



Lexis Affinity Library

Version 3.5

Essentials Workbook

Prepared for Release Documentation

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Notes

1. Lexis Affinity Library Essentials

This course is designed for system administrators, WP supervisors, accounts supervisors and Lexis Affinity operators who need to understand the day-to-day functions of the Lexis Affinity Library database.

The Essentials course introduces the attendee to Lexis Affinity Library, and its daily administration procedures.

The course is designed as an introductory level course for staff who are new to the use of the Lexis Affinity Library software in a law office.

Topics covered in this course include:

- Customising the Lexis Affinity desktop
- PhoneBook entries
- Clients and matters
- Creating WP export files of PhoneBook entries and clients.
- Using filters

Notes

2. The Structure of Lexis Affinity Library

Lexis Affinity Library offers a complete and integrated approach to Law Office Management.

The Lexis Affinity Library system uses a set of related tables to maintain a complete picture of your practice. These tables are just like a set of card files in which information is recorded in an orderly fashion. Understanding the tables behind Lexis Affinity Library will help you use the system in a more powerful way to accomplish your goals.

PhoneBook

This is the core of Lexis Affinity Library. The PhoneBook should contain the names and addresses of all the people or companies with whom your firm deals. This includes Clients, Employees, Prospects, Debtors and other parties such as; Other Solicitors, Real Estate agents, Barristers, Doctors, and Creditors. The integrity of the data in the PhoneBook is vital to your practice. The PhoneBook also allows you to record relationships between people or companies in the PhoneBook, such as associated companies, employee relationships and Directorships.

The PhoneBook is also your marketing database and therefore can include potential clients or anyone who you want included in your marketing mail outs. The PhoneBook includes the ability to create mail merge documents for all or selected contacts in the PhoneBook.

Clients

Clients are a sub-set of the PhoneBook. Client information is stored in two places (referred to as Tables) in Lexis Affinity Library. Client names and addresses are stored in the PhoneBook and client account balances are stored in the Client record. Although all of the client information can actually be entered in the Client record (so that it is easy to create a new client entry in one place), the name and address details are stored in, and can be accessed through, the central PhoneBook.

This makes it easy for staff to look up any name and address in the PhoneBook, regardless of whether they are looking for a client's telephone number or that of another party.

Matters

Once a client has been created in the system, you are able to create matters for the client. Attributes of the matter, such as the Partner, the Controller and the Author and the matter type are all defined in separate files (or tables).

The matter file records information such as matter number, description of the matter and links to other parties. Other party details are kept in the PhoneBook with all other names and addresses. In addition, the matter file records the various ledger balances such as Fees, Debtors, Billed Fees and Trust.

Other associated variables can be recorded for matters of a particular type. For example - the exchange date for a conveyancing matter or the date of marriage for a family law matter.

SafeCustody

Details of Packets held and the contents of those packets (Packet Items) are recorded and can be accessed by Client or Matter. Lexis Affinity Library also records details of the Date Lodged, Location, Borrower, Date Borrowed and date due for Return, Returned Date, Review Date, and Release to details.

Transactions

Transactions include fee entries, cheques, receipts, bills and journals. They are posted to matters and General Ledger Accounts immediately. Matter, Client and GL Account balances are automatically updated and are therefore always up to date.

Diary

Diary includes the details of appointments, reminders and telephone messages..

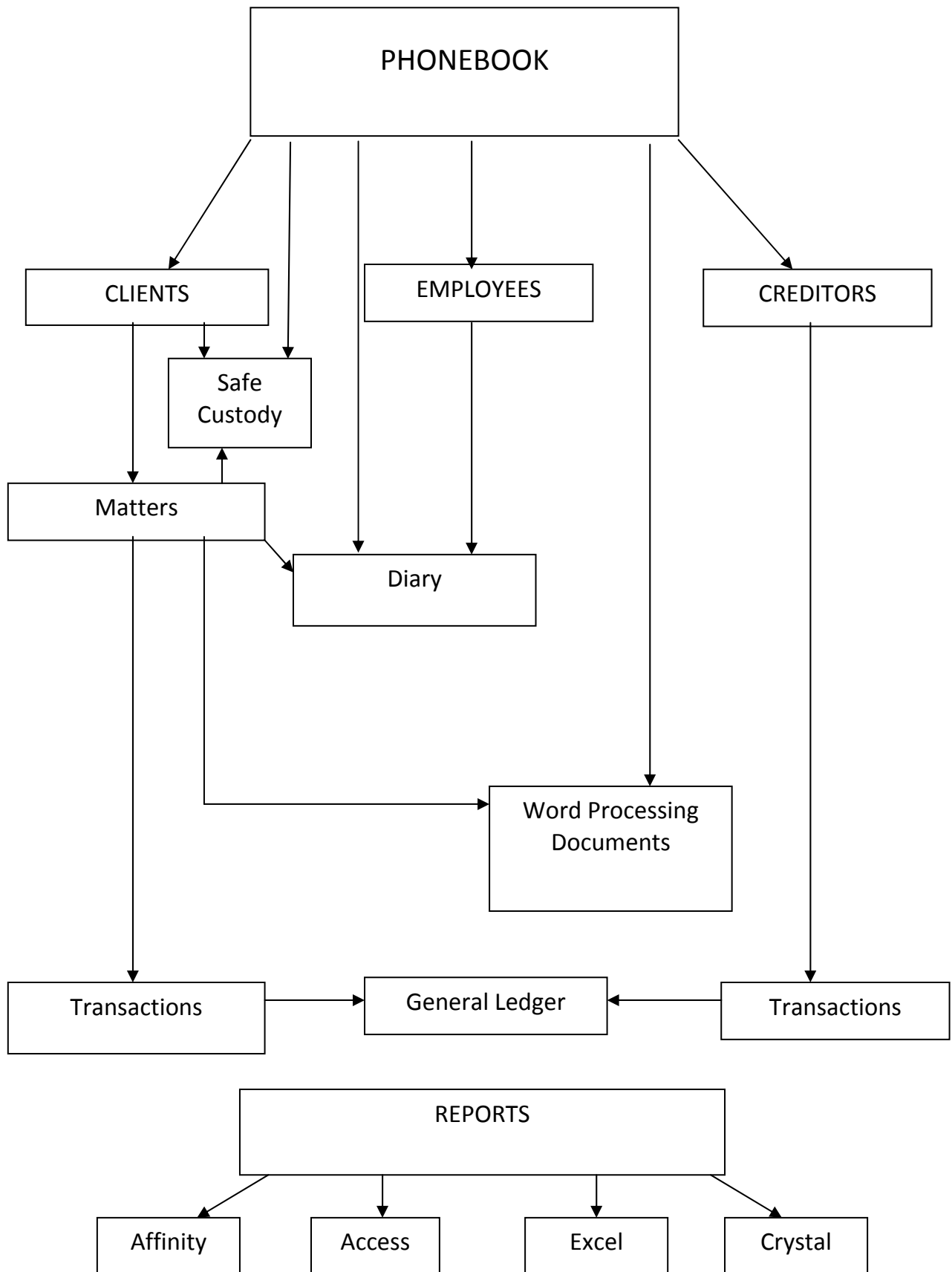
Documents

Details of documents recorded against this matter.

Reporting

Lexis Affinity Library comes with an extensive range of reports. Prior to Version 3, reports were available in QuickReport format. From Version 3 onwards, some Lexis Affinity reports are available in DevExpress format, which allows users to copy and modify Lexis Affinity reports and to create their own reports (subject to a licence agreement). You can also create your own reports by using third party products such as Excel, Access and Crystal Reports.

The general structure of Lexis Affinity Library is shown in the following diagram.



Notes

3. Lexis Affinity Library Desktop

Access to Lexis Affinity Library is by double-clicking on the Lexis Affinity Library icon on your Windows Desktop and signing in as a User.

The Lexis Affinity Library Desktop will display and you can select individual applications by double clicking on the relevant icon.

The icons that appear on the Desktop will vary from User to User. This reduces the number of icons that appear on most Desktops and makes Lexis Affinity Library easy to navigate.

The applications available to a User are determined by the Lexis Affinity Library Administrator.

3.1 Sign into Lexis Affinity Library



Hands on

In this exercise you will sign into Lexis Affinity Library as YSR (Password is YSR). YSR has the highest level of Security and access to all applications, to ensure all relevant aspects of Lexis Affinity Library can be used during the training.

In your office, there is usually only one person (the Lexis Affinity Library Administrator) who has access to every application.

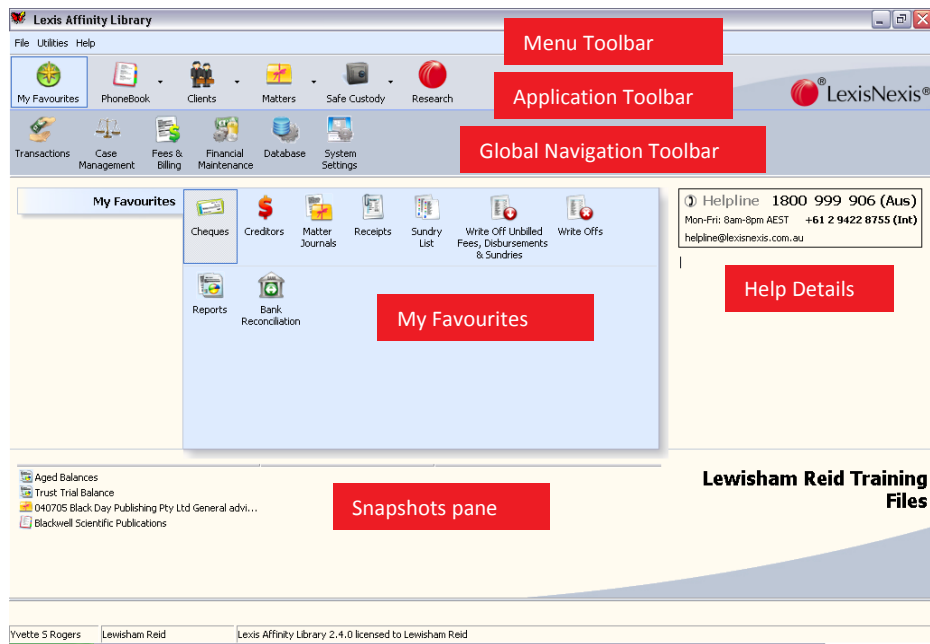
1. Double Click the Lexis Affinity Library icon

The Lexis Affinity Library Sign-In screen will display:



2. *User ID* YSR
3. *Password* YSR (The password is not case sensitive.)
4. *Database* Select the appropriate Database
5. Click on **[OK]**
OR
Press <ENTER>

The Lexis Affinity Library Desktop appears.



Menu Toolbar

This group of functions is common to all Lexis Affinity Library users.

File

Select Exit, Lock, Set Date, or Check for Task Reminders.

Utilities

Select User Options, Password Change, Postcode Search or QuickCodes.

Help

Select Help to go to Lexis Affinity Help, the LexisCare Home Page, emPower Precedent Update Site, run a System Check (if enabled), log a Helpline Call, display the Version & Build number, the number of licensed users and the number of used licences and the oracle version details.

Application Toolbar

This gives access to PhoneBook, Clients & Matters and Safe Custody and Research (if licensed).

Global Navigation Toolbar

These are the main headings of the various groups of functions of Lexis Affinity Library. Each functional group opens to display further sub groups. Individual functions can be accessed by a double click.

My Favourites

This is user definable to allow quick access to the most often used functions.

Help Details The details displayed here are either the standard LexisNexis Helpline details or can be customised for your individual firm. (Select System | General.)

Snapshots pane

This is a user definable area. Users can "snapshot" a particular PhoneBook entry, Client, Matter or Report. They are accessed by a double click.

3.2 My Favourites

It is possible to place short cuts to frequently used functions in 'My favourites'.



Hands on

In this exercise you will add three functions to My Favourites.

1. Open Transactions | Cheques | Cheque Requisitions
2. Right click on the Cheque Requisitions icon and select *Add to My Favourites*
3. Repeat this for Fees & Billing | Fees | Fee Sheet and Fee List
4. Open My Favourites to display the icons

Open applications from My Favourites



Hands on

In this exercise you will open each application. You can have more than one application open and minimised at the same time.

1. Open each application and minimize each one
The application names will display on the Taskbar at the bottom of the screen.
2. Click on the application button in the Taskbar to maximise each application

Close Applications



Hands on

In this exercise you will close each application.

3. When each application is maximized, close each one

There are several ways to close a screen:

- Click on the X in the top right hand corner
- <ALT + F4>
- Click on the icon in the top left hand corner and click on Close

Some screens may have "File" as an option on the Menu Bar.

In this case, you can:

- File | Exit
- <ALT +F> X


3.3 Create Snapshots

Direct links to PhoneBook entries, particular clients and matters, and reports, can be placed on the Snapshots pane.



Hands on

In this exercise you will create a snapshot for a matter, a client and a PhoneBook entry.

1. Select *Matters* from the Applications Toolbar to display the Matter Selection screen.
2. Double-click on the first matter to display the details for that matter.
3. Click on the Snapshot button. 

OR

Select File | Snapshot

The selected matter will now be in the Snapshots pane.

4. Close the Matter screen
In this case you can use File | Exit or <ALT + F> X
5. Select *Clients* from the Application toolbar
6. Open the first Client
7. Snapshot this Client
8. Close the Client screen
9. Select *PhoneBook* from the Application toolbar
10. Locate and open Antwell Building Company
11. Snapshot this PhoneBook entry
12. Close the PhoneBook screen

You will see three icons in the shortcut pane. Notice that each icon is different. These icons are the same as the icons on the Application toolbar.

13. Open the Matter from the Snapshot
14. Open the Client from the Snapshot
15. Open the PhoneBook entry from the Snapshot
16. Close each window

3.4 Deleting Shortcuts from My Favourites



Hands on

1. Open My Favourites
2. Right click on the Cheque Requisitions icon and select Delete

The icon will then be removed from My Favourites.

NOTE: You can use the same procedure to delete Snapshots.

3.5 Automatically run Functions after Sign-In

It is possible to have certain functions automatically open when you sign into Lexis Affinity Library.



Hands on

In this exercise you will flag the Fee Sheet to be opened after signing in.

1. Right click Fee Sheet in My Favourites
2. Select Run after Sign-In
3. Sign out of Lexis Affinity Library
4. Sign into Lexis Affinity Library using the same User and Password as before

You will see the Fee Sheet opened and both windows are available for access.

5. Close the Fee Sheet

To remove functions from “Run after Sign-In”

6. Right click the Fee Sheet icon and remove the tick

3.6 Lock and Unlock Lexis Affinity Library

You can lock Lexis Affinity Library if you need to leave your desk when you are part way through a function.

Lock Lexis Affinity Library



Hands on

1. Open Matter 012402

If the Matter screen is maximised, you will need to click on the “Minimise” button on the Toolbar so that you can see the Application Toolbar.

2. On the Menu Toolbar, select File | Lock

This will lock the Lexis Affinity Library application and display a dialog box as shown below:



3. Unlock Lexis Affinity Library by entering the Password.
(The same as when you signed in)
4. Maximise the Matter screen by clicking on the matter icon on the Taskbar (at the bottom of the screen)
5. Close the Matter screen

3.7 Lexis Affinity Library Help

The Help button on the Menu Toolbar gives you access to the following:

Lexis Affinity Help

Launches the Help functions for Lexis Affinity. This provides access to a summary page of “What’s New”, the Enhancement Notice for the current version of Lexis Affinity and access to the Essentials, Operations and Administrator Workbooks. The “User Reference” selection provides access to DataForms and Precedents, Workflow, Scripting,, Investments and Safe Custody Reference material and End of Financial Year Instructions.

LexisCare Home Page

Launches the LexisCare home page

emPower Precedent Update Site

System Check

Launches the System Check program.

Log a Helpline call

Launches the LexisCare Service Centre web site.

About

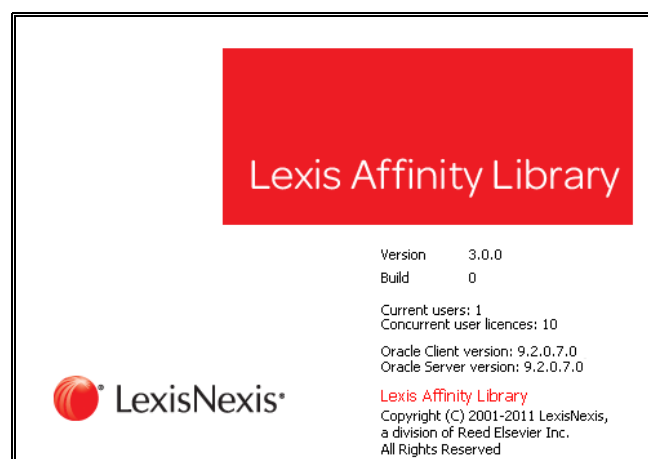
Displays information about:

The Version and Build number of the software.

The Current users - ie the number of users in the system.

Concurrent user licences – ie the maximum number of users allowed in the system at any one time.

The Oracle versions.



3.8 Using Lexis Affinity Help Functions

You can access Lexis Affinity Help via Help | Lexis Affinity Help on the Affinity main menu, or by pressing **[F1]** from most functions within Lexis Affinity.

The Summary page “What’s New” will be opened.



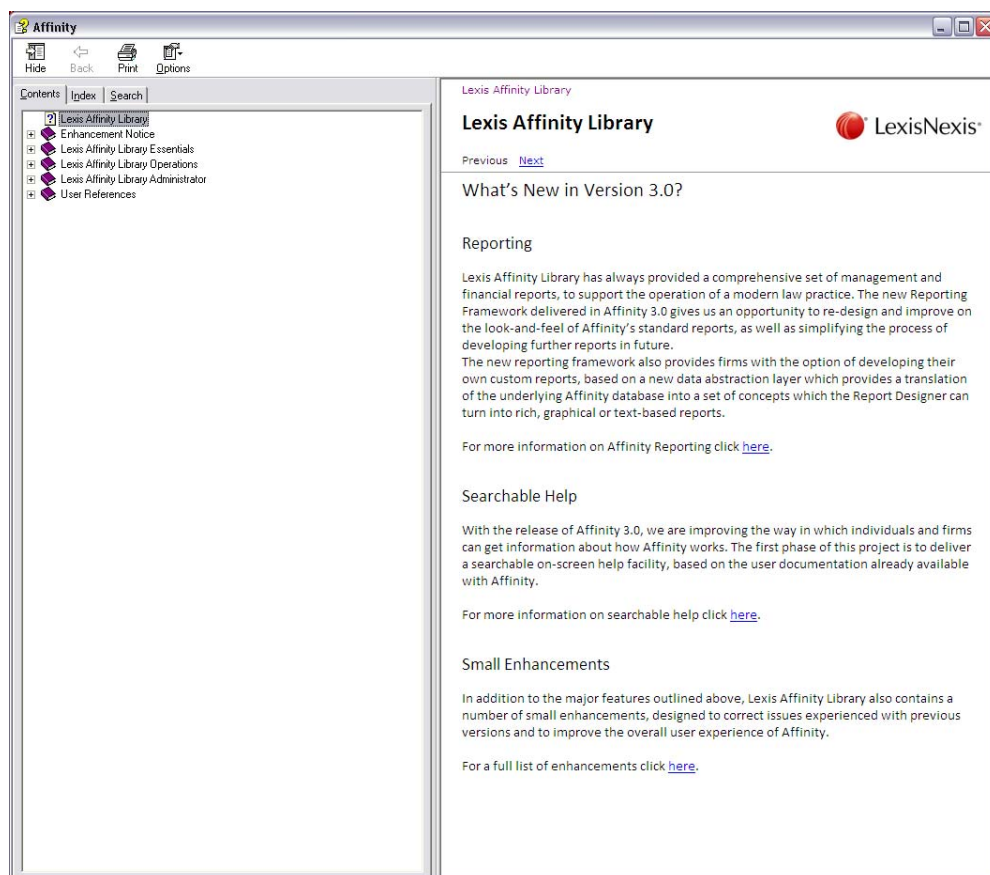
Hands on

In this exercise you will access the Help function and explore some of the information contained within.

1. On the Affinity Desktop select Help and select Lexis Affinity Help
OR
Press **[F1]**

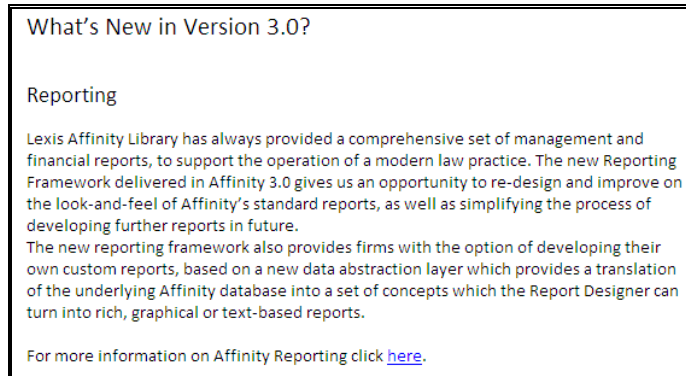
The Summary page of “What’s New” will be displayed.

In Version 3.0 the screen will look similar to:



This screen will list the major features of the Version and will provide hyperlinks to the information about those features.

For example:



2. Click on [here](#)

Another menu displays providing access to information on the new reporting features.

3. Click on **[Back]** at the top left of the screen

“Contents” tab

From here you can open each section- for example the Enhancement Notice for the current Version of software. You can click on **+** to open each Chapter heading and see the topics included in each chapter.

“Index” tab

This will display all the “headings” from the source documents.

“Search” tab

This tab provides access to the search capabilities in Lexis Affinity help.

3.8.1 Full Text Searching within Lexis Affinity Help



Hands on

In this exercise you will use the Search functions to locate various pieces of information.

1. Select the “Search” tab
2. In the “Search” field type ‘Fee’ and click on **[List Topics]** or press **[Enter]**

The left hand side of the screen will now contain a list of the topic titles where the word “Fee” is used.

3. Click on **[Display]**

The right hand side of the screen now displays the selected page of information and the word ‘Fee’ will be highlighted.

The following table shows you how to refine the search options to reduce the list of results.

Example	Result
fee	Will return all topics containing the word “fee”.
fee sheet	Will return all topics containing either of the words “fee” and “sheet”.
“fee sheet”	Will return topics containing the phrase “fee sheet”. ie Use quotes around the search text to search for phrases.
fee*	Will return all topics containing the word “fee” and words that start with “fee” (for example: feeling, feeble etc). You can also use wildcards at the beginning of the search text.
fee OR sheet	Will return all topics containing the words “fee” or “sheet”.
fee NOT list	Will return topics which contain the word “fee” but not the word “list”.
fee NEAR sheet	“NEAR” is used to find words which aren’t necessarily together but are near each other.

NOTE: searching Help files is not case sensitive. (you do not need to type ‘or’, ‘not’ or ‘near’ in upper case.)

3.8.2 Search Options

The Search options appear at the bottom of the “Search” tab.

- **Search previous results:** Allows you to refine your search even further by only searching the topics returned by your previous search.
- **Match similar words:** This finds all occurrences of the given word with common suffixes. For example, “run” will return “running” and “runner” but not “runtime”.
- **Search titles only:** This searches only the topic titles and not the text within each topic.

3.9 Accessing Recently Used Records

The down arrows beside *PhoneBook*, *Clients*, *Matters* and *Safe Custody* on the Application Toolbar gives you a quick way to access the last PhoneBook, Client, Matter or Safe Custody Packet opened. The number of entries that appear in this list is set in the Employee record.



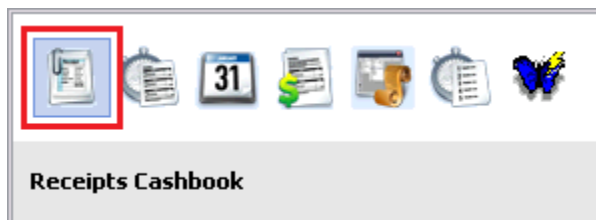
Hands on

1. Click on the PhoneBook down arrow to see the latest PhoneBook entries accessed.
2. Click on one of the PhoneBook entries in the drop-down list to open the PhoneBook with that record displayed
3. Close the PhoneBook screen

3.10 Switching between programs

You can switch between programs on the Affinity desktop. Use CTRL+TAB to move through the list of open programs in Affinity. Use CTRL+SHIFT+TAB to move backwards in the open list of programs.

