor balances.

- Check Matter has a referral – This parameter allows the firm to set the referral on adding a matter as a mandatory field if checked.

- Compulsory Matter Fields which ensure the following fields are completed when adding or modifying a matter:

  - Paralegal
  - Estimated Fees (where charge type is not 'N')
  - Quantum
  - Estimated Bill Date

- Minutes per unit – The number of minutes per unit is entered in this parameter in order for Matter Workbench to automatically calculate time spent on matters.

- Units per Day – The total number of units to be recorded by resources each day e.g. 80.

- Default Cost Type – Enter an activity code to appear as the default activity when entering cost journals.

- Default Disbursement Code – Enter a disbursement code to appear as the default disbursement when entering cost journals.

- FID Code – If ticked, the system will calculate FID/BADT on trust transactions and creditor costing transactions for the firm.

- BADT Code – Select a disbursement code for BADT to use when posting to the matter.

- State – Select the state in which the firm is practicing.

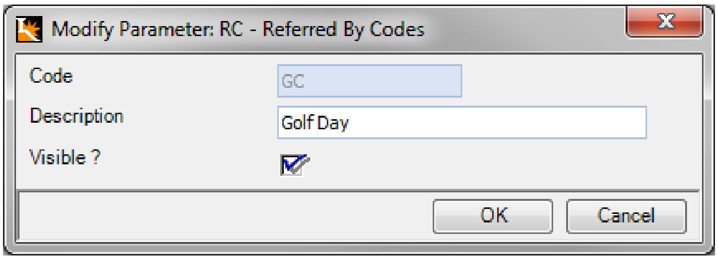
- Debtor Bring-ups and File Notes – This parameter determines whether debtor bring-ups and file notes will be saved to the Matter or Debtor.

- Minimum WIP for Matter Browser – This parameter allows the firm to enter a minimum default value to appear in the WIP field of matter search screens i.e. Search by Lawyer, Work Unit and Work Type.

Referred By Codes

When adding matters and entities it is possible to specify who the matter or client was referred by. The options available in those fields are user defined and controlled by the Referred By parameter. The following fields must be defined for the parameter:

- Code - This is a four character code which uniquely identifies the parameter e.g. ADVT
- Description – A description of the code e.g. Advertising
- Parent Code - This is the code for the parent referral body / process of the given referral object. This code is used for linking referral objects together and performing aggregate analysis.



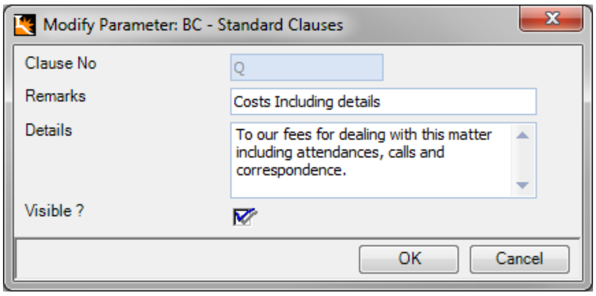
Standard Clauses

When entering file notes in Matter Workbench the same clauses/sentences are often used. The Standard Clauses feature allows users to store these frequently used clauses and select them from a list rather than re-typing them each time. These standard clauses can also be used as a narration when raising a bill. In order to use this feature the following fields must be defined in the Standard Clauses parameter:

- Clause No – This is a four character alphanumeric code which uniquely identifies this clause. If you wish to use the F3 shortcut in the File Note field of Matter Workbench then Clause No's must be one character only e.g. T

- Remarks – This is a description of the clause e.g. Telephone Attendance

- Details – This is where the clause or sentence which is to be used is added e.g. Telephone attendance on



To Do List – Bring Up Escalation

This parameter allows LawMaster to escalate a bring-up after a set number of days if it has not been actioned. To use this feature the following fields must be defined:

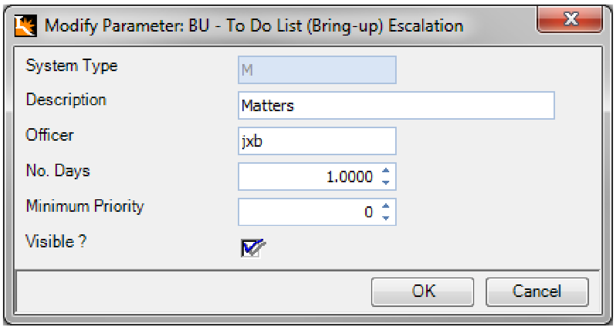
- System Type – This is the type of bring-up i.e. M-Matter, P-Payroll or C-Client

- Description – This is a description of the bring-up escalation e.g. Matters

- Officer – This is the user to which the bring-up will be escalated. For Matter type bring-ups, escalation will be Lawyer, then to Partner and finally to Officer.

- No. Days – This is the number of days which elapse before the bring-up is escalated e.g. 3

- Minimum Priority – This is the minimum priority to apply to escalation of bring-ups e.g. 6



Work Types

Work Types define the area of law for matters and in order to open a matter in LawMaster, a work type must be specified. Work types are defined by the firm and in order to benefit from LawMaster's reporting facilities are normally set up in an indented hierarchical code. The function 'Configure Tree View' in the Set Parameters Context Menu, is able to override the indented hierarchical structure. For more information see Implementation of a Tree View.

The following fields are available for completion for Work Types:

❖ Work Type – This field has a four character limit and it is the use of these four characters which allows the indented hierarchical structure to be set up. It is important to continue the same alphabetical codes when setting up an indented hierarchical structure, as shown in the example below:

P	Property
PC	Property Conveyancing
PCP	Property Conveyancing Purchaser
PCPH	Property Conveyancing Purchaser House
PCPL	Property Conveyancing Purchaser Land
PCPU	Property Conveyancing Purchaser Unit
PCV	Property Conveyancing Vendor
PCVH	Property Conveyancing Vendor House
PCVL	Property Conveyancing Vendor Land
PCVU	Property Conveyancing Vendor Unit

❖ Description – This is the description of the Work Type e.g. Property Conveyancing Purchaser House

❖ Initial Event – It is possible for a Task Management Event to be actioned immediately on opening a matter in LawMaster. If this is what the firm wants to happen for matters with this particular Work Type, then the Event number must be defined in this field.