When you press CTRL+TAB, the Affinity desktop dialog box appears with the caption of the selected icon. The icons represent the relevant program opened on the Affinity desktop.



3.10.1 Order of icon

The icons within the dialog box are in the order of the last active program, where the current window appears first, followed by the next most recent window. For example, if Receipts Cashbook is the last active program you accessed, then the dialog will display Receipts Cashbook first in the open list of programs. Once you select a program from the dialog box, the selected program will be the first to appear in the list next time you press CTRL+TAB.

3.10.2 View Affinity desktop

One of the icons is the Affinity desktop, identified by the blue butterfly. If you select this icon, then all the currently opened programs within Affinity are minimised and the Affinity desktop is displayed.

Notes

4. Toolbars

A number of Toolbar options are standard across the system. Some of these are shown below and are referred to throughout this workbook.

The icon or picture appears on the Toolbar. When you rest the cursor on the icon an explanation or description of that icon will display.

If an icon is not required or relevant for the function currently being performed, it will be greyed out.



New Creates a new entry, such as a new PhoneBook Group. This icon changes from Application to Application.



Reverse Allows you to reverse the selected entry.



Delete Deletes the entry currently displayed.



Create a Merge File for Word Processing
Links to Microsoft Word to create or edit a document based on a selected document or precedent.
If WordPerfect is used then the WordPerfect icon appears where the links to word processing is enabled.



Find Displays a list of names from which a particular record can be selected.



Snapshot Creates a Snapshot for a particular Client, Matter Report etc on the Desktop.



Help Displays the On Line Help.



Next Go to the next record in the current sequence.



Previous Go to the previous record in the current sequence.



First Go to the first record in the current sequence.



Last Go to the last record in the current sequence.



Print Print a report, the current record or a list.
Most reports will be displayed on the screen first and can then be printed or saved to a file.



Refresh Immediately refreshes the data on the screen.



Clear Clears the filter and refreshes the screen.

Notes

5. QuickCodes

QuickCodes enable the user to enter text in to Lexis Affinity Library with minimal effort. For example, one of the most common reasons for issuing a Trust Receipt is “On account of costs & disbursements”. Rather than type this description every time, Lexis Affinity Library QuickCodes allows the text to be entered once and used many times over. This not only saves typing but also standardises the way text is typed.


Once a QuickCode has been created it can be used in most Lexis Affinity Library applications – for example when creating cheques, receipts, fees, journals etc. More than one QuickCode can be used to insert the detailed description for an entry if multiple lines are required.

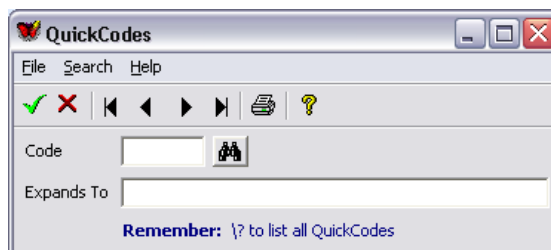
5.1 Create a QuickCode




HANDS ON

In this exercise you will create a new QuickCode. The example given is that of SM (Settlement Money), however you may choose to create your name using your initials as the Code.

1. Open QuickCodes (Utilities | QuickCodes)
2. Click on  to create a new code. The screen is displayed below:



3. *Code* SM
4. *Expands To* Settlement Money
5. Click on  to update.

A QuickCode can have a maximum of 5 characters.

QuickCode Field Descriptions

Code the code that is typed to insert the text.
This is a maximum of five characters.

Expands To This is the description that Lexis Affinity Library will insert when the code is entered into a field. **240 characters**


5.2 Print QuickCodes

It is suggested that each User has a printed copy of the QuickCodes for ease of reference.



Hands on

In this exercise you will print the QuickCodes.

1. Click on  to see the list of QuickCodes.

A sample list of QuickCodes is shown below:

Printed 17/03/2009 8:44:05 AM		Lewisham Reid QuickCodes
Code	Description	
A	Attendance on telephone regarding	
AOD	Affidavit of Debt	
BC	Briefing Counsel	
CA	Court appearance	
CD	On account of costs & disbursements	
FF	Filing fee	
IF	Interpreters fee	
LM	lunch meeting	
LTO	Land Titles Office	
MR	Medical report	
OSR	Office of State Revenue	
PA	personal attendance	
POA	Payment of account	
SF	search fee	
SM	Settlement Money	
TA	Telephone attendance re Matter	
TI	Telephone call - incoming	
TO	Telephone call - outgoing	
WRT	with respect to	
YPF	your purchase from	

2. Close the Print Preview
3. Close QuickCodes

5.2.1 Using QuickCodes

To use QuickCodes throughout Lexis Affinity Library type the Code, preceded by a backward slash and followed by a space, for example, \dnrΔ to insert “Department of Natural Resources”.

Look Up List for QuickCodes

QuickCodes can be displayed on the screen (where QuickCodes are available) by typing \?.

6. PhoneBook

The PhoneBook is the central repository for the names and addresses of all the people and organisations with which your Firm does business or comes into contact. This includes clients, prospective clients, barristers, solicitors, agents, suppliers and Employees. The integrity of the data in the PhoneBook is vital to your practice.

Once entered, names and addresses can be accessed by any application within Lexis Affinity, and can be used to merge with Word Processing documents or link to emPower DataForms.

It is important to remember not to use characters such as inverted commas (") in fields that are likely to be included in an export as these are regarded as field delimiters.

You can access the PhoneBook Selection screen from;

- the Application Toolbar
- The PhoneBook icon 
- Clicking on the Find icon  on the PhoneBook toolbar
- Database on the Global Navigation toolbar (if enabled)

6.1 Searching for PhoneBook entries

It is recommended that you search the database before creating a new PhoneBook record, to ensure that the PhoneBook entry does not already exist.



Hands On

In this exercise you will search for a PhoneBook entry (Blackwell Scientific Publications).

1. Open PhoneBook from the Application Toolbar

You can search for PhoneBook entries in a number of ways

- Click on the Scrollbar on the right of the window to scroll up and down until you see the PhoneBook entry you want displayed.
- Type the first few characters of the name of the person or organisation. When you open the PhoneBook list, the cursor will normally be in the "Search starting with" or "Search contains" field in the bottom left corner of the window. (The prompt you see depends on the setting on the "Filter" tab.) As each letter is typed any matching entries are displayed.

- Use the filters to limit the number of PhoneBook entries displayed and select the required entry from there.
Using Filters will be covered in more detail later.

2. Select the “Filters” tab

The Filter screen displays as shown below:

The screenshot shows the 'PhoneBook Selection' window with the 'Filters' tab active. The interface is divided into several sections:

- Select where criteria:** Radio buttons for 'Contains' (selected) and 'Starts with'. Below are input fields for Search Key, Full Name, Contact, Address (containing '156'), Suburb/Locality, State, Country, DX Location, and Note.
- Address Type to display:** Radio buttons for 'Street', 'Postal', 'Registered' (selected), 'Mailing', and 'DX'.
- Relationship:** Two dropdown menus.
- Select Equal To:** Fields for Code, Type, State, Postcode, and Coll. Plan.
- Include:** A list of checkboxes for selection: Active PhoneBook, Active or Permanent Client, Non-Active Client (no matters), Non-Permanent Client, and Inactive PhoneBook. A 'Clear All' button is present.
- Include Groups:** A list of categories with checkboxes, including Accountant, Agent, Associated Party, Association Member, Auctioneer, Bank, Barrister, Body Corporate, Building & Construction, Christmas Card, Client, Council, Court, Creditor, Delegate, Do Not Mail, Doctor, Finance Company, Government Department, Insurance Agency, International, Investigator, Media, Mortgagee, National, Newsletter, Other Party, Our Staff, Partner acting, Pharmaceutical, Seminar, Small Business, Solicitor, Solicitor Firm, and Suppliers.
- Exclude Groups:** Tax Seminar, Valuer, Water Authority.
- Associated With:** A 'Refresh List' button.

At the bottom of the window, a status bar reads: '1 Record Filter = Address containing 156. Act Pbk. Act&Perm&Inact&Non-Perm Clts. Displaying Registered Address.'

3. Select where criteria Select Contains

4. Select the “PhoneBooks” tab

5. Search containing Blackw

If “Search where criteria” is set to Starts with, the PhoneBook selection screen will show “Search starting with”.

Several entries will display – including Blackwell Scientific Publications.

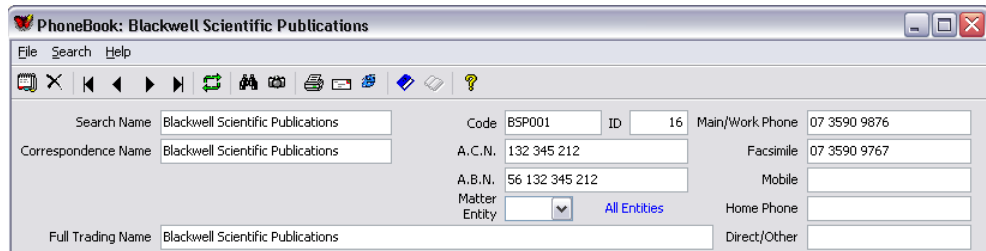
6. Select Blackwell Scientific Publications

When the entry you require is highlighted, you can

- Press <ENTER>

- Double click it
- Click once on the entry and then click <OK>
- <ALT + O>

The screen displays details of the selected entry. The information displayed includes Name details, Code, Company Registration Numbers, Internal ID number, Telephone & Facsimile Numbers.



The screenshot shows a software window titled "PhoneBook: Blackwell Scientific Publications". It features a menu bar with "File", "Search", and "Help". Below the menu is a toolbar with various icons. The main area contains several input fields and labels:

Search Name	Blackwell Scientific Publications	Code	BSP001	ID	16	Main/Work Phone	07 3590 9876
Correspondence Name	Blackwell Scientific Publications	A.C.N.	132 345 212	Facsimile		07 3590 9767	
		A.B.N.	56 132 345 212	Mobile			
		Matter Entity		All Entities		Home Phone	
Full Trading Name	Blackwell Scientific Publications					Direct/Other	

NOTE: The prompts displayed on the top part of the screen and on the second tab – usually the “Document Details” tab are those that have been recorded in Name Labels for the PhoneBook Type being displayed.

The prompts for the Name fields (in this example Correspondence Name & Full Trading Name) vary from one type of PhoneBook record to another.

The prompts for the different Registration Numbers (in this example A.C.N/ and A.B.N.) vary between Countries.

6.1.1 PhoneBook ID

The Phonebook ID is an internal number and is read only. This ID can be used when emails are sent from within the Lexis Affinity product.

Other information is stored on the various tabs.

Your instructor will now go through each tab.

A full explanation of each of the tabs is included in the following section – PhoneBook Tabs.

6.2 PhoneBook Tabs

6.2.1 “Addresses” tab

The “Addresses” tab shows the Street, Postal, Registered and DX address. One of these must be flagged as the Mailing Address.

Master Address: Link



Allows you to link one PhoneBook entry with another. For example, if you deal with several people within a single company, you could link each record. Linking will draw the uncompleted details (such as address, phone numbers, email) through to the linked record. Details that are linked will display with a background of a different colour.

Changing the address on the primary entry will change the details on all of the linked entries.

Jump



This allows you to move to the PhoneBook entry that is linked to this entry.

Unlink

To unlink two addresses, select File | Unlink

Address Layout

The “Countries” option allows you to set different Address formats, to cater for local requirements.

Address

You can record multiple addresses; - Street, Postal, Registered and DX. Note that you can flag the “Registered Address” to be the same as either the Street or Postal Address.

You must also nominate one type of address to be the Mailing Address.

150 characters

Suburb / State / Postcode

The prompts for these fields vary depending on the settings made for each Address layout.

For example if the Address layout is New Zealand, the State field will be named City.

If a Postcode database is incorporated into the database, selecting a Suburb will then complete the State & Postcode fields.

Country

The country of the PhoneBook record. This is an optional field.

Email

The Email address is recorded here and also if an Email Remittance is required. (This applies to Creditor PhoneBook entries.)

6.2.2 “Personal” / “Document Details” tab

The name of this tab varies depending on the “type” of PhoneBook entry. The details here can be used to record a name to be used specifically in documents. For an Individual type of entry there are usually multiple fields which are used for names in separate fields and the Date of Birth. **50 characters**

6.2.3 “Data” tab

The Data tab shows the individual DataForm fields that exist in the selected DataForm. The DataForm fields allow you to record extra information. Typically, a Marketing DataForm may be attached to a PhoneBook entry that allows you to record details about marketing activities that should be directed towards this PhoneBook entry.



Hands On

To illustrate this feature, it is best to locate the record for Adams_Blackwell, who is the Managing Director of Blackwell Scientific Publications. (Marketing activities are usually directed to people or contacts at clients or prospects, not to the company generally)

1. Select the “Relationships” tab
2. Use the left video button to locate the record for Adams_Blackwell
3. Select the “Data” tab
4. On the left hand side – under DataForms select General Marketing
5. Select the “Interests” tab
6. Note that teams are recorded for AFL, NRL and NBL

In particular note that John Adams supports the Essendon Bombers.

7. Use the right video button to return to Blackwell Scientific Publications

6.2.4 “Notes” tab

This tab will display any notes that have already been recorded for this PhoneBook entry. You can also add additional notes by keying text directly in the notes field.

The “Notes” field is also an option in PhoneBook Filter, allowing you to search for records containing (or starting with) a string of text. **2000 characters**

6.2.5 “Precedents” tab

This will display the list of Precedents available and allows generation of those precedents.

You can use the “Filter” tab to quickly locate a precedent, and the “Columns” tab to include or exclude columns from the display.



Hands On

1. Select the “Precedents” tab
2. Highlight the Cocktail Party Invitation and click on **[Merge]**

The Invitation should display on the screen.

3. Close the document – there is no need to save it

6.2.6 “Documents” tab

This shows a list of documents that have been saved to this PhoneBook entry. (The documents may include emails, scanned documents etc.).

You can double-click on a document or highlight it and click on Edit to open the document.

You can also use this tab to attach a new document for this PhoneBook entry.

“Filter” tab

You can use the “Filter” tab to search for a specific document. On the “Filter” tab, you can also select to exclude documents saved to matters belonging to this PhoneBook entry.

“Columns” tab

You can select to include or exclude columns from the display.

6.2.7 “Diary” tab

This tab contains a list of all the Diary entries that have been recorded for this PhoneBook entry, whether they are matter related or not.

From this tab you can create a new Diary entry.

You cannot edit Diary entries from this tab. To edit a Diary entry, select Diary from Case Management.

6.2.8 “Relationships” tab

Forward and backward relationships between PhoneBook entries can be set up in Lexis Affinity. Examples include “is a director of... / has as a director...”, “uses this firm of solicitors / acts for”.

The wording of the Relationships available has been recorded by the Lexis Affinity Library Administrator.



Hands On

1. Select the “Relationships” tab

You will see that Marianne K Thompson is a Director of Blackwell Scientific Publications and that Black Day Publishing Pty Ltd is a subsidiary of Blackwell Scientific Publications.

2. Double click on Thompson_Blackwell

3. Select the “Relationships” tab

You will see that she is a relation of Mark Connor Thompson and was formerly employed by Walter Turnbull Advertising.

4. Close the screen for Maryanne Thompson to return to Blackwell Scientific Publications

6.2.9 “Groups” tab

This tab allows you to designate groups to which this PhoneBook record belongs. The Groups available have been recorded by your Lexis Affinity Administrator. A PhoneBook record can be in more than one group. You can extract the PhoneBook records by Group to be merged with Word Processing documents or use a Group to identify particular types of records to be used as contacts on matters like courts, other parties, bill to parties or key contacts.

6.2.10 “Associated Staff” tab

This tab displays staff members or Employees that have been flagged as being associated with this PhoneBook entry. (This would be the staff members who have the most contact with the individual or organisation.) You can select additional staff members or unflag staff members. This is also a filter option.

6.2.11 “Miscellaneous” tab

There are three vertical tabs;

Internet & Labels

This tab shows the information previously recorded including; Web site Address, Type of PhoneBook entry, Salutation and Default Reference.

Inactive Record

Tick this to indicate if the PhoneBook record should be retained in the database but is inactive. An example is where a PhoneBook entry is a client, but has no active matters. Inactive PhoneBook entries are, by default, excluded from the PhoneBook listing, but can be included by checking the flag “Inactive PhoneBook” in the PhoneBook filter. When a PhoneBook record has been flagged as Inactive, the system will display which operator made the record inactive and the date and time when this happened.

The “Maintenance” section of the screen also displays who created the record and the date of creation, as well as the person who most recently altered the record.

Debtors & Collection

This tab shows the Collection Plan that is attached to this PhoneBook entry, the criteria for sending Accounts Rendered Statements and the Collection Notes recorded on all outstanding bills that are owing by the PhoneBook record. The Debtors balances are also displayed and the last date that the aging process was run. (To update the aging, it is necessary to run the Aged Matter Balances Report and select to update the aging.) You can also add a new note or print the existing notes from this tab.

CliNet

This tab indicates whether or not this PhoneBook entry is visible in CliNet. You can also generate a Password for CliNet access.

6.2.12 “Debt Control” tab

This tab contains a list of Bills that are outstanding where the PhoneBook party is the Debtor. The lower section of the screen has vertical tabs - “Allocations”, “Notes” and “Payment Plans” if there is a Payment Plan attached to any matter.

Highlight a bill and select the following:

(In the Lewisham Reid training files, look for a bill on Matter 012339.)

Allocations

Shows any credit allocations to outstanding bills – such as partial Receipts, Write Offs and Credit Notes.

Notes

Shows any Debtor Comments that have been recorded in relation to the Debt Collection activities. You can add additional notes, edit existing notes or print the notes.

Add Note

Allows you to add a Debtor Comment Note to the selected bill.

Open

Allows you to open the selected bill. You can then re print the bill or check the details.

Trust to Office

Allows you to transfer funds from trust in payment of the account.

(If Combined Ledger System is enabled, this field is not visible.)

Print

Opens the Itemised Debtors report with the selected PhoneBook entry entered as the Debtor. This report will include all outstanding Bills where the PhoneBook record is the Debtor. The information includes the total of each bill, amounts received in payment thereof and a break-up between Fees, Disbursements (including Sundries) and Tax.

Print Notes

Allows you to prints the Debtor Notes.

6.2.13 “Bank” tab

This tab shows the bank account details for this PhoneBook entry. Select the correct format for the Bank Account.

These details are used when transferring funds by EFT Payment.

6.2.14 “Linked Records” tab

Linked Records are used when registering contacts at an organisation where the communication details are the same or similar. For example, the contacts in an organisation could include the person responsible for paying the accounts or the person with whom the firm deals on a day to day basis.

This tab will display the PhoneBook records that have been linked to this PhoneBook entry.

You can open the linked party from this tab, by either double clicking on it, or by highlighting the line and clicking on **[Open]**.

Click on **[Create]** to create a new linked record.

6.2.15 “ID / Reg’n #’s” tab

This tab displays the registration numbers that have been recorded for this PhoneBook entry.

The prompts displayed on this tab will vary depending on the Type of PhoneBook record.

6.2.16 “Safe Custody” tab

This tab displays the Safe Custody Packets and Items that have been attached to this PhoneBook record.

6.3 PhoneBook Menu & Toolbar

Performing different functions in the PhoneBook Entry area can be achieved by either selecting the icon on the Toolbar or by selecting the relevant function from the Menu.

6.3.1 Functions on Menu Toolbar

There are three options on the Menu Toolbar: - File, Search and Help. Functions that are not available are “greyed out” or “disabled”.

File

New	Create a new PhoneBook entry.
Reopen	Lists the last accessed PhoneBook entries.
Delete	Delete the PhoneBook entry.
Link	Allows you to link a PhoneBook entry with one other PhoneBook entry.

Jump to Master

Moves to the PhoneBook entry that is linked to this PhoneBook entry.

Copy Master Copies the details from the Master PhoneBook entry to this entry if the fields are blank.

UnLink Stops the link between the two PhoneBook entries.

Snapshot Create a Snapshot of this PhoneBook entry.

Print Details Prints the details of this PhoneBook entry, including Name, Address, communication details, the matters they are the contact on, the relationships and a listing of the linked records.

Print Report

Prints a list of all the PhoneBook entries that are currently included in the PhoneBook list – (ie according to the Filter selections in place).

Print Collection Notes

Prints all Debtor Comments that have been recorded for this PhoneBook entry.

Exit Closes the PhoneBook entry.

Search

Find Displays the PhoneBook list.

First / Previous / Next / Last

Moves to the First record, Previous record, Next record or Last record currently included in the PhoneBook list (ie according to the Filter selections in place).

Help**Index / Contents**

Not yet implemented

6.3.2 PhoneBook Editing Toolbar



New This icon allows you to create a new PhoneBook entry.



Apply This icon only displays when a PhoneBook entry has been altered and saves the changes you have made. It replaces the New icon.



Delete Deletes a PhoneBook entry. Lexis Affinity will not allow you to delete the PhoneBook entry for a current client or creditor, or if it is attached as a contact on a matter, a current client or a creditor.



First, Previous, Next, Last:

Moves to the First record, Previous record, Next record or Last record currently included in the PhoneBook list (ie according to the Filter selections in place).



Refresh Refreshes the data immediately.



Find Search for an entry in the PhoneBook. This will show the PhoneBook list based on the filters used to select this entry.



Snapshot

Place a copy of this PhoneBook entry on your desktop for easy access.



Print Allows you to print all the details of the selected PhoneBook entry.



Email This icon will only be enabled if an Email address has been recorded on the PhoneBook entry.

Click on this icon to open your Email system.

The Email address will be automatically inserted into the message.



Web This icon will only be enabled if a web address has been recorded on the PhoneBook entry.

Click on this icon to go directly to this Web Address.



Client This icon will only be enabled if this PhoneBook entry is also a client.

Click on this icon to go directly to the client.



Create client

This icon will only be enabled if this PhoneBook entry is not a client.

Click on this icon to open the Client Creation screen with most details of this PhoneBook entry completed.

**Display Related Documents**

Click this icon to open your Document Management System, such as Lexis IM, iManage, Worksite, Redmap, WORLDOX, Radix (if installed).

**Help**

Not yet implemented.

6.4 Printing

You can print the details of an individual PhoneBook entry, or a list of all the PhoneBook entries that are displayed in the PhoneBook Selection screen. The report printed also includes any matters where the PhoneBook entry selected is included as a Contact link.

Printing the selected PhoneBook entry or a list of all PhoneBook entries is controlled by a setting in Employees.

6.4.1 Printing one PhoneBook Entry



Hands On

In this exercise you will print the details for Blackwell Scientific Publications.

1. Open Blackwell Scientific Publications (If not already open)

2. Select 

Details of this PhoneBook entry will be displayed.

3. Close the Print Display

6.4.2 Printing all PhoneBook entries



Hands On

In this exercise you will print a list of all the PhoneBook entries.



1. Select 

The PhoneBook Selection Screen will display.

2. Click on  to clear the filters

3. Select 

You can use the icons on the Print Toolbar to change the display of the report, to move forwards or backwards through the individual pages or to print the report.

4. Click on  to activate the tabs on the left hand side of the screen
5. Click on 
6. *Search Text* Blackwell Click on **[Search]**

The pages where the text can be found will be indicated on the “Search Results” tab.

7. Close the Print Display

6.4.3 Print Toolbar



Zoom to Fit

This will display one page at a time.



Zoom to Width

This will widen the display to fill the screen horizontally.



100% size

This will adjust the display to 100%.



Use these icons to move forwards and backwards through the pages.



Select a page

Use this to move directly to a specified page.



Search for Text

Use this to select specified text.

The text and location of found entries will be displayed on the “Search Results” tab on the left hand side of the screen.



Toggle Tabs

Use this to toggle between displaying and not displaying the “Thumbnails” and “Search Results” tabs on the left hand side.



Copy to Clipboard

Use this to copy the page displayed to the clipboard. The image can then be pasted into another application.

Note this is an image only – not editable text.

**Printer Setup**

Use this to select a printer, alter the properties of the printing, (for example to select duplex printing) or to select a page range.

**Print**

Use this to print to the printer.

**Save**

Use this to save the report to a file.

**Open**

Use this to open an existing saved report.

6.4.4 PhoneBook Selection Screen Toolbar

**New**

Creates a new PhoneBook entry.

**Edit.**

Allows editing of the PhoneBook details for the entry highlighted. This entry will also have a black triangle symbol in the first column.

**Refresh**

Will refresh the data on the screen.

**Clear**

Clears the filters. All PhoneBook entries will then display. Filters will be discussed in detail later in this Workbook.

**Merge**

Create a WP merge file for the PhoneBook entries selected, or merge to a Precedent document.

**Email (Blind Copy)**

Enables users to automatically insert the Email Addresses of PhoneBook entries into the Bcc field of the Email system.

**Print**

Allows you to print a list of all the entries in the PhoneBook based on the filter selection.

6.5 PhoneBook Filter

Filters are used throughout Lexis Affinity to enable users to sort information by different criteria. The filtered information can then be displayed on the screen or used to generate reports and word processing merge files.

The filters vary according to the particular application you are in. However, the basic principle is the same for all filters and once you have mastered one filter you will find you are comfortable using the other filters in the system.

Filters are applied to PhoneBook, Client, Matter, Safe Custody, Creditors and General Ledger functions.

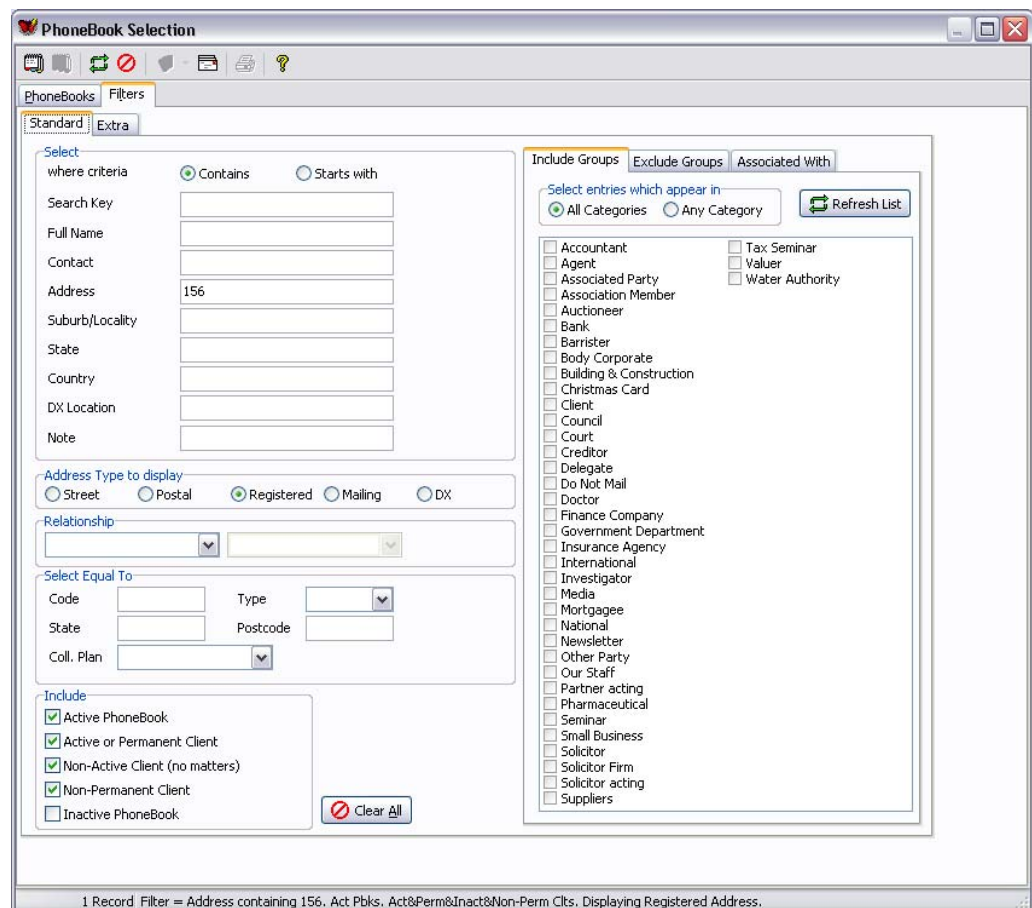


Hands On

1. In the PhoneBook Selection screen, click on the “Filters” tab.

The following screen will display:

NOTE: The last Filter that you have used will stay in force until you clear it.





Hands On

In this exercise you will use the Filter to select PhoneBook entries where the Search Key contains the text “black”.

You can also use this part of the filter to display entries where the Search key or Full name start with specified text.

1. *Select where criteria* Select “Contains”
2. *Search Key* black

The “Contains” test will include the name of Black and Blackwell and also any names where black is part of the name.

3. Select the “PhoneBooks” tab

(You can use <CTRL + TAB> to move between the tabs.)

Now only entries that contain the text “black” are displayed.

4. Click  on the PhoneBook Toolbar

This clears the filter and displays all entries in the PhoneBook.



Hands On

You now need to locate a PhoneBook entry that is a publishing company. You cannot remember if the name includes the word “Publications” or “Publishing”.

1. Select “Filters” tab
2. *Select where criteria* Select “Contains”
3. *Search Key* publi

You do not need to type the full word.

This will find all names that contain the text “publi” (such as Publications and Publishing).

4. Select the Refresh icon 

The PhoneBook Selection screen displays.

The list now only displays entries that contain the text “publi”.



Hands On

In this exercise you will use the Filter to locate PhoneBook entries that are subsidiary companies of another PhoneBook entry.

1. Select the “Filters” tab
2. Click on **[Clear All]**
3. *Relationship* Select “is a subsidiary company of” from the drop down list
4. Select the “PhoneBooks” tab

All PhoneBook entries that are subsidiaries are displayed.



Hands On

In this exercise you will refine the search of subsidiary companies to the NAB subsidiaries.

1. Select the “Filters” tab
2. *Relationship* Click on the down arrow in the second field

Only those PhoneBook entries which have subsidiary companies are displayed.

3. Select NAB
4. Select the “PhoneBooks” tab

Now only the entries that are subsidiaries of NAB are displayed.



Hands On

In this exercise you will use the Filter to locate PhoneBook entries that are in NSW.

1. Select the “Filters” tab
2. Click on **[Clear All]**
3. *Select equal to State* NSW
4. Select the “PhoneBooks” tab

Now only the entries that are in NSW are displayed.



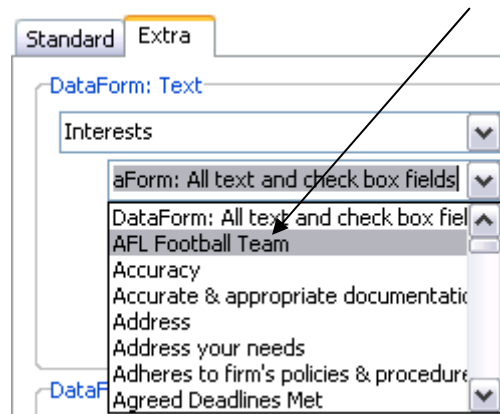
Hands On

In this exercise you will use the Filter to select PhoneBook entries that have indicated they support the Essendon Bombers.

1. Select the “Filters” tab
2. Click on **[Clear All]**
3. *Select Entries which appear in* Select All Categories
4. Select the “Extra” tab

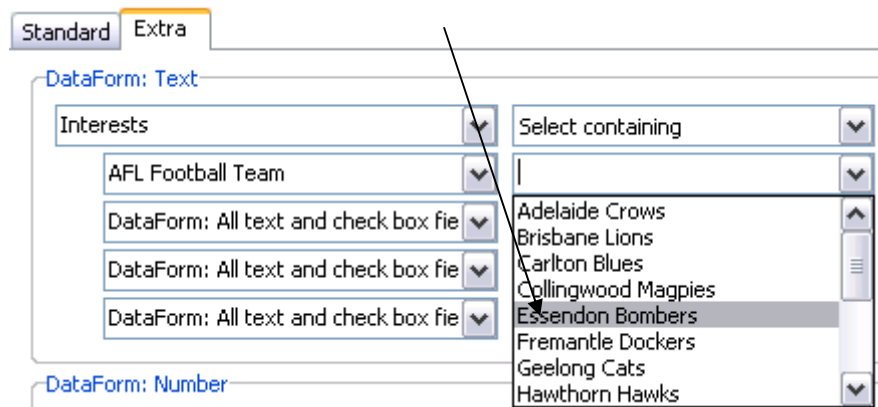
5. *DataForm – Select Containing (Text)*
6. In the top field, click on the drop down arrow and select ‘Interests’

- In the second field select 'AFL Football Team' as the field



The screenshot shows a software interface with two tabs: 'Standard' and 'Extra'. Under the 'Standard' tab, there is a section labeled 'DataForm: Text'. Within this section, there is a dropdown menu titled 'Interests'. The dropdown menu is open, showing a list of options. The option 'AFL Football Team' is highlighted. Other options in the list include 'DataForm: All text and check box fields', 'Accuracy', 'Accurate & appropriate documentat...', 'Address', 'Address your needs', 'Adheres to firm's policies & procedure', and 'Agreed Deadlines Met'. An arrow points from the text 'AFL Football Team' in the instruction above to the highlighted option in the dropdown menu.

- On the right of that field select 'Essendon Bombers' from the possible field look-up table responses



The screenshot shows the same software interface as the previous one. The 'Interests' dropdown menu is now closed, and the text 'AFL Football Team' is visible in the dropdown box. To the right of the 'Interests' dropdown, there is another dropdown menu titled 'Select containing'. This dropdown menu is open, showing a list of options. The option 'Essendon Bombers' is highlighted. Other options in the list include 'Adelaide Crows', 'Brisbane Lions', 'Carlton Blues', 'Collingwood Magpies', 'Fremantle Dockers', 'Geelong Cats', and 'Hawthorn Hawks'. An arrow points from the text 'Essendon Bombers' in the instruction above to the highlighted option in the dropdown menu.

- Select the "PhoneBooks" tab

All PhoneBook entries that are marked as interested in the Essendon Bombers will be listed.



Hands On

In this exercise you will use the Filter to select PhoneBook entries that are to receive Christmas Cards.

- Select the "Filters" tab
- Click on **[Clear All]**
- Select the "Standard" tab
- Select the "Include Groups" tab
- Select *Entries which appear in* Select All Categories
- Tick Christmas card

7. Select the “PhoneBooks” tab

All PhoneBook entries that are marked to receive Christmas Cards are displayed.

8. Note the number of records

(Displayed on the Status line at the bottom of the list.)



Hands On

In this exercise you will modify the Filter to select PhoneBook entries that are to receive Christmas Cards, but excluding those that are marked “Do Not Mail”.

1. Select the “Filter” tab
2. Select the “Exclude Groups” tab
3. Tick Do Not Mail
4. Select the “PhoneBooks” tab

All PhoneBook entries that are marked to receive Christmas Cards but that are not marked as “Do Not Mail” are displayed.

5. Note the number

6.6 Sorting PhoneBook Entries

The entries displayed in the PhoneBook can be sorted by any of the headings that appear in the PhoneBook list. By default, the PhoneBook entries are sorted by Search Key.



Hands On

In this exercise you have been asked to produce a list of all PhoneBook entries that are to receive Newsletters and to sort this list by Suburb.

1. Select the “Filters” tab
2. Click on **[Clear All]**
3. Select the “Include Groups” tab
4. *Select Entries which appear in* Select All Categories
5. Tick Newsletter
6. Select the “PhoneBooks” tab
7. Note “Blackwell” is the first entry

- Click on the heading "Suburb" and drag the mouse to the left.

The entries are now sorted into Suburb order.

The list is sorted in sequence from the leftmost column header to the rightmost column header.


- Click on the Print Icon to print the list.
- Close the print display

6.7 Merging to a Word Document in Precedents

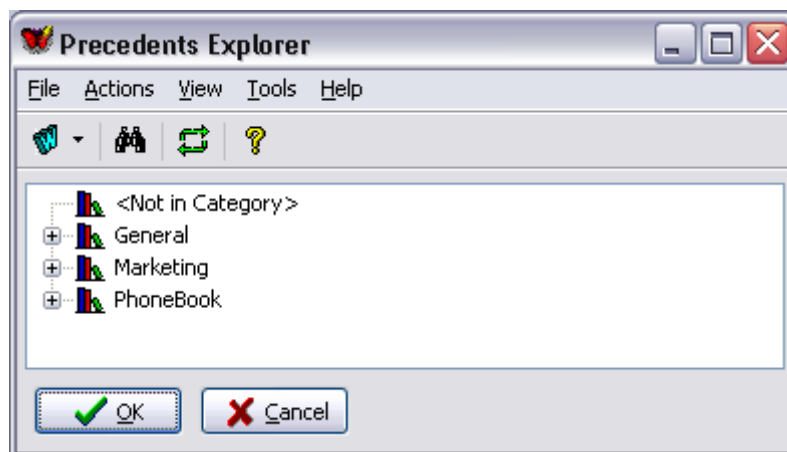



Hands On

In this exercise you will process a merge to a precedent document.

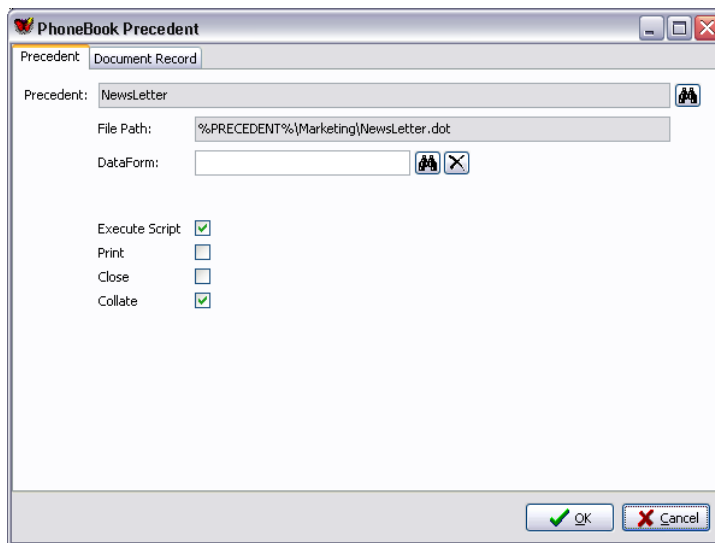
- On the PhoneBook listing screen click on the down arrow 
- Select Precedent Merge

A screen similar to the one below will display:



- Click on  next to Marketing to expand the folder
- Highlight **Newsletter** and click on **[OK]**

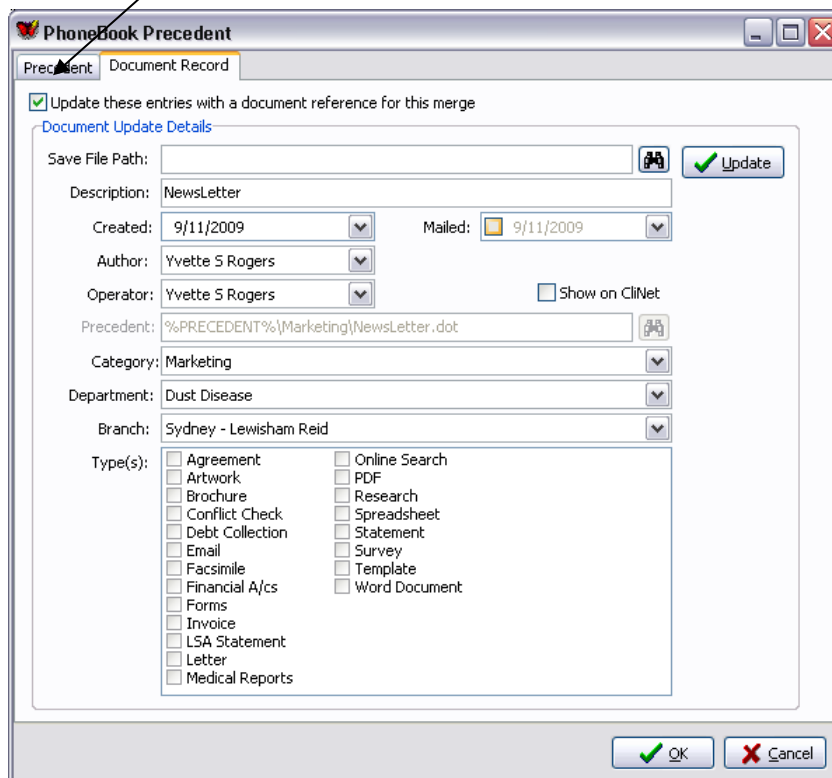
A screen similar to the one below displays:



“Document Record” tab

5. Select the “Document Record” tab

If you want a record on each PhoneBook entry who was sent a newsletter, tick *Update these entries with a document reference for this merge*.



6. Complete the information on this screen

Save File Path is a mandatory field.

For this exercise click on **[Binoculars]** and save to a file on C:.

7. Click **[OK]**

The documents will be produced.

8. On the PhoneBook Selection screen, open the first record
9. Select the “Documents” tab
10. Note the document details
11. Click on **[Binoculars]** to return to the PhoneBook selection screen
12. Drag “Suburb” to the right – to be before “State”

6.8 PhoneBook Filter

The PhoneBook Filter can be used to selectively list PhoneBook entries according to varying criteria.

PhoneBook Filter Options

Select where criteria - Contains

Use this option to locate entries that contain the text you enter in the nominated field.

Select where Criteria - Starts with

Use this option to locate entries that start with the text you enter in the nominated field.

Address Type to Display

Select the Address Type to be displayed on the PhoneBook Selection screen.

When DX is selected, the DX field (ie the DX Number) will be displayed in the Address column, the DX Location will be displayed in the Suburb column and the DX State will be in the State column.

Relationship

Use this option to locate all PhoneBook entries that are related to other entry/ies.

Use the field to the right to specify another PhoneBook entry.

Select Equal to

Code

This allows you to locate entries using the Code field.

Type

This allows you to locate entries of a particular type – eg Business.

State

This allows you to locate entries in one particular state.

Postcode

This allows you to locate entries for a particular Postcode.

Collection Plan

This allows you to locate entries belonging to one Collection Plan.

Include – Active PhoneBook

This will include all PhoneBook records that are not flagged as Inactive.

Include – Active or Permanent Client

This will include only those PhoneBook entries that are also Clients and are Active (ie have current matters) or are marked as Permanent.

Include – Non-Active Client (no matters)

This will include only Clients with no matters.

Include – Non-Permanent Client

This will include only Clients that have not been flagged as “Permanent”.

Include – Inactive PhoneBook

This will include only PhoneBook records that have been flagged as “Inactive”.

Include Groups**Select entries which appear in - All Categories**

This is an “and” filter. For example, if Advertising Agency and Christmas Card are checked, only PhoneBook entries where both these groups are selected will be included in the list.

Select entries which appear in - Any Category

This is an “or” filter. For example, if both Advertising Agency and Christmas Card are checked, any PhoneBook entry that is either Advertising Agency or Christmas Card will be included in list.

Exclude Groups

You can use this in conjunction with the “include” selection to refine your selection.

Associated with

You can use this to locate PhoneBook entries where selected Staff Members are flagged as being associated.

“Extra” tab

The “Extra” tab allows for additional filtering.

DataForm allows you to search for PhoneBook entries that contain specific text or balances in DataForms.

Select Containing

You can use this option to locate PhoneBook that match text in any of the DataForm fields. The Select Containing drop-down list enables you to select a search criterion from Select containing, Start with, Equal to and Not equal to.

Created and Modified by

allows you to search for PhoneBook records that have been created or modified by a certain user, or between two dates.

Modified by allows you to search for PhoneBook records that have been modified by a certain user, or between two dates.

CliNet / Show on CliNet

Tick this to locate all PhoneBook records that are available for viewing in CliNet.

CliNet / Password

Enter a known password to locate a PhoneBook record.

Include records where – Email Address

Exists – includes PhoneBook records that do have text in the Email Address field.

Does not exist - includes PhoneBook records that do not have text in the Email Address field.

6.9 Create a Business PhoneBook entry



Hands On

In this exercise you will create a new PhoneBook entry for “Construction Company”.

You will need to enter details that are relevant to that Company. It is suggested that you prefix the name of the Construction Company with your initials or surname. This will make your entry more easily identifiable and different to any other PhoneBook entries.

1. Select PhoneBook from the Applications Toolbar if not already open
2. Note the icons available on the toolbar at the top of the screen.

These icons allow you perform various functions including:

- Create a new PhoneBook entry
- Edit an existing entry
- Refresh the data
- Clear the filter
- Create a merge file for use in Word
- Send BCC Emails
- Print

Conflict Checking

Before registering a new PhoneBook entry, you should check the existing entries to make sure that the new entry does not already exist.

You can check all PhoneBook records by typing the first few characters of the name in the “Search starting with” field on the PhoneBook Selection screen.

However, to fully check that there is no conflict you should use the Conflict of Interest Checker. This enables you to search various parts of the database.

3. Open Conflict of Interest Checker
Database | Conflict Checker | Conflict of Interest Checker
4. *Template* click on **[Binoculars]**
5. Locate **FULL DETAILS** and double click

The screen will display with default values completed.

6. *Search Criteria / Select Words / Phrases* Enter the name of the record you are searching for

In this case – Construction Company


7. Click on **[OK]**

The results of the Conflict Checking search will be displayed similar to the one shown below:

Printed: 9/11/2009 1:10:02 PM	Page 1
User: YSR Yvette S Rogers	
Override Team Security: Y	
Conflict Checker All Entities All Branches Search Word / Phrase: Construction Company Search Selection Criteria: Archive, Audit Trail, Client, Matter, PhoneBook, Include DataForm,	
Client (0 client found)	
Client Note (0 client note found)	
Matter (0 matter found)	
Matter Contact (0 matter contact found)	
Matter DataForm (0 matter dataform found)	
Matter Debtor (0 matter debtor found)	
Matter HotDocs (0 matter HotDocs field found)	
PhoneBook (0 phonebook found)	
PhoneBook DataForm (0 phonebook dataform found)	
PhoneBook HotDocs (0 phonebook HotDocs field found)	

From this report, you can see that there are no other records with the name or text of Construction Company already recorded.

It is now OK to proceed with registering the new PhoneBook entry.

8. Close the print display
9. Close Conflict Checker
10. Locate or open the PhoneBook Selection screen
11. Click on  to create a new PhoneBook entry
12. *Type* Select Business from the Drop Down List

The Type of entry that you select determines the prompts that are displayed on the screen – these are called the Name Labels. The Name Labels you see in the training files (Lewisham Reid) may be different to the Name Labels for your data files.

13. *Code* Leave blank

This field is left blank and will be automatically populated by Lexis Affinity if this entry becomes a Client or a Creditor.

It is a search option in PhoneBook.

14. *Search Name* **35 characters**

For this exercise, use your initials or your surname.

For a company, you would normally use the Company Name or a short form of the Company Name.

This is the main way Lexis Affinity searches and sorts PhoneBook entries.

15. *Correspondence Name* **80 characters**

Lexis Affinity will insert the text from the “Search Name” field.

Alter it to the name of the construction company.

This field is used in Bills, Debtors Letters, Safe Custody Receipts etc.

16. *Full Trading Name* **150 characters**

Lexis Affinity will insert the text from the “Correspondence Name” field. Alter it if necessary.

17. *Salutation* **35 characters**

Type the name that should appear after the word “Dear” on letters addressed to this PhoneBook entry. This can be their Given Name, Mr/Mrs/Ms Surname, Sir, Madam, Doctor etc. Generally, correspondence will be sent via the contacts attached to this entry, so it this could be a generic term – such as Sir/Madam.

18. *Default Ref* Leave blank

You can use this if there is a common reference for this PhoneBook entry.

For example, for a Creditor, you could enter the Account Number.

19. Complete the Registration Numbers with your own information

20 characters each

The fields displayed here will vary depending on the settings in name labels for Business type entries.

20. Complete the relevant telephone numbers

20 characters each

Generally you would not record mobile, home and direct phone numbers for the business record, only for the contacts.