❖ Recalculate Disb GST – Tick to set GST Billed on all applicable disbursements to full rate as nominated in GST Rates parameter. If unticked the GST Billed amount will be the same as the GST paid.

❖ Default Matter No – This is the matter number to be used in the creation of new matters with this Work Type for client web users (if the client web user's module is being used).

❖ This field is also used to nominate a template matter which is simply a base matter that is used to get the additional properties of a matter not available when setting up a New Client

Enquiry Matter (e.g. bill type, trust bank account etc.). The matter number entered must be already created and have the same Work Type as the WT Parameter being updated.

- Header Flag – This field controls how the Work Type may be used. If the Work Type being entered is to be shown as a header only, then 'Y' should be entered into the field. If the Work Type is to be hidden from the look up list when users are adding matters, then 'X' should be entered. Work Types with 'Y' and 'X' settings cannot be assigned to a matter. If the Work Type is to be shown to users as an available Work Type for assigning to matters, then 'N' should be entered. Using the example above, Header Flag settings for indented hierarchical structure would be:

P	Property – Y – Heading shown to users upon which they can drill down to select appropriate Work Type
PC	Property Conveyancing – X – Used only for reporting purposes, so hidden from users
PCP	Property Conveyancing Purchaser – X – Used only for reporting purposes, so hidden from users
PCPH	Property Conveyancing Purchaser House – N – Work Type available for selection by user
PCPL	Property Conveyancing Purchaser Land – N – Work Type available for selection by user
PCPU	Property Conveyancing Purchaser Unit – N – Work Type available for selection by user
PCV	Property Conveyancing Vendor – X – Used only for reporting purposes, so hidden from users
PCVH	Property Conveyancing Vendor House – N – Work Type available for selection by user
PCVL	Property Conveyancing Vendor Land – N – Work Type available for selection by user
PCVU	Property Conveyancing Vendor Unit – N – Work Type available for selection by user

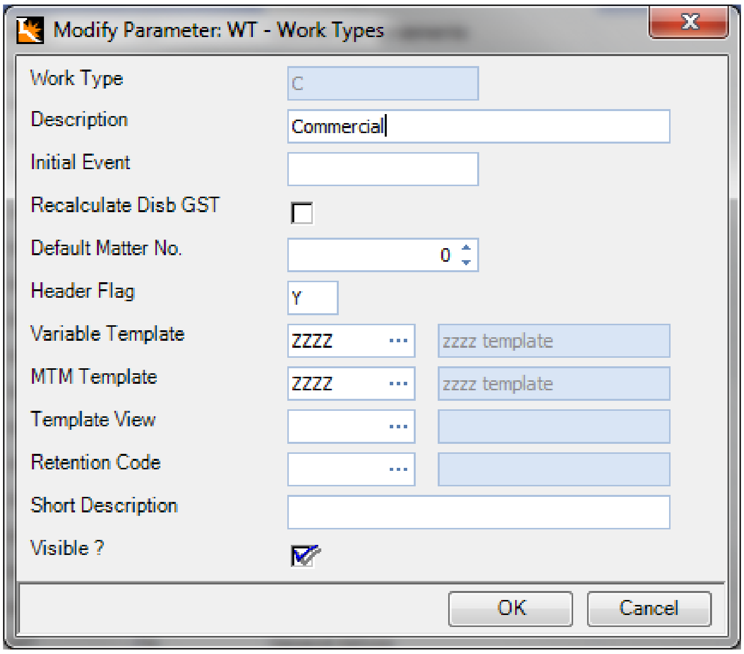
- Variable Template – This is the variable template (as defined by Template Type parameters – See Workflow Development for further details) to be used for matters of this work type when merging letters and running tasks and events e.g. PURS If the Variable Template is the same as the Work Type, then this field can be left blank.

❖ MTM Template – This is the Task Management template (as defined by Template Type parameters – See Workflow Development for further details) to be used for matters of this work type when running tasks and events. This can be the same as the Variable Template and/or the Work Type. If it is the same as the Work Type, this field can be left blank.

❖ Template View – This controls the override for the view in the Matter Summary. If left blank the Variable Template is used for this work type. If you select a different Template View the selected view is used to determine which Template View is used for this work type.

❖ Retention Code – Available choices for this field must be defined by the File Retention Codes parameter (see Records Management for further details). The retention code is used when closing a matter.

❖ Short Description – Used within Workflow. If blank, it uses the Work Type Description.



Miscellaneous Parameters

Outlook Integration ➔ Task / Bring-ups

To enable the synchronisation of LawMaster Bring-ups with Outlook Tasks the Outlook Integration form accessed from the Menubar select Parameters ➔ Set Parameters ➔ Miscellaneous Parameters must have the Tasks / Bring-ups checkbox ticked. The exporting of bring-ups to Outlook does not require the add-in, but the additional functionality within Outlook requires it.

The Bring-up Synchronisation Timer defines the time interval (in minutes) between synchronisation operations from LawMaster bring-ups to Outlook tasks. This may be set to zero to disable. The Synchronisation Enabled option can also be overridden at the resource level from the Main Menu ➔ Resource Management ➔ Enquiry ➔ Resource Enquiry screen – select the resources and using the Context Menu option select Outlook Tasks Integration – System Default, Enabled, Disabled. Each Resource may also be modified individually by selecting Modify. This will require amendment rights to File Class 'O'.

If Outlook Synchronisation is disabled at the firm or resource level the reminder functionality is handled within the LawMaster Practice Management client. If Outlook Synchronisation is enabled, reminders are handled within Outlook.

The Bring-up priority may be mapped with the Outlook Tasks priority range of Low, Normal, or High. On the left hand side are the LawMaster Bring-up priorities to assign as Low, Normal, or High Priority in Outlook Tasks. On the right hand side are the Priority to assign to a Bring-up when assigned via Outlook Tasks, i.e. a High Priority in Outlook will be assigned a Bring-up Priority of 9 when synchronised to LawMaster as per the following screenshot.

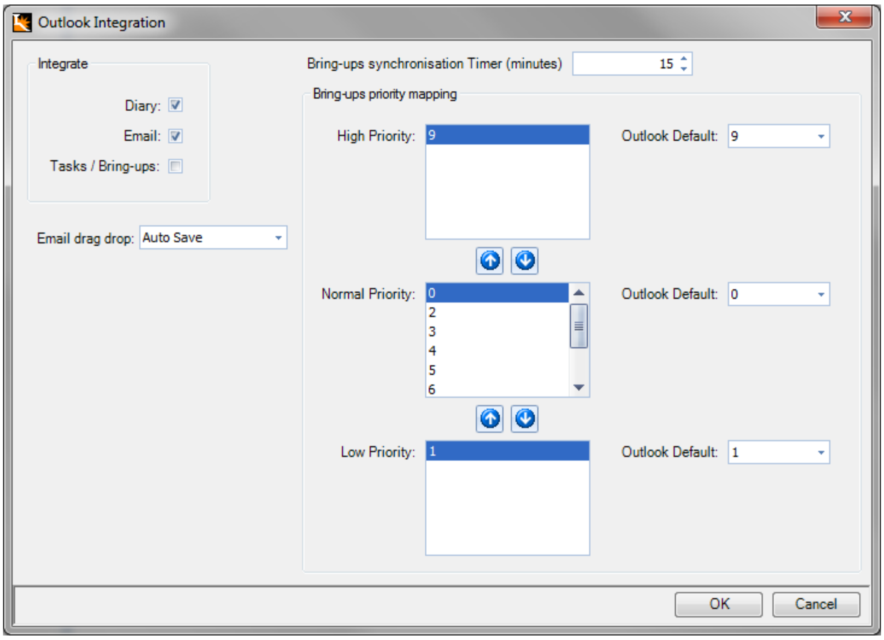
Email Drag Drop

The following options are available:

- Floating file note allows the user to access the floating file note functionality when dragging email(s) from Microsoft Outlook into LawMaster.

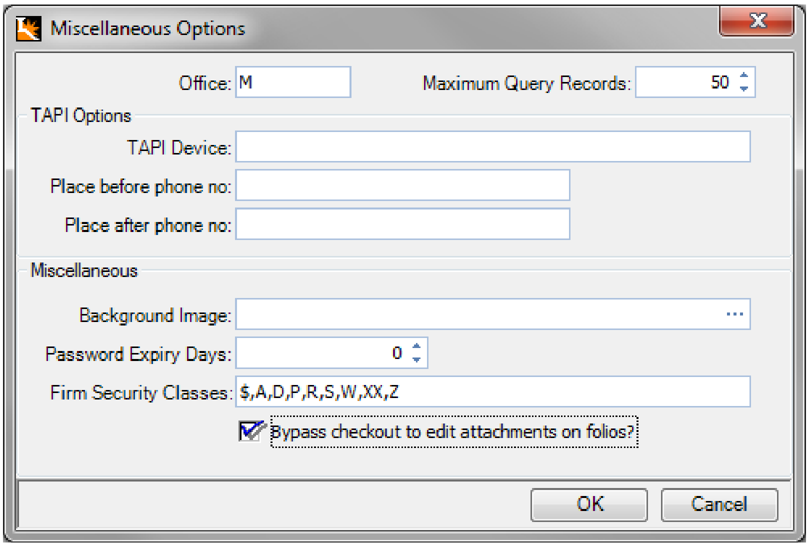
- Auto Save allows the user to save email(s) immediately to the appropriate file.

- Precis Override provides the user with a screen to override the precis of the email(s) they have drag-dropped from Outlook. The floating File Note screen is presented, but will only contain the precis field to be updated.



Processing Options

The following miscellaneous parameters may be defined via these processing options:



- Office – Office for this database. This code is appended to entity identifiers generated by the system so that identifiers are unique in a multiple database environment. This is usually an Office Location code (Resource Parameters) but another code can be used.

- Maximum Query Records – The maximum number of records displayed. Suggest this be set to 200.

TAPI Options

- ❖ TAPI Device – This is required to set up LawMaster to support dialing of telephone from within LawMaster. The name of TAPI device should be entered here.

- ❖ Place before phone no – Most PABX's require you to dial a '0' or a '9' to select an outside line. (<<MatterNo>> can be added to include the matter number) e.g. *60#<<MatterNo>>#0

- ❖ Place after phone no – This field will add the entered characters after the phone number. (<<MatterNo>> can be added to include the matter number)

Miscellaneous

- Background Image – This field holds the file path to an image (e.g. the firm's Logo) and the image will then be displayed on the main Lawyer's Workbench screen (see below). A look up facility is provided to locate the correct file path of the desired image.

- Password Expiry Days – Enter the number of days which must elapse before a user must change their password.