“Addresses” tab

21. Select the “Addresses” tab

22. *Address Layout* Select the appropriate layout

The prompts that display will vary depending on the Address layout selected.

23. Complete the Street / Postal / Registered and DX Address details

Note you can select the “Registered Address” to be the same as either the Street or Postal Address.

24. Select one of them to be the default mailing address

This is the Mailing Address that will be used in Bills, Debtors Letters etc.

25. *Email* Complete this field with general Email details –
info@construction_company.com.au
26. *Email Remittance ?* Leave unticked

If this PhoneBook entry is likely to become a Creditor, you can tick this to indicate that the Remittance Advice will be sent by Email.

“Document Details” tab (if visible)

27. Select the “Document Details” tab
28. Complete the *Name on Documents*

60 characters

“Miscellaneous” tab

29. Select the “Miscellaneous” tab
30. *Web Site* Complete the Web Site address
31. *Collection Plan* Select “Standard Collection Plan (combined matter)

For example: www.Constructioncompany.com.au.

Collection Plans define the parameters of the Collection cycle, and are recorded by the Lexis Affinity Administrator.

32. *Accounts Rendered Statement* Select “Conditional if a balance is due”

“Notes” tab

33. *Notes* Building & Construction Award 2006

This is used for recording any special comments in relation to this PhoneBook entry.

“Bank” tab

34. Select the “Bank” tab

This is used to record details of the Bank Account. If payments are to be made directly to this PhoneBook entry via an export file generated from Lexis Affinity, these details MUST be completed.

35. *Account Name* Enter the name of the Bank Account **100 characters**
36. *Bank Name* Enter the name of the Bank **100 characters**

37. *Bank Account Format*

Select the appropriate format from the drop down list.

38. Complete the details as prompted

(Refer to the section titled “PhoneBook Creation Fields” for more information on this.)

39. *Open PhoneBook screen for editing on exit* Tick this

There is more information that can be recorded for this PhoneBook entry. Often this information is entered by different staff members

40. Click on **[OK]** to save this entry

6.9.1 Attaching PhoneBook entries to Groups

PhoneBook Groups are used to categorise the PhoneBook database into groups. Groups are determined by the Firm and may include groups such as doctors, barristers, real estate agents.

Groups can also be used for marketing purposes – for example you can create groups for sending a newsletter or Christmas Card and another group for seminar invitations.

These groups are used when filtering the PhoneBook database and using that information to merge with Word.

A PhoneBook entry can belong to more than one group.



Hands On

In this exercise you will add the Construction Company you have just created to the Building & Construction, Christmas Card and Newsletter groups.

1. Select the “Groups” tab
2. Tick Building & Construction, Christmas Card and Newsletter

This indicates that this organisation will receive Christmas Cards and Newsletters.

You can use these Groups as Filters when selecting entries to merge with a Word Document.


3. Close this Phone Book entry

You can do this by

- Selecting the cross in the top right hand corner

- File | Exit
- <ALT + F> X
- <ALT + F4>

This will save the entry.

4. Re-open the PhoneBook listing
5. Click on Refresh  to see the new entry

You may not need to do this, but if the Refresh time is quite lengthy (for example 60 seconds), it may be some moments until you see this entry on the PhoneBook list.

6.10 Registering a Business Contact for a Client

As mentioned previously, the PhoneBook should be the central database for your firm and contain details of all the individuals, companies etc with whom you deal. For this reason it is recommended that the contacts with whom you deal at each Client should be registered in your database.



Hands On

In this exercise you will register yourself as an employee of the Construction Company. (In these steps the name of the employee is Mr R Bannister who is the General Manager of the Construction Company.)

1. Open the PhoneBook record for the Construction Company
1. Select the “Linked Records” tab
2. Click on **[Create]** (on the “Linked records” tab)

The PhoneBook Entry screen displays

3. *Type* Select Business Contact if not already selected

The default type for new Linked Business Contacts is stored in System | General.

4. *Code* Leave blank

This field will be automatically populated by Lexis Affinity if this entry becomes a Client or a Creditor.

It is a search option in PhoneBook.

5. *Surname_Bus. Name*

In this example, you would type Bannister_Construction Company.

If there could be more than one Contact at a particular organisation with the same Surname (as in a Family Company), you may choose to identify each Contact with their initial as well – eg RBannister_Construction Company.

6. *Company Name*

This field has been automatically completed.

7. *Full Company Name*

This field has been automatically completed.

8. *Dept/Division*

Enter the Department or Division for the contact if relevant.

9. *Correspondence Name*

Alter the text to read your name – for example Mr R Bannister.

10. *Position*

Enter the position held by the contact.
In this example General Manager.

11. *Salutation*

Enter the wording required. For example; Mrs Smith, Sir, Doctor Jones.
In this example - Richard

12. *Default Ref* Leave blank for this exercise

The Main/Work and Facsimile numbers are completed.

13. Complete the Mobile, Home and Direct/Other numbers as required

“Addresses” tab

14. Select the “Addresses” tab

The Address details are completed.

15. *Email* Amend the details to be the correct Email address – eg
R.Bannister@Construction_Company.com.au

“Additional Details” tab

16. Select the “Additional Details” tab

The “Additional Details” tab is used to record details of names in separate fields.
(This information may be required in certain documents) as well as the date this contact became a Contact.

17. Complete the Appel, Name & Gender fields

Altering Dates in Lexis Affinity

You can click on the down arrow to open a calendar. Use the left and right arrows to go back a month or forward a month at a time. Click on the year, and either click on the up or down arrow to change the date, or use the up and down arrows on the keyboard.

OR

Alternately;

18. *Became contact on* Tick the check box

19. Press the *right arrow* to the Day - Alter the day

20. Press the *right arrow* to the Month - Alter the month

21. Press the *right arrow* to the Year - Alter the year (enter 4 digits)

“Miscellaneous” tab

22. Select the “Miscellaneous” tab
23. *Collection Plan / Accounts Rendered Statement*

Accept the defaults, as they are not relevant to a contact.

“Notes” tab

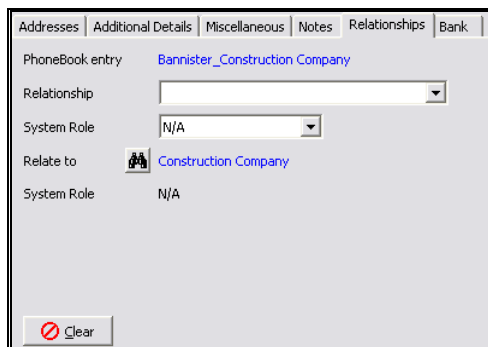
You can add notes about this PhoneBook record on this tab.

“Relationships” tab

Relationships define the type of connection between two records. For example you can relate two records if they are husband and wife, or a person and a company if the person is an employee of the company.

24. Select the “Relationships” tab

The “Relationships” tab is displayed below:



The screenshot shows a software window with several tabs: Addresses, Additional Details, Miscellaneous, Notes, Relationships, and Bank. The 'Relationships' tab is active. The 'PhoneBook entry' is 'Bannister_Construction Company'. Below this, there are three fields: 'Relationship' (a dropdown menu), 'System Role' (a dropdown menu showing 'N/A'), and 'Relate to' (a field with a person icon and the text 'Construction Company'). Below 'Relate to' is another 'System Role' field showing 'N/A'. At the bottom left of the window is a 'Clear' button with a red 'X' icon.

25. *Relationship* Click on the down arrow and select “is an employee of”
26. *System Role* Leave blank for this exercise.

This does not apply to “is an employee of” relationships

27. *Relate to* This has been completed

“Bank” tab

The “Bank” details do not require modification.

28. Click on **[OK]** to update this relationship (and the PhoneBook record)

Debtor Contact Relationships

If an employee is also the person to whom Bills will be sent it is also necessary to relate the Business Contact and the Business with a “is/has a Debtor Contact” relationship.

29. Select the “Relationships” tab
30. Click on **[New]**
31. *Relationship* Click on the down arrow and select “is a Debtor Contact for”
32. *System Role* Lexis Affinity will automatically populate this field with “Debtor Contact”
33. *Relate to* Select the Construction Company
34. Click on **[OK]** to update this relationship

Check the Relationship between the two records

35. Ensure the “Relationships” tab is selected
36. Double click on the name of the Construction Company in the Contact Record column

The Construction Company PhoneBook record displays.
37. Open the “Relationships” tab for the Construction Company

You will see that the Construction Company “has an employee of” <Your Name>
38. Double click on <Your Name> to re open the PhoneBook entry screen for your record.

“Associated Staff” tab

This tab allows you to indicate which employees have an association or contact with the PhoneBook entry.

1. Select the “Associated Staff” tab

Any staff already associated with this PhoneBook record will be flagged.

PhoneBook: Construction Company

File Search Help

Search Name * Construction Company Code [] Main/Work Ph []

Correspondence Name* Construction Company Station No [] Facsimile []

Mobile []

Home Ph []

Full Trading Name Construction Company Direct/Other []

Addresses | Data | Notes | Precedents | Documents | Diary | Relationships | Groups | **Associated Staff** | Miscellaneous | Bank | Linked Records

Active Staff Only

<input type="checkbox"/> Adrian Veitch	<input type="checkbox"/> Kevin Kahn
<input type="checkbox"/> Andrea B Clarke	<input type="checkbox"/> Lorraine James
<input type="checkbox"/> Annie Lee	<input type="checkbox"/> Melissa Ryan
<input type="checkbox"/> Anthony Donnelly	<input type="checkbox"/> Michael Cavanagh
<input type="checkbox"/> Carl Lau	<input type="checkbox"/> Michelle Downs
<input type="checkbox"/> Damien Montague	<input type="checkbox"/> Paul P Phillips
<input type="checkbox"/> Darren James Arnold	<input type="checkbox"/> Penny Leonard
<input type="checkbox"/> Dianna Ferreri	<input type="checkbox"/> Richard Desmond
<input type="checkbox"/> Edwina S Martin	<input type="checkbox"/> Ryan Cole
<input type="checkbox"/> Georgina Gray	<input type="checkbox"/> Sandy Browne
<input type="checkbox"/> Jacqueline Easton	<input type="checkbox"/> Sasha Waters
<input type="checkbox"/> James Anderson	<input type="checkbox"/> Steve Wang
<input type="checkbox"/> Jan O'Neill	<input type="checkbox"/> Thomas Peterson
<input type="checkbox"/> John Woodward	<input type="checkbox"/> Timothy Ng
<input type="checkbox"/> Katrina McNeill	<input type="checkbox"/> Yvette S Rogers

2. *Active Staff Only* Tick this to exclude Inactive Employees
3. Tick Adrian Veitch and Yvette Rogers
4. Click on **[Tick]** to update the PhoneBook record

Review the PhoneBook entry

5. Open the PhoneBook record for the Business Contact
6. Note the fields displayed in yellow.

These are the linked fields. If information in one of these fields is altered on the master record (ie Construction Company), the changes will flow through to the linked record (ie R Bannister).

6.10.1 Creating Diary entry within PhoneBook

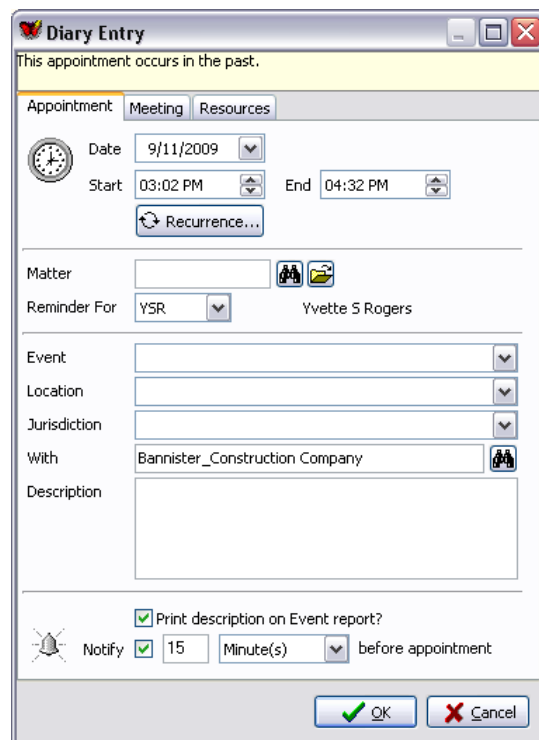
1. Select the “Diary” tab

If there are any existing Diary Events for this PhoneBook entry they will be listed here.

You can record new Diary Events for PhoneBook entries, or for a Matter.

2. Click on **[New]**

The following screen will display:



3. *Date* Accept the prompted date

This is the date that the diary event is to take place.

4. *Start / End*

For this exercise, enter a Start time approximately half an hour ahead of the computer time.


5. *Matter* Leave blank
6. *Reminder for* Accept Default user

NOTE: You can make new Diary Events for other Users in PhoneBook, however to edit Diary Events, select Diary from Case Management..

7. *Event* Select “Meeting” from the Drop Down list

8. *Location* Select "Our Office" from the Drop Down List
9. *Jurisdiction* Leave blank
10. *With* Accept <Your Name>

Lexis Affinity automatically inserts the Name of the PhoneBook entry that you are editing.

If the Diary Event is for another PhoneBook entry, use  to locate the required entry.

11. *Description* to discuss progress

This can be used for more information about the Diary Event.

As only Date / For / Description appear on the Diary tab, you may prefer to enter extra details about the appointment in the Description field.

12. *Print Description on Event Report*

Tick this if you want the Diary Description to be printed on an Event Report.

(Event Report is a list of Diary Events, which can be printed from Diary).

13. *Notify* Tick this 15 minutes before appointment

Adding a Resource

14. Select the "Resources" tab
15. Click on **[Add]**
16. *Type* Select Meeting Rooms
17. Select Small Meeting Room
18. Click **[OK]**


This has reserved the Small Meeting Room for that date and time.

19. Click **[OK]** to save
20. Close the screen

6.11 Individual PhoneBook entries

In this exercise you will register an Individual in the PhoneBook.

For this exercise you could chose your partner, friend or family member.

1. Click on  to open a new PhoneBook entry

2. *Type* Select Individual

3. *Search Name*

For an individual, you would normally use the Surname followed by a comma and then the First name. For example if you are registering Susan Bannister, the Search Name would be Bannister,Susan.

4. *Correspondence Name*

Alter the text if necessary to comply with your Firm's standard.

This is the name that will be used on documents that are produced in Lexis Affinity.

5. *Detailed Name*

Alter the text to read your Full Name - ie include any extra Given Names.

Some documents require this name format.

6. *Occupation*

Enter the occupation of the individual.

7. *Salutation*

Enter the wording required. For example; Mrs Bannister, Susan, Sir/Madam, Doctor Bannister etc.

8. *Code* Leave blank

Lexis Affinity will automatically populate this field if this entry becomes a Client or a Creditor. It is a search option in PhoneBook.

9. *Default Ref* Leave blank

10. Complete the Registration Numbers with your own information

The fields displayed here will vary depending on the settings in Name Labels for Individual type entries.

11. Complete the relevant telephone numbers

“Addresses” tab

12. *Address Layout* Select the appropriate format
13. Complete the Street Address and flag it as the Mailing Address

“Personal Details” tab

The “Personal Details” tab will be displayed and is used to record details of names in separate fields as well as a Date of Birth. This information is also required in certain documents.

14. Complete the details in each field.

“Miscellaneous” tab

There is no need to make any changes here.

“Notes” tab

There is no need to enter a note for this exercise.

“Bank Details” tab

There is no need to enter details for this exercise.

15. *Open PhoneBook screen for editing on exit* untick this
16. Click on **[OK]** to save

6.12 PhoneBook Creation Fields

Type The Types are registered in Name Labels. Additional Labels can be created if required.

NOTE re Joint Parties.

When registering a Joint Party, you should register the Joint Party as a PhoneBook record and then use the “Linked Records” tab to create the separate Individual records. (Remember to change the PhoneBook Type to the correct type if the default is Business Contact.)

Search Name

This field must be unique for every entry. This is the primary search and sort field.

It is recommended that you adopt the following as guidelines to the structure of Search Names.

Barrister	Surname, Given Name
Business	Full Business Name
Business Contact	Surname_Business Name
Court	Court Name, Location
Individual	Surname, Given Name
Joint Party	First Party Surname, Given Name & Second Party Surname, Given Name
Staff	Initials (same as Employee record)

Code This field will be updated automatically if this entry becomes a Client or a Creditor.

This field is a search option in the PhoneBook filter.

Salutation This field is used in any word processing documents that are produced by Lexis Affinity and should conform to your Firm's standard salutation requirements.

Default Ref This field can be used for a reference code your client or creditor gives your Firm (for example, the accounts payable code allocated to your Firm by a creditor). This field can be used in word processing documents for general correspondence.

PhoneBook fields

This table shows the field names and the maximum number of characters.
The Affinity Field Names are 'customised' to suit various types of PhoneBook entries.
For example LongName is Full Trading Name for a Business PhoneBook entry.

Affinity Field Name	Barrister	Business	Court	Business Contact	Our Firm	Individual	Joint Party	Staff	Length
Code	A	B	C	E	F	I	J	S	
Search Name	Search Name	Search Name	Search Name	Surname_Bus.Name	Search Name	Search Name	Search Name	Initials	35
Name	Chamber Name	Correspondence Name	Court Name	Company Name	Correspondence Name	Correspondence Name	Correspondence Name	Name	100
Title	Correspondence Name		Registry	Correspondence Name	Main Contact				100
Occupation	Barrister's Clerk		Division	Position	Not Used	Occupation		Position	100
Long Name	Name for Cheques	Full Trading Name	Name for Cheques	Full Company Name	Full trading name	Detailed Name	Names in Full	Full Name	150
Short Name			State in Full	Dept/ Division	Not Used				40

Field Name	Length	Field Name	Length
Address	150	Phone Fields (each)	20
Suburb	35	Email	60
State	20	Web address	60
Postcode	20	Notes	200
Country	30	Default Reference	20
Postal Address	150	Personal tab	
Postal Suburb	35	Appel	32
Postal State	20	Given Name	50
Postal Postcode	20	Middle Name	50
Postal Country	30	Family Name	50
DX (number)	6	Bank Details	
DX Location	50	Account Name	100
DX State	3	Bank Name	100

Australian		New Zealand		International	
BSB Number	6	Account Number	2-4-7-3	Branch Code	10
Account Name	30			SWIFT Code	20
Account Number	10			Long Account Number	20

Notes


7. Clients

It is recommended that all Clients are created as PhoneBook entries in the first instance. The PhoneBook record can then be converted to a Client record. Remember to check all the information already recorded, in particular Groups and Relationships, as this may be different once a prospect becomes a Client.

7.1 Display Client

Lexis Affinity stores information about the number of matters (both Active, Completed) and the number of archived matters, the total balances of those matters, and information about Safe Custody documents that are being held for that client.

You can open Clients from:

- the Application Toolbar
- The Client icon on the PhoneBook record for that Client 
- Database on the Global Navigation toolbar



Hands On

In this exercise you will display Blackwell Scientific Publishing.

1. Click on Clients on the Application Toolbar
2. Locate and open Blackwell Scientific Publications

Your instructor will go through each tab.

A full explanation of each of the tabs is included in the following section – Client Tabs.

7.2 Client Tabs

The top section of the screen displays some of the general information about the Client.

Matter Entity

Select an Entity to display information on each tab that relates to matters in the selected Entity. Alternately leave this blank to display all information.

Check Client Notes

If displayed on a Client screen, (or Matter) this indicates that a 'Note' recorded for the client has been flagged as an "Alert". You can click on the icon to view the "Alert" note/s.

7.2.1 "Balances" tab

There are three vertical tabs – "Financial", "Billing/Analysis" and "Collection".

"Financial"

- The consolidated account balances for all of the current and archived matters belonging to this client for the entity selected above (ie "Matter Entity").
- Aged Debtors balances noting the date the ageing was last re-calculated. (You can update the ageing by printing an Aged Debtors Report and ticking "Update Client/Debtor ageing").
- Exposure Limits – Limits displaying in red indicate that the limit has been exceeded.
- General Control Information including;
 - Fee Rate Code if applicable
 - If this Client is to receive regular Trust Statements
 - Last Audit Number and the User who modified the record
 - Non-Resident Withholding Tax Status
 - Default Commission Plan
 - Fee Sheet Options

If Foreign Currency is enabled:

Note that the balances shown are converted to the home currency at the current Exchange Rate.

"Billing/Analysis"

Billing

Displays information about the Tax Status, Billing Template, Default Scale Costed Fees, if a default Sundry is to be added to a Bill, or if a default Discount rate is to be applied to Bills.

Analysis

Displays information about Referred by, Business Source and Industry Classification.

"Collection"

Displays information about:

- Collection Plan selected
- Accounts Rendered Statements
- Collection Notes. If they are Matter related notes, the Matter Number will be displayed. Notes may also be printed. New notes may be added, however these are not attached to a specific matter.

7.2.2 “Matters” tab

Displays a list of current matters for this client. Additional information is available for each matter.

Select the “Columns” tab on the right hand side to include or exclude columns. These settings stay in force until changed.

Matters display in different colours.

Black	Matters with no Hold status – ie Normal Processing.
Grey	Matters with Registration Hold.
Blue	Matters with a Final Bill Warning.
Red	Matters with a Hold New Time / Disbursement Warning or where the Client is on Credit Hold.
Green	Completed Matters (This colour can be set by your Lexis Affinity Administrator).

Double click on a matter to open it. If you select to edit or open a Matter, the client screen will remain open on the Desktop but may be covered by the matter screen.

7.2.3 “Archived” tab

Displays a list of matters for this client that have been archived. You can double click an archived matter to open it.

7.2.4 “Address” tab

Displays the Address, Telephone and Internet, Personal/Document Details, Notes and Bank details for the Client.

7.2.5 “Precedents” tab

This will display the list of Precedents available and allows generation of documents based on those precedents.

7.2.6 “Documents” tab

This shows a list of documents that have been saved to this Client entry. (The documents may include emails, scanned documents etc.).

You can use the “Filter” tab to search for a specific document. On the “Filter” tab, you can also select to exclude documents saved to matters belonging to this Client entry. You can

double-click on a document or highlight it and click on Edit to open the document. You can also use this tab to attach a new document for this Client entry.

7.2.7 “Notes” tab

Displays other “Notes” previously recorded about this Client. These are not matter related notes.

New Notes can be added here or existing Notes deleted or edited.

Notes can be flagged as “Alert”. In this case a prompt “Check Client Notes” will be displayed in red on the Client screen and on the Client’s Matter screens.

Additionally, a pop up dialog will display when posting most transactions to a matter, where the transaction is actioned from the desktop (not from within the matter)

7.2.8 “Safe Custody” tab

Displays details of Safe Custody items stored or held by your Firm on behalf of this client.

Safe Custody Items appear in different colours:

Blue	Items held in Safe Custody
Red	Borrowed items
Black	Released items

New Safe Custody Packets and Items can be added here, or existing details altered, including borrowing or returning items.

7.2.9 “Debt Control” tab

This tab contains a list of Bills that are outstanding on the Client’s matters and the Bill to party. The lower section of the screen has vertical tabs - “Allocations” and “Notes” and “Payment Plans” if there is a Payment Plan attached to any matter. Highlight a bill to display information on these tabs, or to add a note, open the bill, process a Trust to Office transfer or print as list of outstanding accounts or print the notes..

“Allocations” tab

Shows any credit allocations to outstanding bills – such as Receipts, Write Offs and Credit Notes.

“Notes” tab

Shows any notes that have been recorded in relation to the Debt Collection activities. You can add additional notes, edit existing notes or print the notes.

“Payment Plan”

Where an outstanding Bill has a Payment Plan attached, details of the Payment Plan and instalments received will be displayed.

Add Notes

Allows you to add Debt Collection Notes to the selected bill.

Open Allows you to open the selected bill. You can then re print the bill or check the details.

Trust to Office

Allows you to transfer trust funds in payment of the account (if this feature is enabled).

If Combined Ledger System is enabled – this option is not available.

Print Allows you to print an itemised list of outstanding accounts.

Print Notes Allows you to print all the Debt Collection Notes on all outstanding accounts.

7.2.10 ID/Reg'n #s tab

This tab displays the Registration Numbers. The prompts displayed here vary depending on the Type of Client..