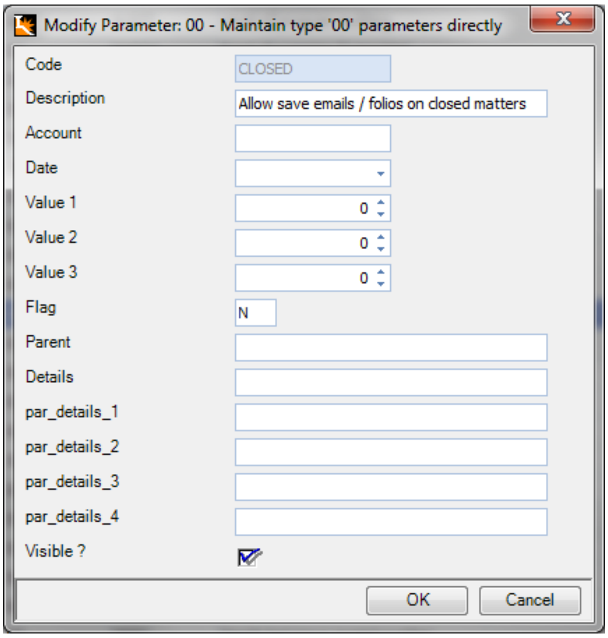
- Security List – Enter a list of Information Classes for the firm. Information classes may be one or two characters and must be separated by a comma e.g. A,B,CD,F,G. The Information Classes specified in this list will then appear under the Information Classes tab when setting up security for users via Menubar ➔ Security ➔ Maintain User Security.

- Bypass checkout to edit attachments on folios? – When this box is ticked users will be able to edit attachments of Checked Out folios. If not ticked, users must Check In folios before editing.

00' Parameters

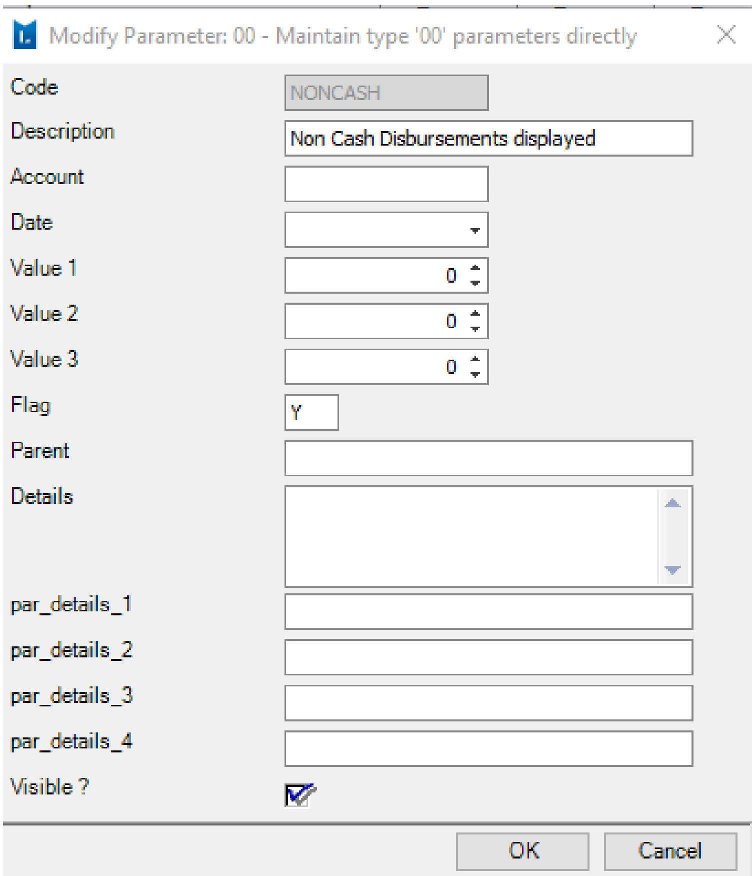
CLOSED

Once a matter has been closed a user is unable to create a folio on the Matter if the 'Closed' Parameter is set to N. The write, fax, email, email alternate, and SMS context menu entries are disabled in the Matter Contacts tab and the equivalent toolbar buttons are not shown. The same rule has also been applied to the merge context menu option in the Matter Templates tab.



NONCASH

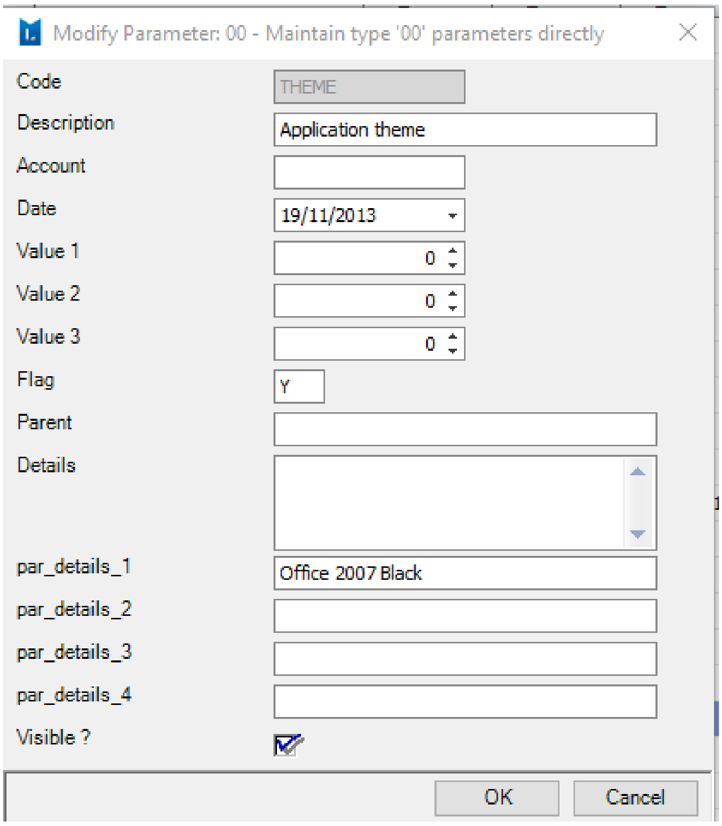
If non-cash disbursements are to be shown on a matter bill and you are using Table 10 – Non-cash Disbursement Summary this parameter needs to be set up as follows:



THEME

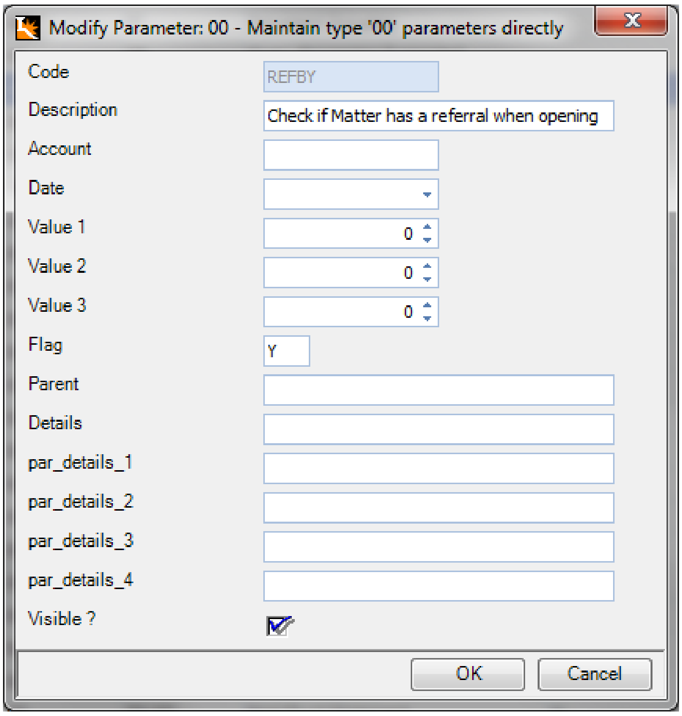
If you want to change the Application Theme for LawMaster you can change the Application Theme appropriately from the available list (refer to Application Them in Help).

- Caramel;
- Money Twins;
- Lilian;
- The Asphalt World;
- iMaginary;
- Black;
- Blue;
- Office 2007 Blue;
- Office 2007 Black;
- Office 2007 Silver;
- Coffee;
- Liquid Sky;
- London Liquid Sky;
- Glass Oceans;
- Xmas 2007 Blue;
- Valentine



REFBY

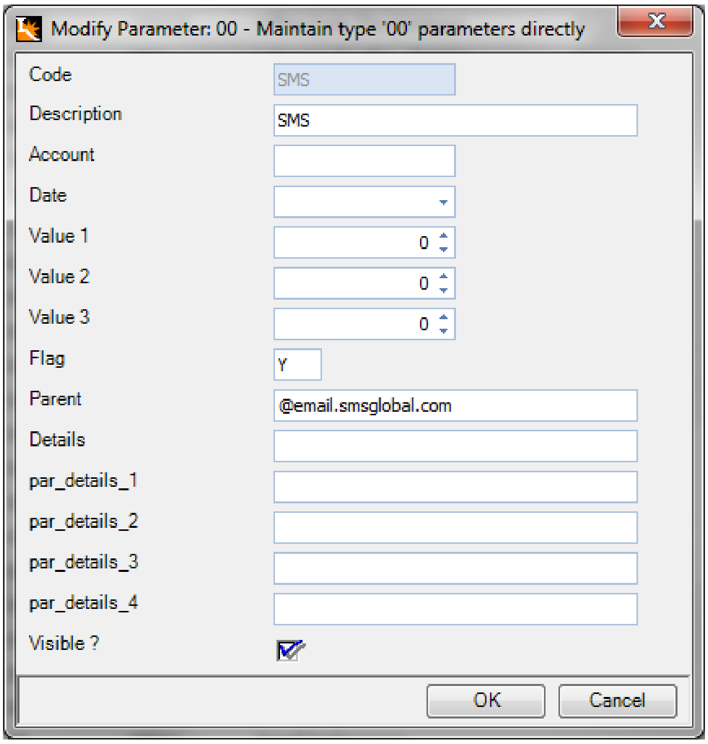
Used to ensure that Referral details are captured when a matter is opened. Matter & Client Processing Options - Check Matter has a Referral - ticked. If REFBY parameter Flag is set to 'Y' users are prompted to complete Referral information based on RC – Campaign codes.



SMS

LawMaster enables the sending process of an SMS to operate seamlessly by storing the URL of the service provider in the 00 – SMS Parameter (field par_parent). Note: The URL is prefixed by '@'.

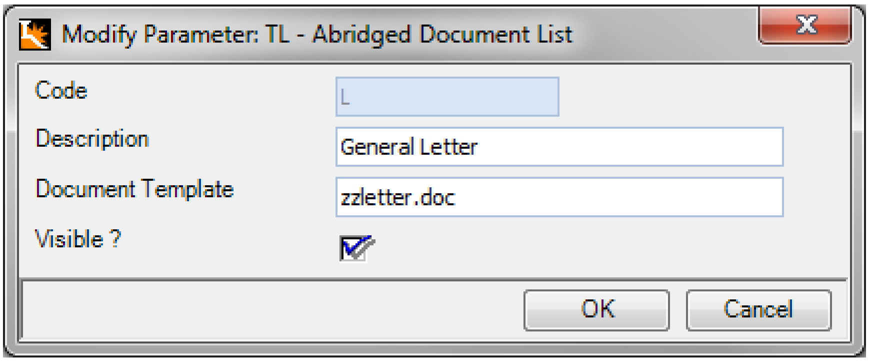
The entity to be called must have at least one mobile phone number and accept SMS using the Preferred SMS field in the Entity details screen. Further information regarding the setup and use of SMS is available from the User Guidelines help file.



Records Management

Abridged Document List

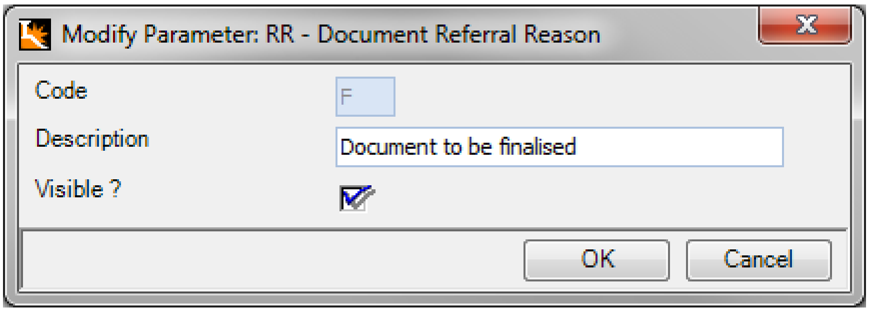
This parameter allows the firm to define the most commonly selected document templates when saving or searching documents.



Document Referral Reasons

This parameter allows the firm to set the referral reasons when referring document to another resource.

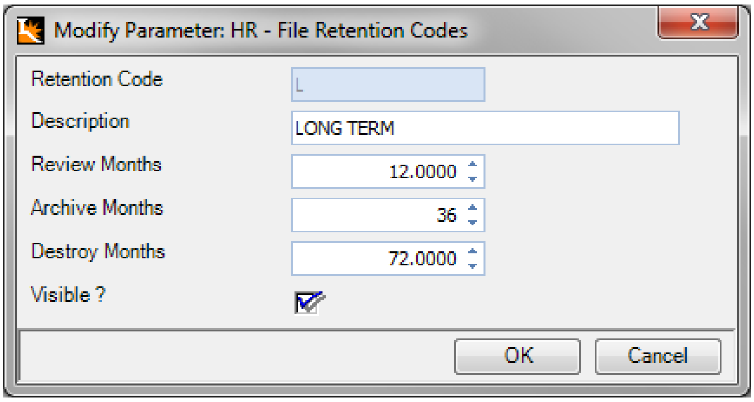
Suggest setting A, B C, etc. for reasons a document is being Referred To a user and set 1, 2, 3, etc for reasons document is being referred back to original Referrer.



File Retention Codes

The following fields must be completed to successfully set this parameter:

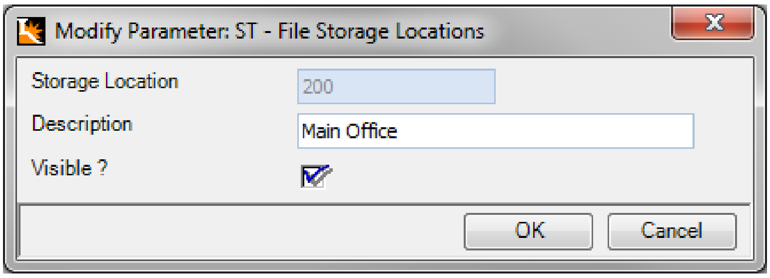
- Retention Code – Four character code to uniquely identify this parameter.
- Description – Full description of the code entered.
- Review Months – Number of months before reviewed after close of file.
- Archive Months – Number of months before archiving after close of file.
- Destroy Months – Number of months before destroying after close of file.



File Storage Locations

The following fields must be completed to successfully set this parameter:

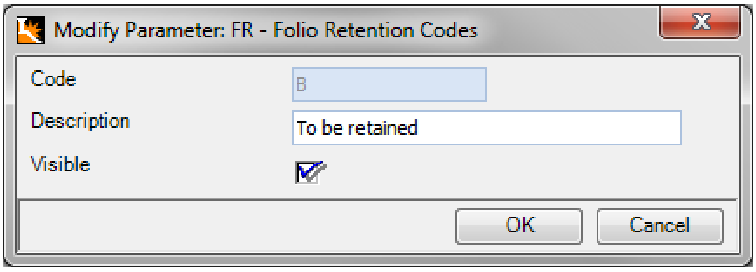
- Storage Location – Four character code to uniquely identify code.
- Description – Full description of the file storage location (e.g. Main Office; Central Records; Offsite Storage).



Folio Retention Codes

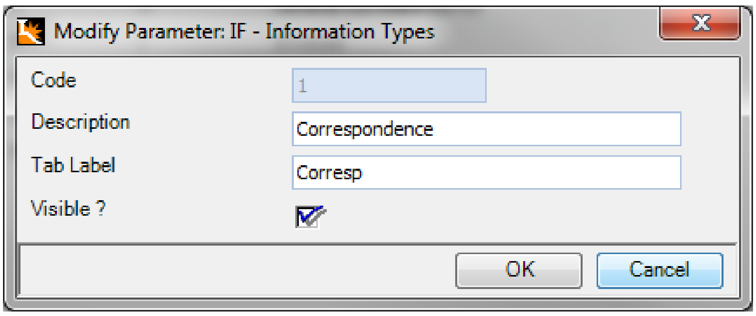
Folio Retention Codes are used to set the retention status of folios for use within Mailroom Processing. Refer Parameters ➔ Set Parameters ➔ Records Management. The following options are available:

- U - Unknown - default value for all existing and new folios
- B - To be retained - set in inwards correspondence
- A - To be destroyed - set in inwards correspondence
- R - Retained - set in folio edit
- D - Destroyed- set in folio edit