If Combined Ledger System is enabled

This tab also shows the Withholding Tax Rate that has been set on the matter. (This rate is required if the client will be investing funds in an external financial institution.

7.2.11 “Trust Loans” tab

If Combined Ledger System is enabled

This tab is only visible in datasets with Combined Ledger enabled.

This tab will display an audit trail of advances from and repayments to the Firm Float, for any Matter for the Client. (The advances cover the situation where there are no trust Funds for the Matter.)

7.3 Client Menu & Toolbar

Performing different functions in the Client area can be achieved by either selecting the icon or by selecting the relevant function from the Menu.

7.3.1 Functions on Menu Toolbar

There are three options on the Menu Toolbar: - File, Matter, Search and Help. (Search and Help are standard).

File

New Record a new Client

Edit Edit or alter an existing Client

Reopen Lists the last accessed Clients

Hold Allows you to hold all transactions except receipts, for all matters for that client. These matters will be displayed in red.

Delete Deletes the Client

Snapshot Places this Client on the Snapshot Pane

Print **Client Report**
This report provides a summary of the financial status of the client and the communication details recorded..

Collection Notes

This option allows you to print the Collection Notes for the Client

List of Current Matters

This option allows you to print a list of the current and completed matters for this Client.

List of Archived Matters

This option allows you to print a list of the archived matters for this Client.

List of All Matters

This option allows you to print a list of every matter opened for this Client.

Matter Balance Summary

This option allows you to print a list of every matter for this client and the Unbilled Fees, Unbilled Disbursements, Unbilled Anticipated Disbursements, Unbilled Sundries, Debtors, Trust and Investment balances.

Ledgers – Combo by Date

This option allows you to print a Combo Ledger for a Client. This will include all transactions in date order for all current matters belonging to this client.

Matter

- New** Create a new matter.
- Edit** Edit the selected matter.
- Open** Open the selected matter.

7.3.2 Client Toolbar

**New Client**

Create a new client.

**Edit**

Edit this client.

**Hold**

Places the Client on Hold for all work

**Perpetual Payment Plan**

Opens the Perpetual Payment Plan screen.

**Delete**

Delete this client. Lexis Affinity will not allow you delete a client that has matters, archived matters or safe custody packets attached.

**PhoneBook**

Open Client's PhoneBook entry.

**New Matter**

Create a new matter for this client.

**Edit Matter**

Edit this matter – this icon only becomes active when the Matter tab is selected.

**First, Previous, Next, Last**

The VCR buttons are a standard method of moving through screens of clients.



Refresh. Refresh the data on the screen.



Find: Opens the Client Selection screen.

**Snapshot**

Puts a Snapshot of this client on the Desktop.

**Print:**

Prints the Client summary details.

When viewing the "Matter" or "Archived" tab, this field allows you to enter in the matter number that you are looking for, belonging to this client.



Display Related Documents

Click this icon to open your Document Management System, such as Lexis IM, iManage, Worksite, Redmap, WORLDQX, Radix (if installed).

7.4 Printing


You can print the details of an individual Client or a list of all the Clients displayed in the Client Selection screen. (This is determined by the Filters that are in use at the time).

7.4.1 Printing details of one client



Hands On

In this exercise you will print the details for Blackwell Scientific Publications.

1. Open Blackwell Scientific Publications if it not already opened
2. Select 

Details of the Client will be displayed.

You can use the icons on the Print Toolbar to change the display of the report, to move forwards or backwards through the individual pages or to print the report.




3. Close the Print Display

7.4.2 Printing all Client records



Hands On

In this exercise you will print a list of all the Clients.

1. Click on  to display the Client List
2. Click on  to clear the filters
3. Select 

The list of Clients will display on the screen, in the same order as the Client Selection screen.

You can use the icons on the Print Toolbar to change the display of the report, to move forwards or backwards through the individual pages or to print the report.

4. Use the various icons to become familiar with their operation
5. Close the Print Display

7.5 Client Filter

The Client Filter can be used to selectively list Clients according to varying criteria.

The Filter screen is shown below:

Client Filter options

Select where criteria contains / starts with

You can use these options where you may only know part of a name or are unsure exactly how a client may have been recorded in Lexis Affinity.

Select Equal to – Partner

You can use this option to print a list of all the Clients that a Partner manages.

Select Equal to – Introducer

You can use this option to print a list of all the Clients that have been introduced by a nominated Employee.

Select Equal to – Client Type / Business Source / Industry Classification / Collection Plan / Entity / Default Source Country / Withholding Tax Rate

You can use this option to print a list of all the clients that match the selections you enter.

Payment Plan – None / Perpetual

You can use this option to list all Clients with no Payment Plan attached, or with a Perpetual Payment Plan.

Introduced – Since / Before

Select a date range to include those clients introduced since a certain date or before a certain date.

Include Clients – All

Tick this to include all the Clients regardless of their Hold Status.

Include Clients – On Hold only

Tick this to include all the Clients who have been put on Hold.
You can also complete the date range to locate Clients who have been put on Hold within a specified period.

Include Clients – not on Hold only

Tick this to exclude Clients who are on Hold.

Only include active or permanent Clients

Tick this to include Active Clients (ie those who have current matters) and Permanent Clients (ie those who were flagged as permanent).

Include Client Groups

The Client Groups will be listed with check boxes beside each. Tick the ones required.

The drop down list contains the Master Client Groups.



ticks all Groups



unticks all Groups

Refresh List

Displays any new Groups or Master Groups that have just been created.

Exclude Client Groups

You can use this option to include all but one group.

The Client Groups will be listed with check boxes beside each. Tick the ones to be excluded.

The drop down list contains the Master Client Groups.



ticks all Groups



unticks all Groups

Refresh List


Displays any new Groups or Master Groups that have just been created.

7.6 Create New Client



Hands On

In this exercise you will create a Client from the PhoneBook entry for the Construction Company you registered earlier.

1. Open PhoneBook from the Application Toolbar
2. Locate and open the Construction Company you created earlier
3. Click on  on the Toolbar

The Client Creation screen will display.

Any information already recorded in the PhoneBook record will be displayed.

The prompts below detail what extra information can/should be recorded for a client

4. *Client Type* Select Business from the drop down list
5. *Business Name* Accept the prompted name

The Company registration numbers display – accept these.

6. *Permanent* Tick this
7. *Withholding Tax Rate* Select a rate if applicable

If Combined Ledger System is enabled:

This rate is required in a Combined Ledger System, if the client will be investing funds in an external financial institution.

8. *Client Code* Lexis Affinity Library will automatically populate this field

If you do not click in this field or press <TAB> through the field, at this stage, the code will be allocated when you save the Client.

9. *Master Group* Leave blank for this exercise

A Master Client Group is used for reporting and filtering and is comprised of more than one Client Group.

10. *Client Group* Leave blank for this exercise

A Client Group is used for reporting and filtering and is comprised of Clients (separate Entities, Individuals etc) who share something in common.

11. *Introduced* Accept today's date

12. *Introducer* Leave blank for this exercise

This field is used if an employee introduces this client to the Firm.
In a later step you will flag this client as being referred by Alexander & Associates (a firm of accountants).

13. *Service Partner* MMC

14. *Initiated By* This displays the name of the logged in User and cannot be changed.

15. Review each tab except the “Financial” and “Billing / Analysis” tabs

The details entered in the PhoneBook entry have been brought into the Client record.

“Financial” tab

16. Select the “Financial” tab

17. *Fee Rate Code* Leave blank for this exercise

A Fee Rate Code allows you to set rates for each Employee or Employee Type for this particular Client.

If this client can have matters in other entities then you can enter the Unbilled Fees, Disbursement and Total Exposure Limits for each entity.

In this exercise you will only enter values for the entity LR.

18. *Entity* Select LR

19. *Unbilled Fees* 5000

20. *Disbursements* 1000

21. *Total Exposure Limit* 6000

22. Press <ENTER> to complete the table

23. *Allow Entity for New Matters and Packets to be Overwritten* Leave unticked

24. *Entity for New Matters and Packets* Select Lewisham Reid

25. *Branch for New Matters & Packets* Leave blank

The branch will be selected at the time of creating the matter.

26. *Default Trust Statement for New Matters* Tick this

If Combined Ledger System is enabled:

27. *Is Client a Non-Resident for the purposes of Withholding Tax?* Leave unticked

28. *Default Commission Plan for New Investments* Select 5%

“Billing / Analysis” tab


29. Select the “Billing / Analysis” tab

Billing

30. *Default Tax Status on Bills for New Matters* Select Taxable Bill

Select from:

Taxable Bill, Export and Other Tax-Free.

31. *Bill Template* Click on  to locate the available Bill templates

32. Select DETAILED

33. *Default Scale Costed Fees on Bills for New Matters* Leave unticked

34. *Apply Sundry at Time of Billing* Leave blank for this exercise

This will allow you to add an additional amount to Fees when generating a draft bill.

35. *Apply Discount Rate to WIP* Leave blank for this exercise

This will allow you to reduce the WIP by a percentage rate.

Analysis

This information will help identify who referred this client and /or how this client came to the firm (Business Source) the Industry in which the Client works and the country the client operates from.

Note that Business Source and Industry Classification fields cannot be blank.

36. *Referred By* Click on  to open the PhoneBook list

37. Select Alexander & Associates

This is the company or the person who referred this client to your Firm.

38. *Business Source* select Accountant

This is the business source of the new client. In this case Alexander & Associates are Accountants.

39. *Industry Classification* select Building & Construction

This is the industry that the client works in.

40. *Default Source Country* Accept Australia

This field is not relevant for this exercise.

Unit / Minute Options When Submitting Fee Sheet

“Use Employee / System Default” is displayed as this option has been set in System Defaults (as stored on System | Fee Sheet) so that Employees cannot override the setting.

“Collection” tab

41. *Collection Plan* Accept the prompted plan
42. *Accounts Rendered Statement* Accept ‘Conditional if a balance due’

“Bank” tab

43. Review the Bank Account details

The details are the same as those on the PhoneBook record.

44. Click on **[OK]** to save the Client information


A screen displaying details of the Client, the number of matters, number of archived matters and number of Safe Custody packets displays.

7.6.1 PhoneBook Groups

When you create a Client, Lexis Affinity will automatically update the PhoneBook record to include that Client in the Group named “Client”.



Hands On

1. Click on  to open the PhoneBook entry for this client
2. Select the “Groups” tab

The Client Group should be ticked.
3. Close the PhoneBook screen

7.7 Client Creation Fields

Permanent This is a flag you can set to indicate that the client is on going.
The Client Filter allows you to select “active & permanent” clients.

Client Code This field is completed automatically by Lexis Affinity when you tab to this field after entering the client name.

Master Client Group

Master Client Groups, group together Client Groups.
This is an optional field.

Client Group

Client Groups are used to collate the individual entities or individuals that are part of the same organisation.

Introduced Lexis Affinity prompts with the system date.
You may change this if necessary.

Introducer The Employee in your Firm that introduced this client.

Initiated By This indicates the logged in user and cannot be changed.

Service Partner

The Partner responsible for the overall management of this client.

Withholding Tax Rate

If Combined Ledger System is enabled:

This rate is required in a Combined Ledger System, if the client will be investing funds in an external financial institution.

“Financial” tab

Fee Rate Code

Fee Rate Codes allow you to attach different time rates to a client.

Limits by Entity –

If matters are to be opened in multiple entities then these details will need to be completed for each entity if they vary from each other.

If Foreign Currency is enabled, these details should also be completed for in the currency of that Entity.

Unbilled Fees Limit

If the setting in System | Posting (Alert User when Client Balance exceeds – Unbilled Fees Limit) is ticked, a warning will be displayed when the Total Unbilled Fees (excluding Tax) on the Client’s matters exceeds the Unbilled Fees Limit.

Unbilled Disbursements Limit

If the setting in System | Posting (Alert User when Matter Balance exceeds – Unbilled Disbursement Limit) is ticked, a warning will be displayed when the Total Unbilled Disbursements on the Client’s matters exceeds the

Unbilled Disbursement Limit.

Total Exposure Limit

If the setting in System | Posting (*Alert User when Client Balance exceeds – Total Exposure Limit*) is ticked, a warning will be displayed when the total of WIP, Unbilled Disbursements, Debtors less Trust exceeds 100% of the Total Exposure Limit.

If these amounts have been exceeded, they are displayed in red. You can print a Client Exposure Limit Report for details on clients that have exceeded the limits.

Allow Entity for New Matters and Packets to be Overridden

If ticked, the default Entity can be altered when creating new Matters or Packets.

Entity for New Matters and Packets

Select the default Entity.

Branch for New Matters and Packets

This can be left blank, or a default Branch can be selected. When creating new matters, the default Branch can be altered.

Default Trust Statement for New Matters

If ticked, new matters will have “Send Trust Statement” ticked. This can be altered for each matter if required.

If Combined Ledger System is enabled:**Is Client a Non-Resident for the purposes of Withholding Tax?**

This is for the system to identify which RWT Certificate should be printed.

Default Commission Plan for New Investments

If the Commission Plan is the Firm Default, there is no need to complete this.

“Billing / Analysis” tab**Billing**

Default Tax Status on Bill for New Matters - Select the default from the drop down list.

Bill Template - The Bill Template determines the format of the bill that will be produced for matters registered to this client.

Default Scale Costed Fees on Bill for New Matters - If ticked, bills on new matters will default to using the total of the Scale Costs as the Total to be billed. If not ticked, the value of the time will be used.

If Foreign Currency is enabled:

Default Currency for New Matters - The default currency would be used as the normal currency for billing this client and also the currency to be used when requesting funds up front.

Apply Sundry at Time of Billing

Select a default Sundry to be added to the value of the bill.

Apply Discount Rate to WIP

Select a default Discount Rate to be applied to WIP when billing.

Analysis

Referred By - Select the referee from the drop down list.

Business Source - Select the source of the new client from the drop down list.

Industry Classification - Select the industry to which this client belongs from the drop down list.

Default Source Country - Select the country where this client operates out of. Some reports can be filtered by Default Source Country.

Unit / Minute Options When Submitting Fee Sheet

Select the option to be applied to Fee Entries for this Client.

“Collection” tab

Collection Plan - a collection plan is a set of account follow up letters. Select the plan for this client from the drop down list.

Accounts Rendered Statement - Select the preferred option for issuing statements.

“Bank” tab

Record details of the Client’s Bank Account. These details will automatically populate fields when processing a Direct Debit type of entry in Cheques and in an aba file if payments are made electronically.

NOTE: A Client Number is automatically allocated by Lexis Affinity and is shown in the Edit/Display Client screens.

7.7.1 Client Groups / Master Client Groups

Client Groups are used to collate the individual entities or individuals that are part of the same organisation. For example Black Day Publishing Pty Ltd and Blackwell Scientific Publications are subsidiaries of the Black Publishing Group and both companies are flagged as belonging to the Black Publishing Group.


Similarly, you may have separate client records for Peter Binet, Heather Binet and Binet Homes Pty Ltd. Peter and Helen are married and are the directors of the 2 companies, so it is useful to attach all these clients into a group which could be called “Binet”.

Master Client Groups are used to collate Client Groups into a higher level of grouping – for reporting and filtering.

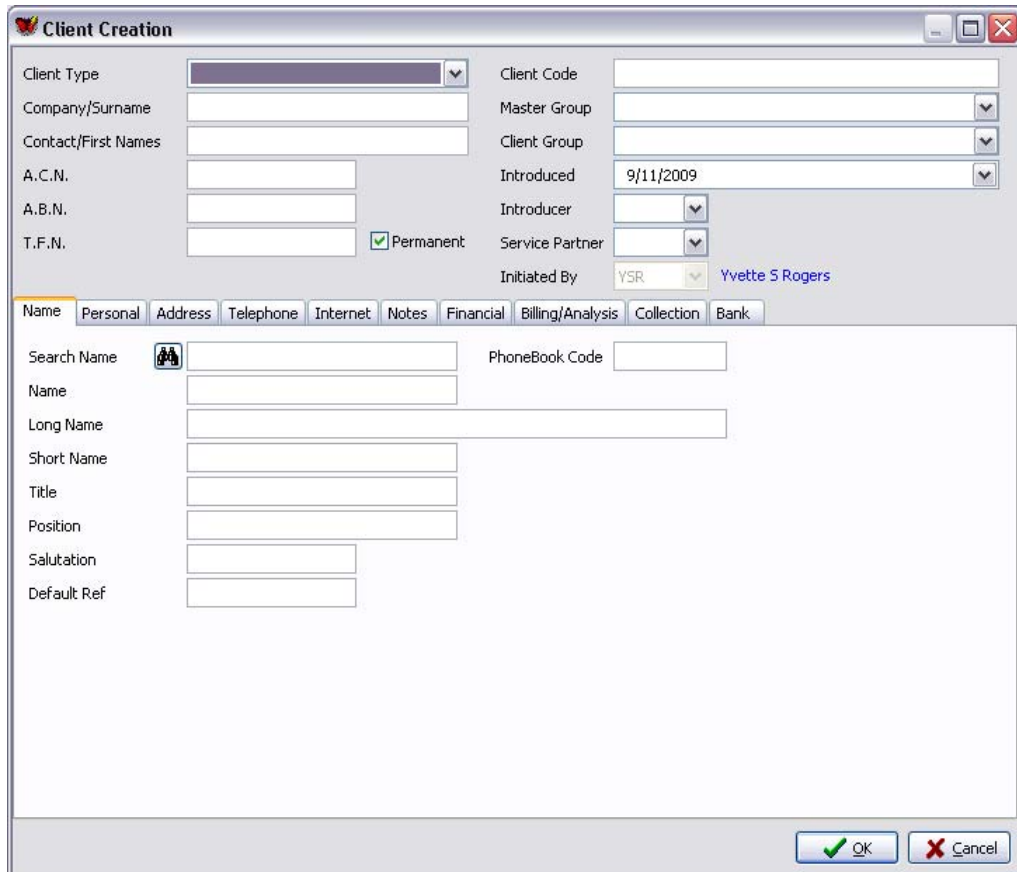
7.8 Alternate Method of creating Clients



Procedure

You can also create Clients by clicking on the New Client icon on the Client Toolbar. 

The following screen displays:




Client Creation

Client Type: [Dropdown]
 Company/Surname: [Text]
 Contact/First Names: [Text]
 A.C.N.: [Text]
 A.B.N.: [Text]
 T.F.N.: [Text] Permanent

Client Code: [Text]
 Master Group: [Dropdown]
 Client Group: [Dropdown]
 Introduced: 9/11/2009 [Dropdown]
 Introducer: [Dropdown]
 Service Partner: [Dropdown]
 Initiated By: YSR Yvette S Rogers

Name
 Personal
 Address
 Telephone
 Internet
 Notes
 Financial
 Billing/Analysis
 Collection
 Bank

Search Name:  [Text] PhoneBook Code: [Text]
 Name: [Text]
 Long Name: [Text]
 Short Name: [Text]
 Title: [Text]
 Position: [Text]
 Salutation: [Text]
 Default Ref: [Text]

OK Cancel

1. Select the “Name” tab
2. Click on the binoculars
3. Locate the PhoneBook entry for the client
4. Review the details brought over from the PhoneBook record and add in the additional details where required
5. Click on **[OK]** to save the client

Notes

8. Matters

Matters are the individual files that are handled by your Firm. A Client may have any number of files or matters and these can be active, completed, or archived.


8.1 Create New Matter

Matters are created from the Client screen.

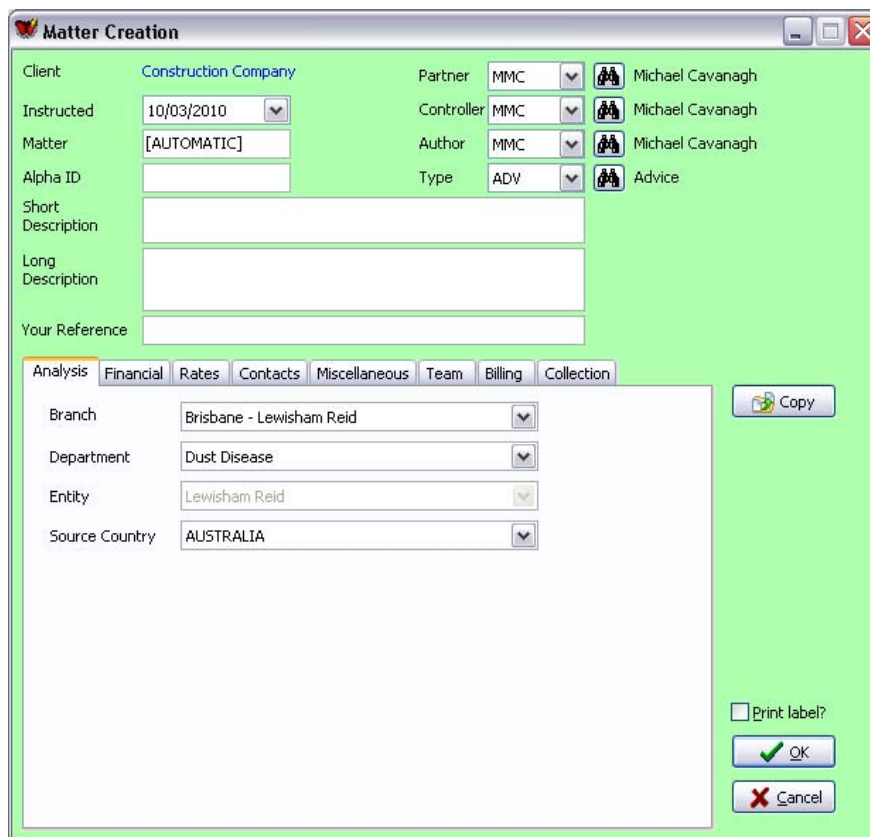


Hands on

In this exercise you will register a matter for the Construction Company you created earlier.

1. Open Clients from the Application Toolbar
2. Select the Construction Company you registered previously
3. Click on  to open the Matter Creation screen:

The Matter Creation Screen similar to the one shown below is displayed:



NOTE: The screen colour will indicate which Entity is currently selected on the “Analysis” tab.

4. *Instructed* Accept the prompted date

You can alter this if required by re typing the date or using the Calendar.

5. *Matter* Accept the prompt

Lexis Affinity will automatically allocate a matter number when the matter is updated.

6. *Alpha ID* LEASE / LANES MOTORS

This is an optional field. It can be used to identify individual matters for a client.

7. *Short Description* Lease of 808 George Street

This is the description that will appear on reports.

8. *Long Description* add the text "to Lanes Motors"


You may enter a longer description that can be used for correspondence and bills.

9. *Your Reference* LEASE/CONSTRUCTION COMPANY

10. *Partner* Click on  to open a list of Partners

11. Select ESM

Lexis Affinity assumes that the partner responsible for this matter is the partner who has overall responsibility for the client.

To change this you can retype the Employee ID or select it from the Drop Down List, or click on  and select from the list.

12. *Controller* Select RKD

Lexis Affinity assumes the client partner is the Controller for this matter.

13. *Author* Select MD

The Author is the person handling the matter.

14. *Type* Select LEASE

This is the type of work that you are doing for this Matter.

Matter Types have been created by the Lexis Affinity Administrator

Matter Types have defaults for certain pieces of information including DataForms, Workflow area, and Fee and Billing information. If these defaults are registered, they will be inserted in the relevant fields.

15. *Print Label* Leave unticked

16. Select the "Analysis" Tab

17. *Branch* Accept the prompted Branch

Lexis Affinity automatically defaults to the Branch of the Author.

18. *Department* Accept Commercial

Lexis Affinity automatically defaults to the Department of the Author.

19. *Entity* Accept the prompted Entity

Always check the Entity is correct, to ensure the matter is attached to the correct entity.

Note that at this stage the matter will be registered for the Lewisham Reid Entity. If you select another Entity, the screen colour will change.

Once a matter is opened it is not possible to move a matter from one entity to another.

20. *Source Country* Accept the default

The Country is the home country of the client.

“Financial” tab

21. Select the “Financial” Tab

22. *Expected Value* 2500

If an Expected value has been recorded for this Matter Type, Lexis Affinity will prompt with this value. You can alter this if required.

This is the estimated fees expected to be billed on this matter.