Information Types

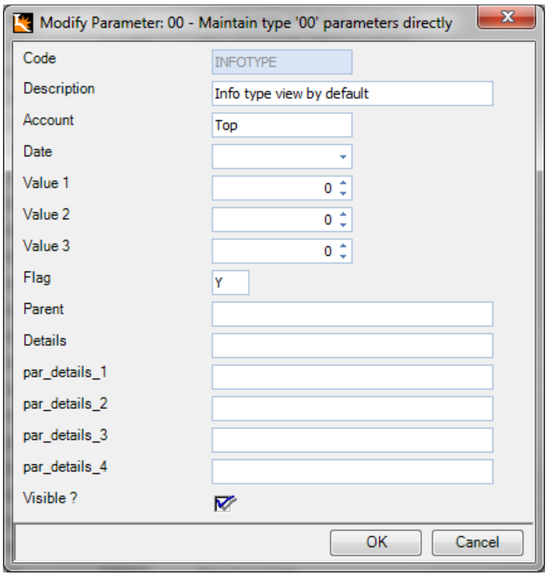
Information Types for Folio records are supported by way of Parameter Type 'IF'. These are used to further classify/group folio records.



A global option to display, as a firm-wide setting, the Information Types as tabs in Folios has been added.

Parameter 00-INFOTYPE with the Flag set to 'Y' will turn this feature on. The position of the tabs may be set via the Account field using the following values, Bottom, Top, Left, or Right. All folios that have a blank Information type will be displayed in the "Other" tab.

A user may remove the Information Type Tabs by way of the Folios Enquiry Context Menu option – View – and unticking the Info Type Tabs option.



Resource

Resource Type

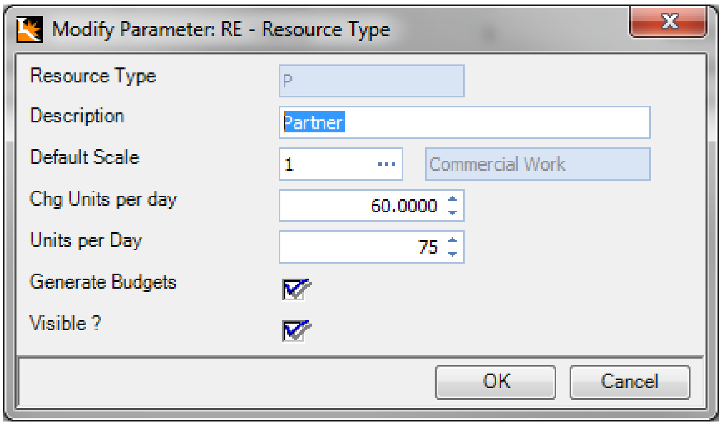
Used for charging purposes and relate to resource charge rates. Includes override values for charging scale, chargeable units per day and total units worked per day. Fields required for completion include:*

- ❖ Resource Type – Up to a 2 character code to define the type of resource
- ❖ e.g. S – Solicitor, P – Partner
- ❖ Description – Full description of the resource type e.g. Solicitor
- ❖ Default Scale – This is the default scale (as defined by Entity/Matter Scale Types) to use for the purposes of assigning a charge out rate for resources of this type for budgeting purposes.

- Charge Units per day – Target number of units worked per day on legal work. This is also viewed in the Daily Summary tab of the Lawyers Workbench unless the Resource has a Budget and the 00-RESRPT Parameter has been created.

- Units per Day – Units worked per day. The default is 80.

- Generate Budgets – Tick to auto generate resource budgets for new resources and terminated resources.



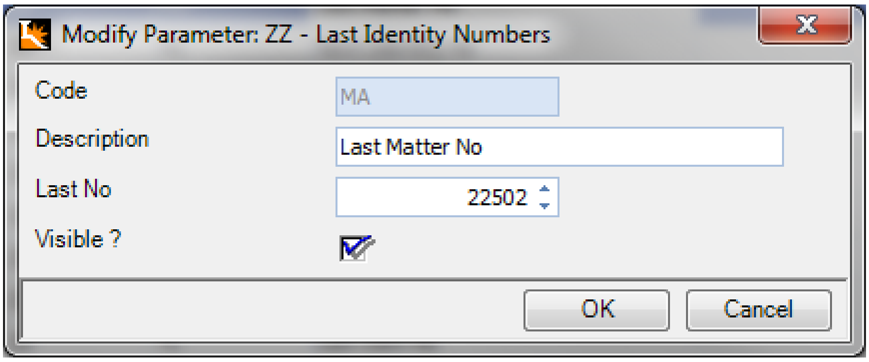
System Sequences

Last Identity Numbers

Last Identity Numbers are used for holding the last value assigned to table system sequences such as Folio No. The system maintains unique identifiers for a number of tables. These identifiers include matter numbers, voucher numbers etc. The identifiers are held as parameters of type 'ZZ' and code as specified below. These values must be set when the system is first implemented.

The client application is responsible for allocating these numbers prior to the associated record being INSERTED to the database.

Each calendar year, if you wish to change the numbering of your matters, you select the Last Matter No. parameter and modify accordingly.



WP, Mail Help & Printing

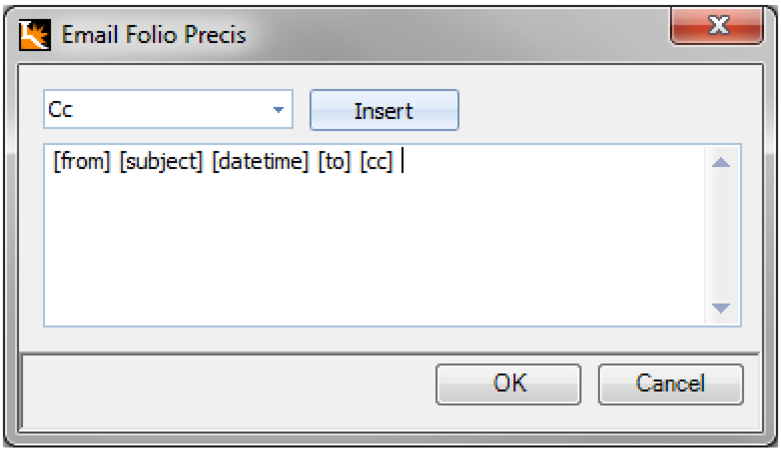
Email Folio Precis

A firm wide setting for the précis of an email folio can be set. This parameter provides the ability to configure the default email folio précis in all scenarios where LawMaster saves an email as a folio record (send, drag-drop, floating file note).