23. *Fee Rate Code* Leave blank

A Fee Rate Code can be set for specific clients and/or matters.

If a Fee Rate Code has been recorded for this Matter Type, Lexis Affinity will prompt with this Fee Rate Code. You can select another Fee Rate Code if required.

24. *Fee Template Group* Leave blank

A Fee Template Group is made up of two or more Fee templates which are used to charge a specific amount for a particular type of work.

25. *Matter Budget – Fees* 2000

26. *Matter Budget – Disbursements* 500

27. *Matter Budget - Overall Limit* 2500

These are the limits that you expect this matter to reach.

The Overall Limit is the maximum that the firm is prepared to carry for a matter for the total of WIP + Debtors less money in trust.

28. *Trust Bank* Select TA or click on the binoculars

If your Firm or Branch has more than one Trust Bank Account, select the bank account to be used for this matter.

29. *Authority* Tick this

This indicates that you have a Trust Authority from the client for this matter. If a Trust Account Authority is received after the matter is created, you can edit the matter and tick this field.

30. *Internal Trust* Accept the prompted "Not Internal Trust Matter"

This is used for creating Matters for Trust to Office Transfer, Statutory Deposit and Bank Account Adjustment accounts.

31. *Send Trust Statement* Tick this

This indicates this matter will be included when printing Trust Statements from Reports.

32. *Unit / Minute Options when submitting Fee Sheet* Accept the default

Note that this option is only accessible if the Employee has been granted access.

"Rates" tab

A rate entered here overrides the hourly rates for individual fee earners.

If the Hourly rate is \$150.00, then all work done on this file is charged at \$150.00 per hour, regardless of the Employee who did the work.

If the Hourly rate is left blank or is \$0.00, the standard fee earner rates will apply.

If the Hourly rate is set between \$0.01 and \$4.99, Lexis Affinity will assume this is a percentage and apply it to the Hourly rate of the Employee.

33. Select the "Add Rate" tab

34. *Rate* 150

35. *Commence* Enter today's date

36. *Expires* Tick this and enter the last day of the current financial year

37. Click on **[Add]**

38. Select the "Rates" tab


The rate displays.

“Contacts” tab

39. Select the “Contacts” Tab

40. *Bill To* Click on  and select Lanes Motors

This is the primary Billing party.
Multiple Billing Parties are handled at the Billing stage.

41. *Contact* Click on  and select the Business Contact you registered earlier (in this example Bannister_Construction Co)

42. *Referred By* Leave blank

You can use this field to record a party who referred this matter to you.
This is an optional field.

43. *Bill To Contact* Select HField_Lanes Motors

When selecting the Bill To Contact, Lexis Affinity will display a list of PhoneBook records that have been flagged on the “Relationships” tab as being a “Debtor Contact for” (or where System Role = Debtor Contact).

“Miscellaneous” tab

44. Select the “Miscellaneous” tab

45. *Workflow* Select COMMERCIAL

A Workflow procedure is a set of predefined steps that must be performed to complete this matter.

46. *emPower* Leave blank

If your firm uses emPower, this is used to select a set of precedents.

47. *Client Role* Select Lessor

This may be an optional field in your dataset.

48. *Expected Completion* 22/12/YYYY

Enter this date with a relevant year or make your own date.
This is an optional field.

49. *Final Bill / Hold Processing* Check Normal Processing

You can check other options as appropriate.

Normal Processing	no restrictions are applied.
Final Bill Warning	a warning is displayed when processing fee, sundry or cheque entries.
Hold New Time / Disbursements Registration Hold	stops processing of Fee entries, Sundry Expenses, Cheque Requests and Cheques the matter is created, but processing is prohibited until the matter has been cleared. (It is possible to have the Security Setting so that this happens by default for certain users.)

50. Tick any of the following if they apply to this matter.

Agency	For matters where your Firm acts as agent.
Speculation	For “No Win – No Pay” matters.
Litigation	For grouping all litigious matters.
Gratis	For matters where there will be no fees billed.
Event	For marketing matters.
Suppress Detail in Conflict Search	To omit the Matter Description detail from the Conflict Check Report.

“Team” tab**Adding a Team to a Matter**

Teams are created in Team Registration by your Lexis Affinity System Administrator. A Team can be attached to a matter and then additional employees can be added to the team for that matter only.

51. Select the “Team” Tab

52. *Team* Tick Admin Team

The names of the members display.

To add another member to the Matter Team53. Click on **[Add]**54. Click in the *Employee Name* field

55. Click on the down arrow in the field and select DD – David Drew

56. Click in the *Role* field

57. Click on the down arrow and select Junior Solicitor

“Billing” tab

58. Select the “Billing” Tab

59. *Billing Plan* Accept NPL (No Plan)

A Billing Plan can be used when processing Bills using Auto Billing.

60. *Billing Trigger* Leave blank for this exercise

Billing Trigger applies to Billing Plans that are based on a value.

61. *Billing Template* Accept the prompted template

The Bill Template determines the format of the Bill produced for this matter.

62. *Tax Status for New Bills* Accept “Taxable Bill”

63. *Default Scale Costed Fees on Bill for New Bills* Leave unticked for this exercise

64. *Non-Billable WIP* Leave unticked for this exercise

65. *Apply Sundry at Time of Billing* Leave blank for this exercise

66. *Apply Discount Rate at Time of Billing* Leave blank for this exercise

67. *Matter has Multi Party Bills?* Leave unticked for this exercise

“Collection” tab

68. Select the “Collection” Tab

69. *Collection Plan* Accept the default

70. *Exclude new Bills from Debtors Letters?* Leave unticked

71. *Exclude New Bills from Account Rendered Statements* Leave unticked

72. *Trust Funds upfront* 500.00

If an amount is inserted, a letter to the client can then be produced, confirming acceptance of the instructions and asking for money before work commences.

73. *Send Follow up letters for Instructing Letter* Leave unticked for this exercise

If you have requested Trust Funds Upfront, you can also select to produce follow-up letters if the amount is not received.

74. *Attach Pre-Agreed Payment Plan* Leave unticked

A Payment Plan is a method of allowing and following up instalment payments of bills.

If you tick this option, another vertical tab displays allowing you to select the payment plan you want to attach to this matter. You can also alter the structure of the payment plan.

75. *Print Label* leave unticked for this exercise

76. Click on **[OK]**

A message will display, advising the Matter Number that has been allocated.

77. Click on **[OK]**

The Workflow procedure will run.

A prompt will display asking if you wish to print the Instructing Letter.

78. Click on **[No]**

If you have selected to print a label, the Print Label dialog box will display.

Complete this and the label/s will print to the screen.


Click on **[Close]** to close the print display

8.2 Diary Entry for a Matter



Hands on

In this exercise you will record a Diary Entry for the matter you have just created and book a Meeting Room.

1. Select the “Matters” tab on the Client screen
2. Locate and open the matter you have just created
3. Select the “Diary” tab
4. Click on **[New]** to add a new Diary Entry.
5. *Date* accept the date
6. *Start* Add 20 minutes to the prompted Start Time
7. *End* Accept the promoted End Time
8. *Matter* Accept the prompted Matter
9. *Reminder For* YSR
10. *Event* Meeting
11. *Location* Our Office
12. *Jurisdiction* Leave Blank
13. *With* Click on  to find your name (ie the Business Contact you registered)
14. *Description* “To discuss lease arrangements for Lanes Motors”
15. *Print Description on Event Report?* Tick this
16. *Notify minutes before appointment?* Tick this and accept 15 minutes

Attaching a Resource

17. Select the “Resources” tab
18. Click on **[Add]**
19. *Type* Select Meeting Rooms and select Meeting Room 1
20. Click on **[OK]** to attach the resource
21. Click on **[OK]** to update the diary entry

8.3 Adding Contacts



Hands on

In this exercise you will add Lanes Motors as a contact and H Field as an 'Other Party' contact for this matter.

1. Select the "Contacts" tab

Lexis Affinity has automatically linked the Matter Bill To, Matter Bill to Contact, Matter Client and Matter Contact. You can add any number of "Other" Contacts.

2. Click on **[New]** to open the Matter / Other Party dialog box
3. *Type (PhoneBook Group)* Select Other Party from the drop down list
4. *Role* Select Lessee

Roles are created to classify the additional contacts that you add to a matter.

5. *PhoneBook Search* Click on **[Binoculars]** to open the PhoneBook list
6. Clear the filter
7. Select Lanes Motors
8. *Reference* Leave blank for this exercise

This field is used to further define the contact.

9. *Batch Mode* Leave unticked for this exercise

When adding Contacts, you can tick "Batch Mode" and select multiple entries from the PhoneBook listing using <CTRL + click>.

10. Click **[Add]**

Repeat these steps to add HField_Lanes as the Other Party Contact.

11. *Type (PhoneBook Group)* Select Other Party from the drop down list
12. *Role* Select Other Party Contact
13. *PhoneBook Search* Select HField_Lanes Motors

14. *Reference* Leave blank for this exercise
15. Click on **[Add]** to update this record
16. Close the Matter Screen



TIP: You can send an email to the contacts on a matter by selecting the contact/s and right clicking on the selection. Select "Email" from the menu.


8.4 Copy Matter

If there is a new matter to register for a Client and that matter is similar in many ways to an existing matter, the Matter Copy function can be used.

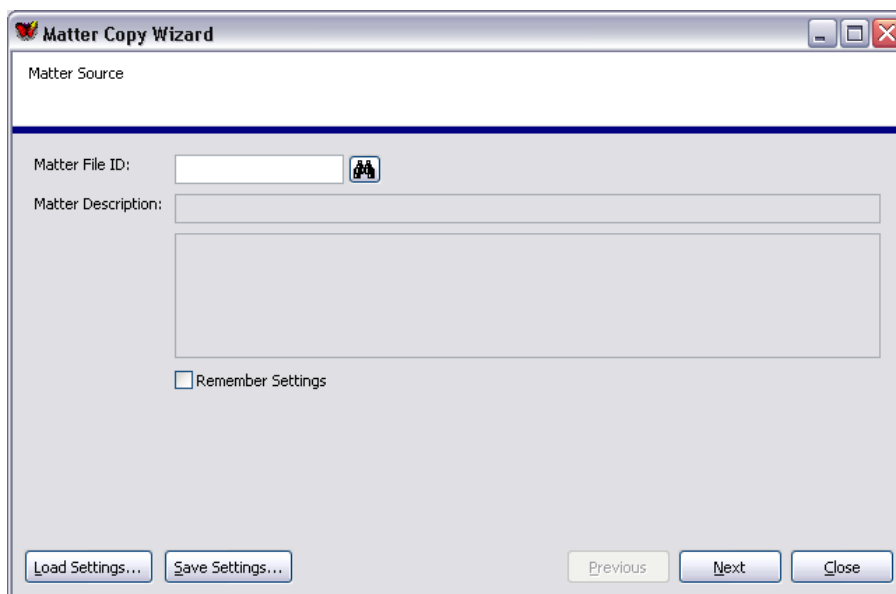


Hands on

In this exercise you will register another matter for the Construction Company – a lease of 810 George Street to Axia Insurance Pty Ltd, based on the matter just registered.

1. Open the Construction Company client
2. Click on **[New Matter]**
3. Click on  **[Matter Copy]**

The following screen displays:

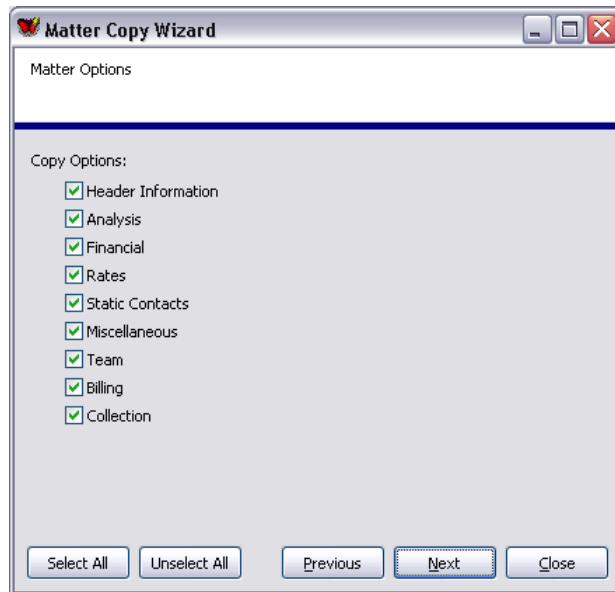


4. *Matter File ID* Enter the matter number of the matter you have just created or click on **[Binoculars]** to select another matter

The Client Name, Matter Description and Long Description will display.

5. Click on **[Next]**

The Matter Options | Copy Options screen will display:

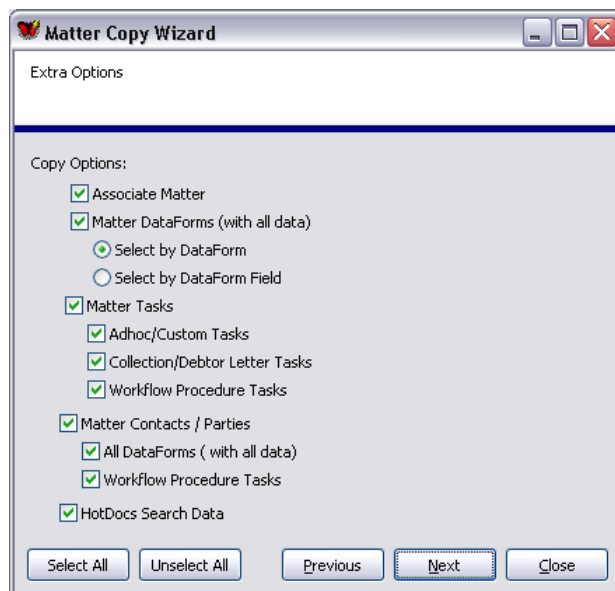


6. Untick Analysis and Static Contacts

Ticking an option here does not force you to retain that information on the new matter. It simply means that the information will be automatically populated and can then be modified.

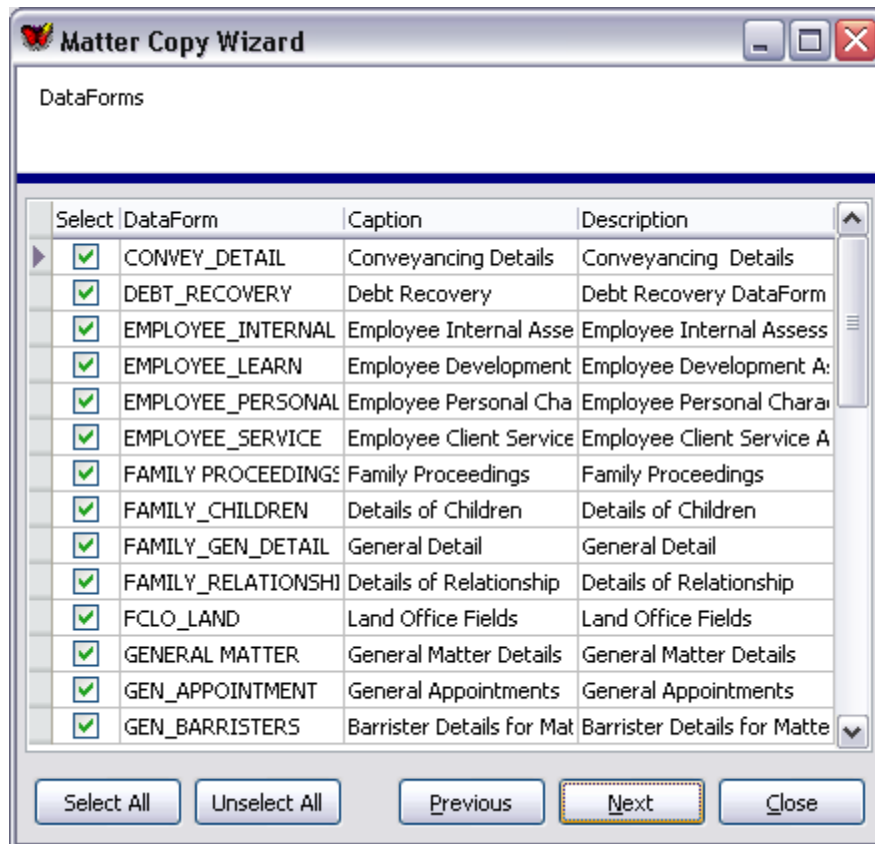
7. Click on **[Next]**

The Extra Options | Copy Options screen will display:



8. Untick Associate Matter and HotDocs Search Data
9. Click on **[Next]**

If DataForms have been included the following screen will display:



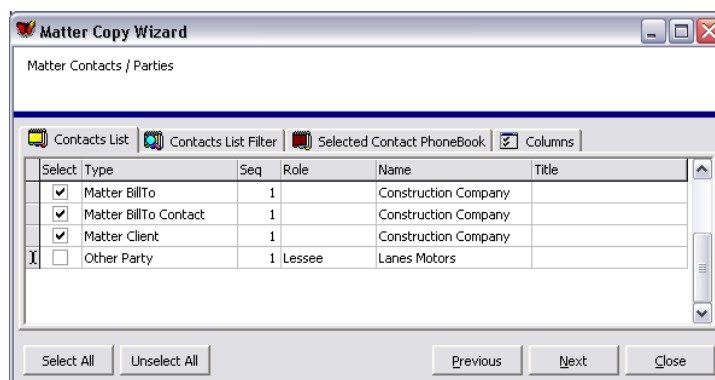
10. Select the DataForms to be included

Use **[Select All]** to include all DataForms.

Use **[Unselect All]** to untick all DataForms.

11. Click on **[Next]**

A list of Contacts displays, similar to the following.



12. Click on **[Unselect All]**

In this case no contacts will be attached to the new matter

13. Click on **[Next]**

The new matter will be displayed on the screen.

14. Amend the Short and Long Description fields to include that the lease is for Axia Insurance
15. Select the “Contacts” tab
16. *Bill To* Click on **[Binoculars]** and select Axia Insurance
17. *Bill To Contact* Click on **[Binoculars]** and select Bailey_Axia

NOTE: Alpha ID is not copied.

18. Click on **[OK]** to create the matter

Matter Copy – Contacts option

Contacts List

This list displays all PhoneBook records that are recorded on the master matter.

Contacts List Filter

Use the Filter to refine the “Contacts List”.

Selected Contact PhoneBook

This screen will display the details of the PhoneBook that is selected on the “Contacts List” tab.

Columns

Select this tab to select which columns display on the “Contacts List” screen.


8.5 Associating Matters

You can use Associate Matters to link two or more matters.

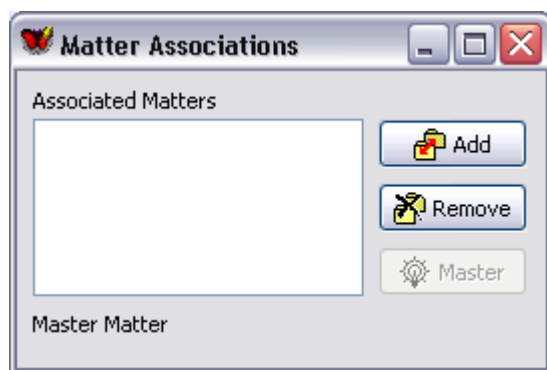


Optional Exercise

In this exercise you will associate the 2 matters for Walter Turnbull Advertising.

1. Open the Client list
2. Open the Client Walter Turnbull Advertising
3. Select the “Matters” tab
4. Open Matter 990058
5. Click on  to open the Matter Associations Dialog Box

The Screen is displayed below:



6. Click on **[Add]**

The Matter Selection list displays.

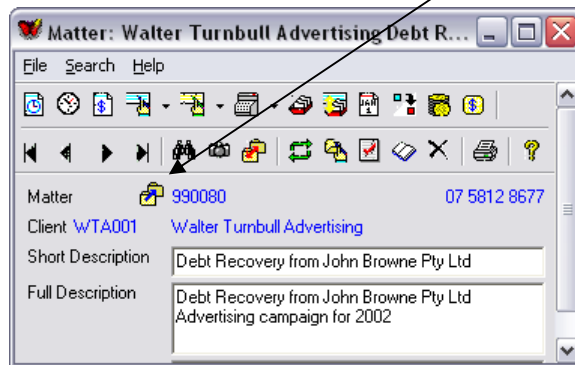
7. Locate Matter 990080
8. Double click

This will add matter 990080 to the list of Associated Matters.

You can continue to add to the list of Associated Matters.

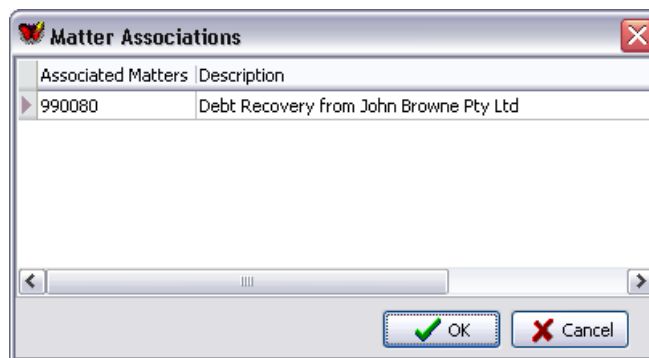
9. Close the Matter Associations dialog box
10. Close the Matter

11. Open Matter 990080 and note the link icon next to the Matter Number



12. Click on the link icon

The Matter Associations list will display:



You can double click on the matter to open the matter.

13. Close the Matter

8.6 Altering the Debtor Contact

A PhoneBook record can be attached to a Bill as the Bill To Contact. If the person who has been selected as the Bill to Contact is no longer the contact (for example leaves the employ of the Client) and a new person takes over that role, this change needs to be reflected in the database and the Bill to Contact needs to be reassigned.

The “Transfer Debtor Contact” procedure is an easy way to change all or multiple instances of this situation.



Hands on

In this exercise you will remove John W Carey as the Debtor Contact for Blackwell Scientific Publications. The new Debtor Contact is Helen Sinclair.

To check the existing Debtor Contact

1. Open Matter 990155, select the “Bills” tab, Open B 467

Note the Contact is Carey_Blackwell Scientific.

2. Close the Bill screen

To Transfer the Debtor Contact

3. Click on the Client icon
4. Click on the PhoneBook icon
5. Select the “Relationships” tab
6. Locate and double click Sinclair_Blackwell Scientific

The PhoneBook screen for Helen Sinclair displays.

7. Select the “Relationships” tab

Note that Helen Sinclair is an employee of Blackwell Scientific Publications.

8. Click on **[New]**

The following screen displays:

Relationship definition

PhoneBook entry: Sinclair_Blackwell Scientific

Relationship: [Empty dropdown]

System Role: N/A

Relate to: [Binoculars icon]

System Role: N/A

Buttons: Clear, OK, Cancel

9. *Relationship* Select 'is a debtor contact for'
10. *Relate to* Click on **[Binoculars]** and locate Blackwell Scientific Publications
11. Click on **[OK]**

The "Relationships" tab indicates that this PhoneBook record is now also a Debtor Contact for Blackwell Scientific Publications

PhoneBook: Sinclair_Blackwell Scientific

File Search Help

SurName_Bus: Sinclair_Blackwell Scientific Code: ID: 326 Main/Work Phone: 07 3590 9876

Company Name: Blackwell Scientific Publications Facsimile: 07 3590 9767

Correspondence Name: Mrs Helen M Sinclair Mobile:

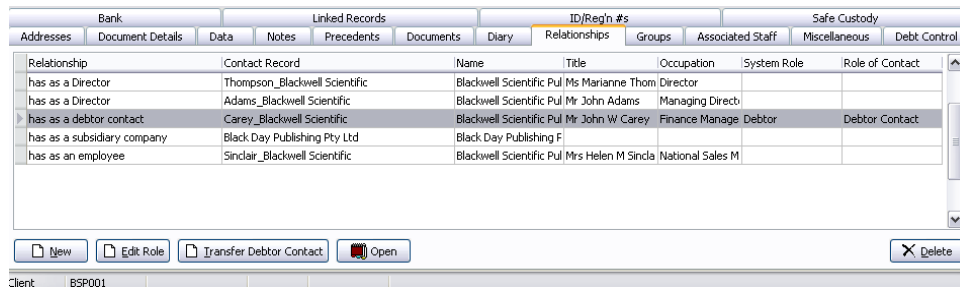
Position: National Sales Manager Home Phone:

Full Company Name: Blackwell Scientific Publications Direct/Other:

Relationship	Contact Record	Name	Title	Occupation	System Role	Role of Contact
is a debtor contact for	Blackwell Scientific Publications	Blackwell Scientific Pul			Debtor Contact	Debtor
is an employee of	Blackwell Scientific Publications	Blackwell Scientific Pul				
is the same person as	Sinclair, Helen Margaret	Mrs H M Sinclair				

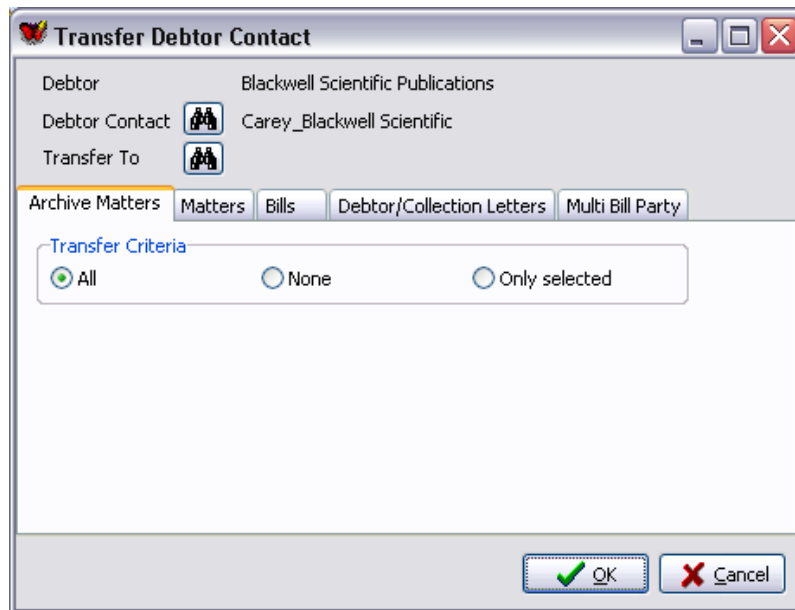
Buttons: New, Edit Role, Transfer Debtor Contact, Open, Delete

12. Double click the Blackwell Scientific Publications line to open the PhoneBook record
13. Select the "Relationships" tab
14. Highlight Carey_Blackwell Scientific



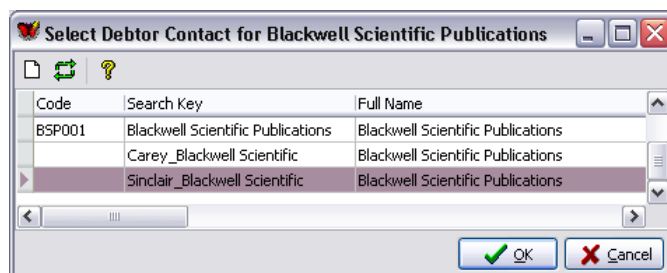
15. Click on **[Transfer Debtor Contact]**

The following screen displays:



16. Transfer To Click on **[Binoculars]**

17. Highlight Sinclair_Blackwell Scientific Publications



18. Click on **[OK]**

You are able to transfer the Debtor Contact on:

- Archived Matters
- Matters
- Bills
- Debtor/Collection Letters
- Multi Party Bills

You can select from All, None or Only Selected

If you choose “Only Selected”, Lexis Affinity Library will display a list of records, from which you can choose.

The default setting for each type is “All”

On the “Archive Matters” tab

19. *Transfer Criteria* Select None

On the “Matters” tab

20. *Transfer Criteria* Select All

On the “Bills” tab

21. *Transfer Criteria* Select Only Selected

A grid displays similar to the one below:

Transfer Debtor Contact

Debtor: Blackwell Scientific Publications
 Debtor Contact: Carey_Blackwell Scientific
 Transfer To: Sinclair_Blackwell Scientific

Archive Matters | **Matters** | Bills | Debtor/Collection Letters | Multi Bill Party

Transfer Criteria:
 All None Only selected

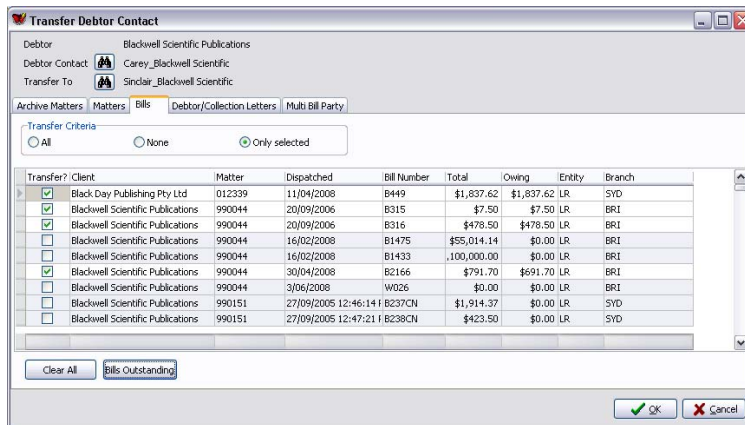
Transfer? (Client)	Matter	Dispatched	Bill Number	Total	Owing	Entity	Branch
<input type="checkbox"/> Black Day Publishing Pty Ltd	012339	11/04/2008	B449	\$1,837.62	\$1,837.62	LR	SYD
<input type="checkbox"/> Blackwell Scientific Publications	990044	20/09/2006	B315	\$7.50	\$7.50	LR	BRI
<input type="checkbox"/> Blackwell Scientific Publications	990044	20/09/2006	B316	\$478.50	\$478.50	LR	BRI
<input type="checkbox"/> Blackwell Scientific Publications	990044	16/02/2008	B1475	\$55,014.14	\$0.00	LR	BRI
<input type="checkbox"/> Blackwell Scientific Publications	990044	16/02/2008	B1433	\$100,000.00	\$0.00	LR	BRI
<input type="checkbox"/> Blackwell Scientific Publications	990044	30/04/2008	B2166	\$791.70	\$691.70	LR	BRI
<input type="checkbox"/> Blackwell Scientific Publications	990044	3/06/2008	W026	\$0.00	\$0.00	LR	BRI
<input type="checkbox"/> Blackwell Scientific Publications	990151	27/09/2005 12:46:14	B237CN	\$1,914.37	\$0.00	LR	SYD
<input type="checkbox"/> Blackwell Scientific Publications	990151	27/09/2005 12:47:21	B238CN	\$423.50	\$0.00	LR	SYD

Clear All Bills Outstanding

OK Cancel

22. Click on **[Bills Outstanding]**

The grid changes to select only those bills that are still outstanding.



On the “Debtor / Collection Letters” tab

23. *Transfer Criteria* Select All

On the “Multi Bill Party” tab

24. *Transfer Criteria* Select Only selected

A grid will display showing any multi bill party records. There are none for this Debtor Contact

25. Click on **[OK]** to process the transfer.

The PhoneBook record for Blackwell Scientific Publications will display.

26. Click on the Client icon

27. Select the “Matters” tab and open matter 990155

28. Select the “Bills” tab

29. Open B 467

Note the Contact is now Sinclair_Blackwell Scientific.

30. Close the Bill screen

31. Select the “Contacts” tab

Note Sinclair_Blackwell Scientific is now listed as a Matter Bill To Contact and has a Seq (Sequence) number 2.

If a new bill is created Sinclair_Blackwell Scientific will be the default Contact.

The record for Carey_Blackwell Scientific is displayed as there are records attached to Carey_Blackwell Scientific that were not transferred.

8.7 Display Matter

There are two ways to access an existing matter:

- Click on the Matter icon on the Applications Toolbar and then double-click the matter from the list

OR

- Click on the Client icon on the Applications Toolbar and select the client. Click on the “Matters” tab if the matters are not already displayed, and then double-click on the matter.

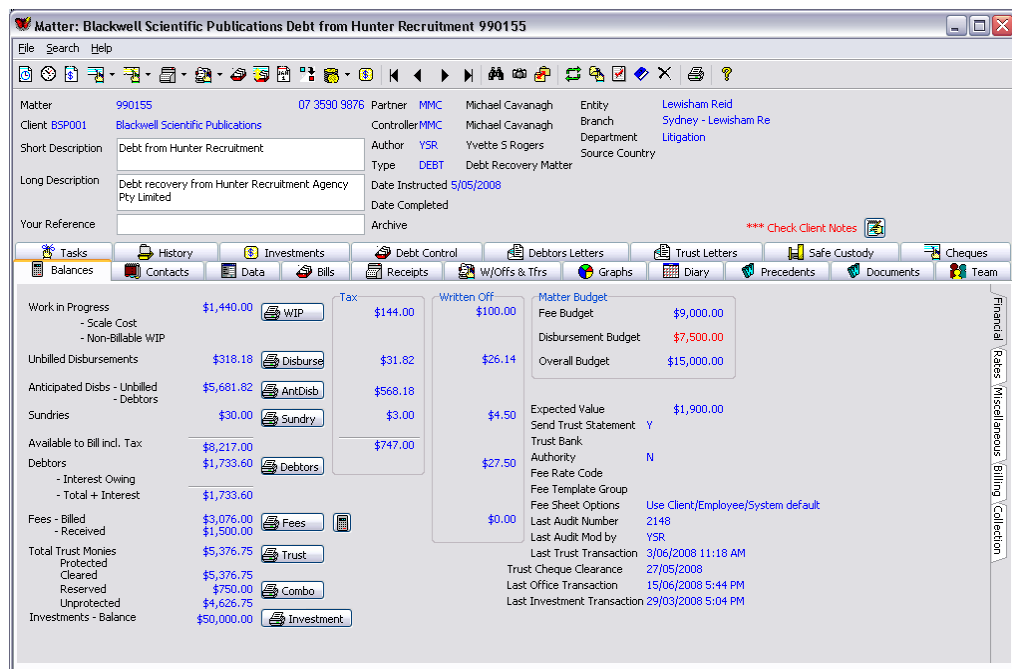


Hands on

In this exercise you will display an existing matter and examine the information available for that matter.

1. Select Matters from the Application toolbar
2. *Search for File* 990155 <ENTER>
3. Select the “Balances” tab

The Matter screen similar to the one below is displayed.



Matter: Blackwell Scientific Publications Debt from Hunter Recruitment 990155

File Search Help

Matter: 990155 07 3590 9876 Partner: MMC Michael Cavanagh Entity: Lewisham Reid
 Client: BSP001 Blackwell Scientific Publications Controller: MMC Michael Cavanagh Branch: Sydney - Lewisham Re
 Short Description: Debt from Hunter Recruitment Author: YSR Yvette 5 Rogers Department: Litigation
 Long Description: Debt recovery from Hunter Recruitment Agency Pty Limited Date Instructed: 5/05/2008
 Your Reference: Archive Date Completed: Source Country

*** Check Client Notes

Tasks History Investments Debt Control Debtors Letters Trust Letters Safe Custody Cheques
 Balances Contacts Data Bills Receipts W/Offs & Trfs Graphs Diary Precedents Documents Team

Work in Progress	\$1,440.00	WIP	Tax	\$144.00	Written Off	\$100.00	Matter Budget	\$9,000.00
- Scale Cost							Fee Budget	\$7,500.00
- Non-Billable WIP							Disbursement Budget	\$15,000.00
Unbilled Disbursements	\$318.18	Disburse		\$31.82		\$26.14	Overall Budget	\$15,000.00
Anticipated Disbs - Unbilled - Debtors	\$5,681.82	AntDisb		\$568.18			Expected Value	\$1,900.00
Sundries	\$30.00	Sundry		\$3.00		\$4.50	Send Trust Statement	Y
Available to Bill incl. Tax	\$8,217.00			\$747.00		\$27.50	Trust Bank	
Debtors	\$1,733.60	Debtors					Authority	N
- Interest Owing							Fee Rate Code	
- Total + Interest	\$1,733.60						Fee Template Group	Use Client/Employee/System default
Fees - Billed	\$3,076.00	Fees				\$0.00	Fee Sheet Options	2148
- Received	\$1,500.00						Last Audit Number	YSR
Total Trust Monies	\$5,376.75	Trust					Last Audit Mod by	YSR
Protected	\$5,376.75						Last Trust Transaction	3/06/2008 11:18 AM
Cleared	\$750.00	Combo					Trust Cheque Clearance	27/05/2008
Reserved	\$4,626.75						Last Office Transaction	15/06/2008 5:44 PM
Unprotected	\$4,626.75						Last Investment Transaction	29/03/2008 5:04 PM
Investments - Balance	\$50,000.00	Investment						

4. Select each tab as instructed

The information contained in each of the tabs is described in the following section.

8.8 Matter Fields

- Matter** The Matter ID is generated in accordance with the Matter Code Rules. The Lewisham Reid training dataset uses a 6 digit Matter Number. If you enter Matter IDs manually, you should avoid using symbols such as: \ / : * ? " < > |
Refer to the Administrator Workbook | Code Rules for more information.
- Work Telephone Number**
This is displayed to the right of the Matter Number.
- Client** The Client Code & Name.
- Short Description**
The Short Description of the matter appears on Lexis Affinity Reports.
- Long Description**
The Long Description can be used in correspondence and Bills.
- Your Reference** (30 characters)
The Reference the client has advised when instructing the firm. This would usually be included in all the documentation to the client.
- Partner** This is the Partner in charge of the matter (ie the highest level of responsibility). When creating a new matter, Lexis Affinity defaults to the Partner who manages that Client.
- Controller** This is the Controller in charge of the Matter (ie the second highest level of responsibility). When creating a new matter, Lexis Affinity defaults to the Partner who manages that Client.
- Author** This is the Author who is handling this matter. When creating a new matter, Lexis Affinity defaults to the Partner who manages that Client.
NOTE: Employees must be flagged as Partners/Controllers/Authors when registered and only those flagged will be listed in the drop down lists.
- Type** This is the field of law or type of work for this matter.
- Date Instructed**
This is the date the matter was first initiated.
- Date Completed**
If this matter is closed, this is the date the matter was completed. You can edit this matter and complete this field to close a Matter. This field is not available when creating matters.

Archive Store number if this matter has been previously archived.

Entity Indicates the Entity to which this matter belongs.

Branch Indicates the Branch to which this matter belongs.

Department Indicates the Department to which this matter belongs.

Source Country
The home country of the client.

8.9 Matter Tabs

The tabs that are displayed may vary from one Employee type to another. Permissions to display the tabs is set in Security Options for each Employee Type.

8.9.1 “Balances” tab

There are five vertical tabs on the right hand side of the Window – Financial, Rates, Miscellaneous, Billing and Collection.

“Financial” tab

Displays all balances for this matter. You can display the transactions that make up each balance by clicking on the buttons beside each balance – for example to view the disbursement transactions, click on **[Disburse]**

Even though the balance may be zero, there may still be transactions.

Work in Progress

This balance and ledger will display the unbilled Fee entries that have been recorded on the matter. Details displayed include; the date, the author, a Fee Summary and a Fee Types Summary.

Work in Progress – Scale Cost

This is the value of the unbilled Scale Costs recorded on the matter.

Work in Progress – Non-Billable WIP

This is the value WIP that has been recorded as Non-Billable.

Unbilled Disbursements

The balance is the unbilled paid disbursements – ie Cheques drawn and Invoices recorded against a Creditor and Petty Cash Journals.

The ledger can be printed for only unbilled disbursements, and for set or specified date ranges.

Anticipated Disbursements – Unbilled

The balance is the total of unbilled Cheque Requisitions, where the “Anticipated Disbursement” field is ticked.

The ledger includes both billed and unbilled Anticipated Disbursements, can be printed for one or all Authors (“Requested by”) and can be printed for set or specified date ranges.

Anticipated Disbursements – Debtors

The balance is the total of billed Cheque Requisitions, where the “Anticipated Disbursement” field is ticked.

Sundries

The balance is the total of unbilled Sundry Expenses recorded against this matter.

The ledger can be printed for only unbilled sundries, and for set or specified date ranges.

Available to Bill incl Tax

This is the total that would appear on a bill, if prepared now.

Debtors

The balance is the billed amounts owing on this matter.

The ledger can be printed for a set or specified Date Range and will include bills, payments received and write off entries.

Debtors – Interest Owning

This is the amount of interest that is due on this matter.

Debtors – Total + Interest

This is the total of the amounts billed + the interest accumulated.

Fees – Billed The balance is the total of the Fees that have been billed for this matter.

The ledger can be printed for:

set or specified date ranges

all Fee entries (billed and unbilled [WIP]), WIP, generated and billings (billed)

Entries which are positive only, negative only or zero value

by Partner, Author or Fee Type.

You can print the fees in the order of the billing date and you can File Notes.

Fees – Received

The balance is the total value of the Fees that have been received.

Trust

The ledger can be printed:

- for set or specified date ranges
- by Created date or System Date
- in ascending or descending order
- for one or all Trust Bank accounts
- including or not including Reserved Trust entries
- with or without Transit Register entries

If you are operating more than a single trust bank account, each bank will be listed separately.

You can also print an individual Trust Statement.

Total Trust Monies

The balance is the total of the Trust Funds for this matter.

Total Trust Monies – Protected

The balance is the total of the Trust Funds that are flagged as “Protected” – ie banked for a specific reason – such as Barristers Fees.

Total Trust Monies – Cleared

The balance is the total of the Trust Funds that are flagged as “Clear” – ie they have been banked and the required number of days for the funds to be cleared by the bank.

Total Trust Monies - Reserved

The balance is the amount of the Trust Funds that have been assigned as a notional transfer as part of a bill or Cheque Request but have not yet been transferred to office.

Total Trust Monies – Unprotected

The balance is the total of the Trust Funds that are available – ie not Protected or Reserved.

Combo

The combined ledger can be printed for set or specified date ranges. In “Expanded” format prints Disbursements, Tax on Disbursements, Billed amounts, Trust Debits, Credits and running balance; a Trust Summary by Bank Account, a Fee Summary by Author; a Sundry Summary and Investment Summary.

Not Expanded format: - options include to “Print Fees”, to “Wrap the descriptions” (this will print the full details of fee entries) and to exclude tax from fees, sundries anticipated disbursements and disbursements.

With either format you can select to print only unbilled items and to exclude reversals.

Investments – Balance

The balance is the total of the Invested funds.

The Investment Ledger allows you to select the following options:

the selected matter or an Investment
set or specified date ranges
by Created date or System Date
in ascending or descending order
including or not including Reversal entries
including some optional details.

Tax

This is the GST that will be added when the matter is billed.

Written Off

This shows the amounts that have already been written off.

Matter Budget / Fees / Disbursement / Overall Budget

These are the estimates that are entered when the matter is created.

Fees

If the setting in System | Posting (*Alert User when Matter Balance exceeds – Fees Budget*) is ticked, a warning will be displayed when the Total Fees (excluding Tax) exceeds 80% of the Fee Budget.

Disbursements

If the setting in System | Posting (*Alert User when Matter Balance exceeds – Disbursement Budget*) is ticked, a warning will be displayed when the Total Disbursements (billed and unbilled including anticipated disbursements & sundries – excluding tax) exceed 100% of the Disbursement Budget.

Overall Budget

If the setting in System | Posting (*Alert User when Matter Balance exceeds – Total Budget*) is ticked, a warning will be displayed when the total of Fees and Disbursements exceed 100% of the Overall Budget.

If these amounts have been exceeded, they are displayed in red.

You can print a Matter Credit Limit Report for details on matters that are close to the limits.

Expected Value

This is the Estimated Fees quoted to the client.

The value is reported in the Matters Opened Report.

Send Trust Statement

Y displays if this was ticked when the matter was created and indicates that this matter will be included when printing Trust Statements from Reports.

Trust Bank

If the matter is restricted to a Trust Bank Account, it will be indicated here.

Authority

This indicates if a Trust Authority has been received from the client.

Fee Rate Code

This indicates the Fee Rate Code attached to this matter, if applicable.

Fee Template Group

This indicates the Fee Template Group that is attached to this matter, if applicable.

Fee Sheet Options

This indicates the method of rounding units on submitted fee sheet entries.

Last Audit Number / Mod By

This is an internal record, identifying who last edited this matter.

Last Trust Transaction

The Date and Time of the last Trust Transaction.

Trust Cheque Clearance

The clearance date of the last trust cheque receipt.

Last Office Transaction

This is the date and time of the last office transaction recorded on the matter.

Last Investment Transaction

This is the date and time of the last Investment transaction recorded on the matter.

NOTE: There are various printing options within each ledger selection. These will be covered in more detail in the Operations Workshop.

“Rates” tab

Rate These are the Rates that are attached to this matter.

“Miscellaneous” tab**Workflow Area Code / Name**

This shows the Code / Description of the Workflow Area for this matter.

Expected Completion

This shows the expected Completion Date of this matter.

Alpha ID This shows the Alpha ID of the matter, if one is registered.

Type of Work This shows if this matter has been flagged as Agency, Speculation, Litigation, Gratis or Event.

Notes This displays any Notes that have been recorded for this matter. (3000 characters.)

“Billing” tab

Bill Template This shows the Bill template that has been attached to this matter.

Billing Plan This shows the Billing Plan that has been attached to this matter.

Tax Status for New Bills

This shows the default prompt for a new bill.

Default Scale Cost Fees

This shows the default for billing by Scale Cost.

Non-Billable WIP

If ticked, the WIP recorded to the matter will be classed as Non-Billable.

This WIP can be altered to Billable via Fee Revaluation or when editing a bill before it is posted.

“Collection” tab

Collection Plan

This shows what Collection Plan has been assigned to this matter

Exclude New Bills from Debtors Letters?

This shows whether or not the amount due for new bills will be included in the total amount owing on a Debtors letter.

Exclude New Bills from Accounts Rendered Statements?

This shows whether or not the amount due for new bills will be included in the total amount owing on an Accounts Rendered Statement.

Trust Funds Up Front

This shows any money that has been received as up-front trust funds. (You must have sent the letter requesting funds up front and marked the receipt as such).

Send Follow up Letters for Instructing Letter

This indicates whether or not there should be a follow up letter issued if the client does not pay the funds requested in the initial / confirmation letter.

Attach Pre-Agreed Payment Plan?

Tick this to invoke the “Payment Plan” tab. From this tab you can select a Payment Plan and update/review the schedule of payments..

Collection Notes

This will list any notes made in relation to debt collection.

New notes may be added here. You can also print the notes.

8.9.2 “Contacts” tab

This tab displays a list of contacts for the matter and the type of contact. From here you can add new contacts, edit the existing contacts, delete contacts, print the list of contacts, open the PhoneBook entry for the contact, open the Matter Contact relationship, generate a precedent to one or more of the contacts or displays the DataForm/s for all the matter contacts in a grid view.

8.9.3 “Data” tab

The left hand side shows the Data Forms that are attached to this matter. When you select a Data Form the details of the additional information (the DataForm Fields) is displayed on the right.

8.9.4 “emPower” tab (optional)

If your Firm is using the *emPower* precedents and an *emPower* precedent module has been attached to the matter, Lexis Affinity will display the precedents relating to the matter type. From here you can run the data forms and enter the extra information required before merging documents.

8.9.5 “Bills” tab

This tab displays bills, Write offs and Credit Notes on a matter, including draft bills. Information includes bill number, currency if the bill was raised in an alternate currency, fees and disbursements billed and balance outstanding.

You can use the scroll bar to view additional columns of information not in the current view.

8.9.6 “Receipts” tab

This tab displays all receipts, both office and trust, processed on this matter and any adjustments that may have been made affecting those receipts.

If a transaction is reversed the original entry is displayed in **Green** and the reversal entry is displayed in **Red**.

Debtor adjustment entries are shown in **Blue**.

Any Cheque drawn from a matter and allocated to Debtors will be shown here as a Debit entry, marked “RF” (Refund).

8.9.7 “Write Offs and Transfers” tab

This tab displays the Debtors Write Off journals, Debtor / Disbursement journals and Trust to Office transfers in payment of bills on the matter.

8.9.8 “Graphs” tab

Two graphs appear in this tab:

\$ Fee Distribution:

Details the distribution of the \$value of the time worked on the matter by employee.