This provides template variables as follows:

- From – The name of the sender
- To – The name of the recipient(s)
- CC – The name of the CC recipient(s)
- BCC – The name of the BCC recipient(s)
- Direction – The direction of the message (sent/received)
- Subject – Subject of the email
- Date time – Date the email was transferred, displayed in the following format (17/09/2010 at 3:29pm)

The variable names are to be enclosed in square brackets when used.



Email Signature – Firm

LawMaster supports the definition of a three tier signage clause which may be attached to emails generated by LawMaster. The clause is defined by the existence of parameter 00 - SIGN from Miscellaneous ➔ Maintain Type '00' Parameters Directly. The text of the signature clause is maintained at the Firm Wide (default), Work Unit or Resource (overrides) levels.

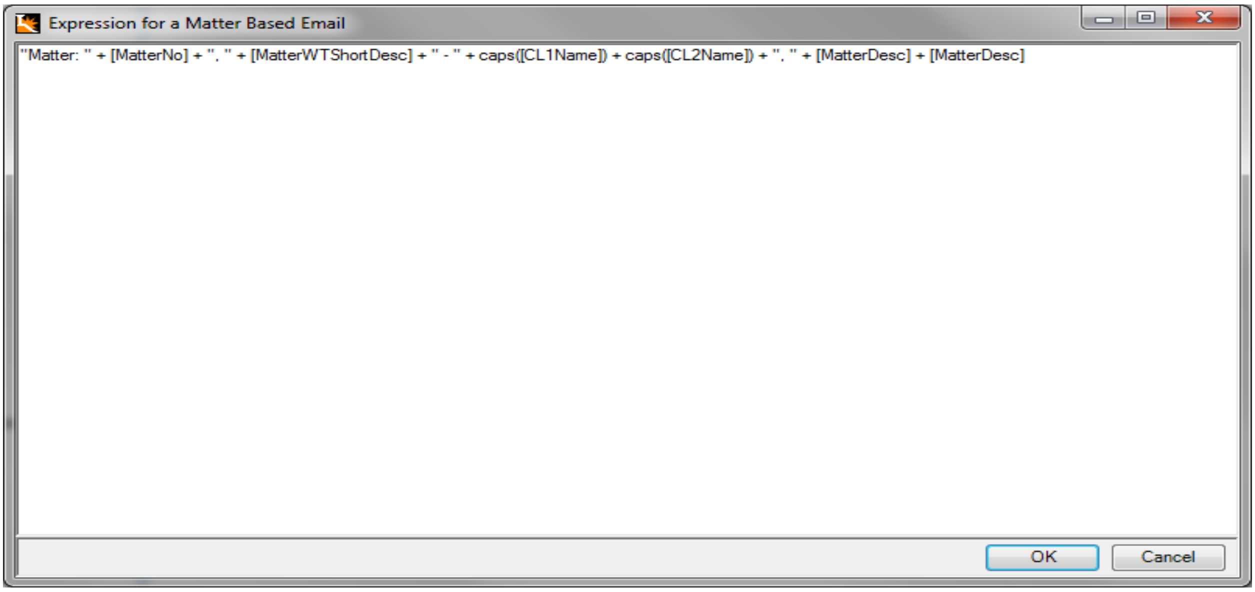
When sending an email, the system will first check for the existence of a resource signature, and attach the resource signature if it exists. If not, the work unit on the matter, and attach the work unit signature if it exists. In the event of no work unit signature for the matter, the system will then look for the work unit on the resource. In the event of no work unit signature set for the resource work unit, then the system will use the firm email signature.

The Firm-Wide email signature may be set up via Parameters ➔ Set Parameters ➔ WP, Mail, Help & Printing ➔ Email Signature - Firm.

Email Subject Matter

A firm wide setting for a Matter Based Email Subject line is now set via WP, Mail, Help & Printing ➔ Email Subject - Matter. The default value is: "Matter: " + [MatterNo] + ", " + [MatterWTShortDesc] + " - " + caps([CL1Name]) + ", " + [MatterDesc] + "."

E.g. Matter: 22438, Guarantee - COLIN ADAMSIN, Adamson Guarantee.



Additional Information

Dump and Load Parameters

The system provides the facility to Dump and Load parameters from one database to another, as an xml file, using the context menu within the Parameters module.

The user needs to be aware that if a parameter already exists when using the Load facility in the context menu, it has the side-effect of deleting the original parameter and anything that hangs off the parameter (i.e. the children/associated parameters).

For example, in the case of the OC Parameter – Work Units – Non Accounting, the BI, DB and DC parameters for the associated office code will also be removed, these are displayed in the Work Units – Accounting Parameter screen. We advise that you make a screen dump of the Work Units – Accounting parameter before doing a load, and then re-enter the appropriate General Ledger Accounts. Alternatively, dump and load the associated BI, DB and DC parameters as well.

We suggest you contact LawMaster if you are unsure of any associated Parameters that may be affected by the Dump/Load procedures.

Mark Parameters as Not Visible

An option has been added to various Parameter groups that allows the user to indicate if a selection list has options that are to be hidden from users in a look up.

Where a Parameter is marked as Not Visible i.e. the Visible check box is unticked, the given parameter code is removed from all lookups.