Time Units Distribution:

Details the distribution of number of units worked on the matter by employee.

8.9.9 “Diary” tab

Displays all the Diary entries on this matter.

You can use this tab to create a new Diary entry or edit an existing entry for a Matter.

8.9.10 “Precedents” tab

The left hand side of the display shows the Precedent Categories that are available. You can generate new documents from this tab.

8.9.11 “Documents” tab

This will display a list of documents that have been generated for this matter.

You can open or edit existing documents or delete documents from this tab (provided you have the correct security).

You can use the “Filter” to refine your search of the documents and the “Column” tab to alter the display.

8.9.12 “Team” tab

This shows the members of the “Team” of Employees who are involved in this matter.

You can edit the Team – ie add or remove members.

You can also open Batch Update Matter Teams from this tab, which allows you to update multiple matters with the same team members at the same time.

8.9.13 “Tasks” tab

This displays all the tasks to be completed or that have been completed for this matter. Tasks can be created or deleted from this tab.

You can use the “Filter” to refine your search of the Tasks, the “Options” tab to hide certain tasks, the “Column” tab to alter the columns included and their order, and the “Sort” tab to re order the entries.

8.9.14 “History” tab

This tab will show any details of Box number and Archive retrieval / request information and movements if a matter has previously been Archived and subsequently reinstated as a current matter.

This information is the same as the “Archive” tab on the Archived matter record.

8.9.15 “Investments” tab

This tab shows Investments for this matter. You can also add a new Investment, open an existing investment, process an Investment Journal or print details of an Investment.

You can choose to only view investments that have a balance by ticking “Exclude Zero balance Investments”.

8.9.16 “Debt Control” tab

This tab contains a list of Bills and the “Bill to” party that are outstanding for this matter. The lower section of the screen has vertical tabs - “Allocations” and “Notes” and “Payment Plans” (if there is a Payment Plan attached to the matter). Highlight a bill to display information on these tabs, or to add a note, open the bill, process a Trust to Office transfer or print a list of outstanding accounts or print the notes..

8.9.17 “Debtors Letters” tab

This tab shows letters that have been sent as part of the Collection Plan for this matter. You can also reprint any of the letters.

8.9.18 “Trust Letters” tab

This tab shows letters that have been sent in relation to requesting Trust Funds. You can also reprint any of the letters.

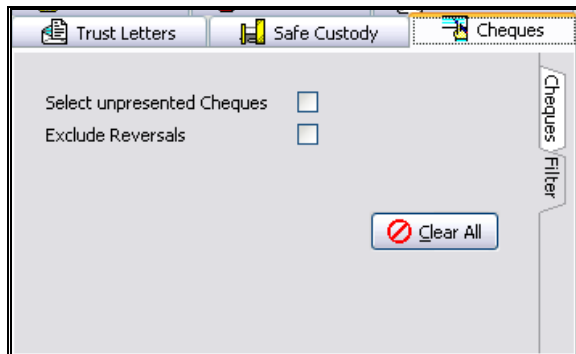
8.9.19 “Safe Custody” tab

This tab displays Safe Custody Items (with Packet Numbers) that are held for this matter. You can record new items and packets from this tab.

8.9.20 “Unpresented Cheques” tab

This tab displays all the cheques drawn for the matter. Each Cheque will show the Date Presented (if applicable) or Unpresented.

The “Filter” tab allows you to select only Unpresented Cheques, or to exclude reversals.



8.9.21 “Research” tab

This tab displays documents that have been produced.

8.10 Matter Menu & Toolbar

Performing different functions in the Matter area can be achieved by either selecting the icon or by selecting the relevant function from the Menu.

The icons or options that are displayed may vary from one Employee type to another.

Permissions to display the tabs is set in Security Options for each Employee Type.

8.10.1 Functions on Edit / Display Menu Toolbar

There are three options on the Menu Toolbar: - File, Search and Help.

File:

New **Fee / Sundry / Cheque / Cheque Request / Receipt / Bill / Task / Diary / Transit Register Receipt / Petty Cash / Investment / Protected Trust Journal**

These options allow you to process Accounting or Time transactions.
These functions are covered in the Operations Workshop.

Reopen List the last accessed matters.

Associations

Allows you to associate this matter with other matters.

Snapshot Create a Snapshot of this mater.

Autocost Starts an Autocosting entry for this matter.

Delete Deletes the matter displayed - this option is only available when no entries have been posted to the matter.

Print - Label

Prints a label for the matter.

Print - Details

Prints the financial and communication details of the matter.

Print – Collection Notes

Prints the Collection Notes for this matter.

Ledger - Fees / Sundries / Disbursements / Anticipated Disbursements / Debtors / Trust / Investment / Combo

Prints the selected Ledger for this matter.

Search

Find Displays the Matter list.

First / Previous / Next / Last

Moves to the First record, Previous record, Next record or Last record currently included in the Matter list (ie according to the Filter selections in place).

Matter Toolbar



New Fee

To enter time, or scale costs on this matter.



Start Timer

Opens the Fees Sheet and starts the timer for that matter.



Sundry Expense

Post sundry expenses on this matter such as photocopying, facsimiles, postage, courier etc.



Create Cheque

Create a trust or office cheque on this matter.



Create Cheque Requisition

Create a trust or office cheque requisition.



Create Receipt

Create either a trust or an office receipt.



Transfer trust funds between Protected and Unprotected

Transfer funds from Protected to Unprotected (or vice versa) on the selected matter.



New Bill

Create a new bill or edit an existing draft bill.



Debtor to Disbursement Journal

This option is usually disabled in Australian sites as credits to Disbursements are not recommended due to Tax regulations.



New Diary

Create a diary entry for this matter



Transit Register Receipts

Create a transit register receipt.














Petty Cash Journal

Create a Petty Cash journal entry for an incurred Disbursement.



Investment

Create a new Investment for this matter.

-  **First, Previous, Next, Last**
The VCR buttons are a standard method of moving through screens of matters.
-  **Find Matter**
Opens the Matter Selection screen.
-  **Snapshot**
Creates direct access to the matter via the Snapshots Pane.
-  **Associate**
Associate this matter with another matter.
-  **Refresh**
Immediately refreshes the data on the screen.
-  **Edit Matter Details**
Opens the Matter Edit screen.
-  **Complete this Matter**
Close this matter. A setting in Options determines whether or not you can complete matters with balances outstanding.
-  **Open Client for this Matter**
Open the client for this matter.
-  **Delete Matter**
Deletes the matter.
A matter with transactions or balances cannot be deleted.
-  **Print** Print matter label.
-  **Display Related Documents**
Click this icon to open your Document Management System, such as Lexis IM, iManage, Worksite, Redmap, WORLDOX, Radix

8.11 Printing

You can print a Matter label, the details of an individual Matter or a list of all the Matters displayed in the Matter Selection screen. The matters included in the Matter Selections Screen are determined by the Filter in use at the time.


8.11.1 Printing a Matter label



Hands on

In this exercise you will print the details for Matter 990155.

1. Open Matter 990155

2. Click on 

The Matter label dialog box will display.

3. Complete the printing details

4. Click on **[OK]**

The matter label will display on the screen.

5. Close the Print Display

8.11.2 Printing Details of one Matter

1. Select File | Print | Details

Details of this matter will display on the screen.




2. Close the Print Display

8.11.3 Printing all Matters



Hands on

In this exercise you will print a list of all the Matters.

1. Click on  to display the Matter Selection Screen
2. Click on  to clear the filter
3. Click on 

The list of Matters will display on the screen, in the same order as the Matter Selection screen.

You can use the icons on the Print Toolbar to change the display of the report, to move forwards or backwards through the individual pages or to print the report.

4. Use the various icons to become familiar with their operation
5. Close the Print Display
6. Close the Matter Screen



The order the matters print in can be changed by re-ordering the column on the matter display screen.

8.11.4 Functions on Matter Selection Screen Menu

File | Open

Use this option to open the selected matter

Reopen

Use this option to select from the last matters accessed

Refresh

Use this option to refresh the screen

Clear All

Use this option to clear the Matter Filter

Merge

Use this option to create a merge file or to merge to a Precedent.

Print**Labels All**

Use this option to print a label for each matter displayed in the list.

Labels – Selected

Use this option to print a label for a selected matter.

Details

Use this option to print a matter list.

8.11.5 Matter Selection Screen Toolbar



Refresh Refresh the data on the matter selection screen.

**Clear Filters**

Clear the filters set for the matter selection screen

**Create a Merge File**

Export selected Clients' information to Word Processing.

Merge to Precedent

Select this to merge the selected records with a Precedent.



Print Print list of selected Clients.

8.12 Matter Filter

The Matter Filter can be used to selectively list matters according to varying criteria.



Hands on

In this exercise you will find the Debt Recovery matters where MER is the Partner

1. Open Matters from the Application Toolbar
2. Select the “Filter” tab

The following screen displays:

3. *Select Equal to – Partner* Select MER
4. *Select Equal to – Type* Select DEBT
5. *Current Matters only* – Tick this (in the “opened” box - right-hand side)
6. Select the “Matters” tab

Lexis Affinity now displays the Debt Recovery Matter/s where the partner is MER

7. Close the matter listing

NOTE: The “%” sign can be used as a wild card when searching.

NOTE: the “Extra” tab can be used to search for information in the DataForm Fields.

Matter Filter fields

Select Equal to – Partner / Controller / Author / Trust Bank / emPower / Fee Rate Code / Type / Workflow / Branch / Dept / Coll. Plan / Fee Template Group / Client Master Group / Client Group

Use this option to locate matters that belong to any of the categories selected. This is an “and” test – ie if you select Partner MER and Type – Debt Recovery, only Debt Recovery Matters that belong to MER will be listed.

Trust Bank: Tick this to include Inactive Trust Bank Accounts in the drop down list.

**Select where criteria Contains / Starts with
Matter / Client Code / Alpha ID**

Use this option to search the Matter Number, Client Code or Alpha ID. For example, you can search for all the File Numbers that start with or contains 99011.

Select where Criteria Contains / Starts With – Client Name / Description / Your Reference / Contact / Bill To / Bill To Contact / Notes / Referred By

You can use this option to locate matters where you can match text in any of these fields.

Balances greater than – Work in Progress / Debtors / Disbursements / Fees Billed / Fees Received / Unbilled Sundries / Trust / Clear Trust / Investment

Use this option to find all matters where one or more balance is greater than the amount specified.

For example, you can search for matters where WIP is greater than \$500 and Disbursements is greater than \$10.

Modified By Select a user as the Modifier from the drop down list.

Modified Use this option to locate matters that were changed or altered on a certain date or between two dates.

Opened Use this option to locate matters that were opened on a certain date or between two dates.
For example, you can locate all matters opened this month by selecting the appropriate dates in Since and Before.
You can further limit this search to only Current Matters

Completed Use this option to locate matters that have been completed on a certain date or between two dates.

Archived Use this option to locate matters that have been archived on a certain date or between two dates.

Source Country

This is the country assigned to this matter to indicate the home country of the client.

Trust Overdrawn Matters

Generally, there will not be any matters with an Overdrawn Trust balance. However, if this is permitted, (such as in a Combined Ledger System) ticking this field will include only those matters that are overdrawn.

If Combined Ledger System is enabled:**Exclude Trust Loans**

This flag is not relevant to listing matters. For reporting purposes, this will exclude clients where the trust total is in debit.

“Extra” tab**Variable Contacts – Select Containing (Text)**

You can use this option to locate matters that match text in any of the Static / Variable Contact fields.

For example, if you wanted all the matters where JC Sparrow has been attached as a Barrister, select “Barrister” from the drop down list and type “sparrow” (or part thereof) in the field to the right.

DataForm - Select Containing (Text)

You can use this option to locate matters that match text in any of the DataForm fields. The Select Containing drop-down list enables you to select a search criterion from Select containing, Start with, Equal to and Not equal to.

DataForm - Balances Greater than - (Balances)

You can use this option to locate matters where amounts or values recorded in any of the matter DataForm fields are greater than the values entered here.

DataForm – Since and Before (Date)

You can use this option to search dates in DataForm fields. Since & before options are available.

Client and Matter Hold Flags**Exclude where Client is held**

Tick this if you want to exclude matters that belong to Clients that are flagged as “held”.

Include Matters – All Matters

Check this if you want to include all Matters regardless of their “Hold” status.

Include Matters – Matters with Hold flag not set

Check this if you want to only include Matters where the “Hold” status is not set.

Include Matters – Matters with only Hold flag set

Check this if you want to only include Matters where the “Hold” status is set.

Matter Hold Flag – Include Matters with Final Bill flag set

Tick this to include Matters where the Final Bill flag has been set.

Matter Hold Flag – Include Matters with Hold on Time / Disbursements

Tick this to include Matters that are on hold for Time and Disbursements only.

Matter Hold Flag – Include Matters on Registration Hold

Tick this to include Matters that are on Registration Hold. (Registration Hold prevents processing of Time, Disbursements and Billing entries).

Payment Plan

Select from;

- None
- Perpetual
- Pre Agreed.

Fee Sheet Options

Select from;

- Any
- Don't Round Units
- Round to Nearest Unit (but never to zero)
- Always Round Units Up
- Use minutes to recalculate value and minutes
- Use Client/Employee/System default
- Matter has different options to client.

8.13 Lexis Affinity Explorer

Lexis Affinity Explorer will open a “Windows Explorer” screen which displays all the users (on the left) and the matters where they are the Author.

This is an easy way to view the active matters for an author.

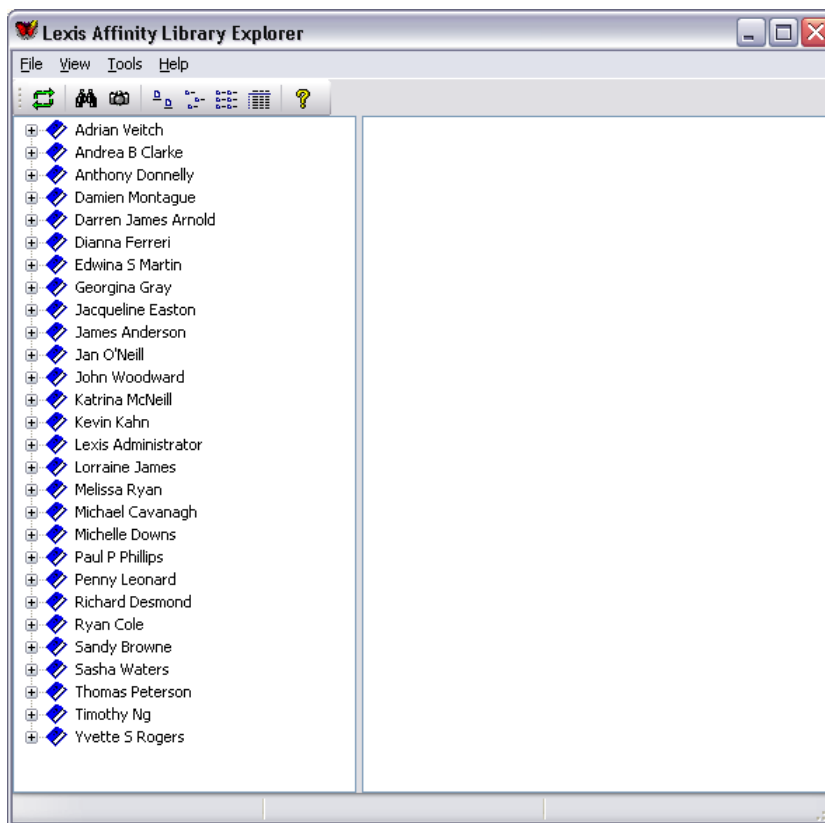


Optional Exercise

In this exercise you will open Explorer and list the matters for YSR

1. Open Database | Employees | Explorer

A screen similar to the following displays:



This screen shows all the Authors registered in the system.

2. Click on Yvette S Rogers

A List of Matter Numbers will be displayed on the right. A yellow icon indicates a current matter, a blue icon indicates an archived matter

3. Select View | Details

The list will include the Client and description of the matters.

Lexis Affinity Library Explorer

File View Tools Help

Adrian Veitch
 Andrea B Clarke
 Anthony Donnelly
 Damien Montague
 Darren James Arnold
 Dianna Ferreri
 Edwina S Martin
 Georgina Gray
 Jacqueline Easton
 James Anderson
 Jan O'Neill
 John Woodward
 Katrina McNeill
 Kevin Kahn
 Lexis Administrator
 Lorraine James
 Melissa Ryan
 Michael Cavanagh
 Michelle Downs
 Paul P Phillips
 Penny Leonard
 Richard Desmond
 Ryan Cole
 Sandy Browne
 Sasha Waters
 Thomas Peterson
 Timothy Ng
 Yvette S Rogers

FILEID	Client	Description	Part...	Author	Type
012399	Black Day Publishing...	Debt Recovery from Harris Publishing	MER	YSR	DEBT
012326	Black Day Publishing...	Debt Recovery from Regents Park B...	MER	YSR	DEBT
012347	Black Day Publishing...	Debt Recovery from The Open Book	MER	YSR	DEBT
990105	Black Day Publishing...	Debt from Gemini Ski Hire	MMC	YSR	DEBT
990044	Blackwell Scientific P...	Advice	MER	YSR	ADV
990046	Blackwell Scientific P...	Debt from Brown & Co Pty Limited	MMC	YSR	DEBT
990155	Blackwell Scientific P...	Debt from Hunter Recruitment	MMC	YSR	DEBT
990032	Blackwell Scientific P...	Debt recovery from Peters	MMC	YSR	DEBT
990045	Blackwell Scientific P...	General advice	MMC	YSR	ADV
010006	Blackwell Scientific P...	Recovery from Francis	MMC	YSR	DEBT
990143	Blackwell Scientific P...	Recovery of Debt from Gerard Recr...	MMC	YSR	DEBT
990071	Consolidated Suppli...	Debt Smith	MMC	YSR	DEBT
990085	Consolidated Suppli...	Debt from Kelly	MMC	YSR	DEBT
012422	Consolidated Suppli...	Sale to John Gribble	MMC	YSR	CV
990075	Department. Consu...	Debt from JM Smith	YSR	YSR	DEBT
990028	Department. Consu...	Recovery from Fauldings	YSR	YSR	DEBT
990102	Fauldings Pty Ltd	Test for Drug	MMC	YSR	DEBT
990042	Fauldings Pty Ltd	Trust for John	MMC	YSR	ADV
990036	Gemini Ski Hire	Debt from Browne	MMC	YSR	DEBT
990035	Gemini Ski Hire	Debt recovery form Neat	MMC	YSR	DEBT
990034	Gemini Ski Hire	Debt recovery from Fauldings	YSR	YSR	DEBT
012395	Godfrey, Michael & ...	Partnership Agreement	YSR	YSR	COMM
990232	Gribble, Mr John	Sale to Thompson	MER	YSR	CV
90917	James Printing Pty Ltd	General Advice	YSR	YSR	ADV
STAT_DEPOSIT	LAWINST	Law Institute Statutory Deposit	YSR	YSR	ADM
888001	Lewisham Reid - Sy...	Administration Matter YSR	YSR	YSR	ADM
990080	Walter Turnbull Adv...	Debt Recovery from John Browne Pt...	MMC	YSR	DEBT

27 Matters; 106 Archived Matters;



TIP: It is also possible to use Explorer to sort matters by client or matter type. Select View | Group by and choose one of the options available.

Information is displayed based on the selection made in View - select from small icons, large icons, list or details once a list has been selected.

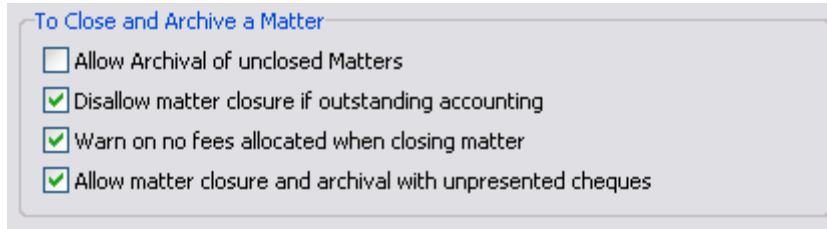
4. Close Explorer

Notes

8.14 Complete a Matter

Settings in System | Archiving control various options when completing a matter.

These options are shown below:



To Close and Archive a Matter

- Allow Archival of unclosed Matters
- Disallow matter closure if outstanding accounting
- Warn on no fees allocated when closing matter
- Allow matter closure and archival with unrepresented cheques

Allow Archival of uncompleted Matters

If ticked, you will be able to archive matters that have not been flagged as “Completed”.

It is recommended that this option is **not** ticked.

Disallow matter closure if outstanding accounting

If ticked, only matters with zero balances can be closed.

It is recommended that this option **is** ticked.

Warn on no fees allocated when closing matter

If ticked, Lexis Affinity Library will warn if a matter is being closed where no fees have been recorded.

Allow matter closure and archival with unrepresented cheques

If ticked, Lexis Affinity Library will allow matters with unrepresented cheques to be closed.

A setting in System | Posting | Fees, Billing & Allocating also allows for a WIP Write Off up to a nominated value to be processed on matters that are otherwise ready for completion.

NOTE: Completed matters retain full transaction history and can be reopened at any time.

Your firm policy may be to set the “Hold New Time / Disbursements” flag on a matter that has been finalised, but where the account has not been paid. This will prevent further time and disbursement entries being posted to the matter.


Matters may stay in the system completed, or you may choose to archive them.

Store Numbers are allocated when the matter is archived.

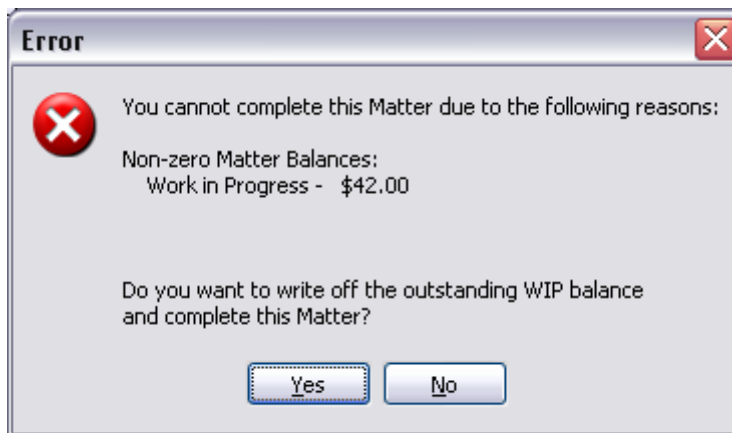


Hands On

In this exercise you will complete matter ARES-002. This matter has a WIP balance of \$42.00 which is to be written off.

1. Select Matters from the Application Toolbar
2. Locate and open Matter ARES-002
3. Click on  to complete the matter.

As this matter has zero balances except for WIP, the following message will display:



4. Click on **[Yes]** to open the Write Off dialog screen

Write Off Unbilled Fees, Disbursements and Sundries

Entity: LR Lewisham Reid
 Matter: ARES-002 Ares Military Research Pty Ltd
 Contract to produce Assault Rifles

Dispatch as at: 22/09/2010

	Available	Write Off		Tax	Total
Fees	\$42.00	\$42.00	Rebuild	\$4.20	\$46.20
Disbursements	\$0.00	\$0.00	Rebuild	\$0.00	\$0.00
Anticipated	\$0.00	\$0.00		\$0.00	\$0.00
Sundries	\$0.00	\$0.00	Rebuild	\$0.00	\$0.00
				\$4.20	\$42.00
					\$46.20

Write Off as at date: 22/09/2010

Keep Write Off form open after posting?

Note: _____

Date	Ref.	Private	Description	Tax Rate	Amount	Tax
3/07/2008	YSR	N	Telephone attendance	TAX	42.00	4.20

5. Click on **[Post]**

The following message will display:

Warning

Are you sure you want to complete this Matter?

6. Click on **[Yes]**

If the matter you are completing has already been archived, the following message will display:

Warning

Do you want to retain the existing archive number for this Matter?

7. Click on **[Yes]** to retain the same archive number

Note the Date Completed and Archived Number displayed on the screen.



8. Click on  to display the matter list again

9. Click on Refresh 

The Matter you have completed will be in a different colour – usually green.

10. Locate your Matter and review the details in the Completed column.

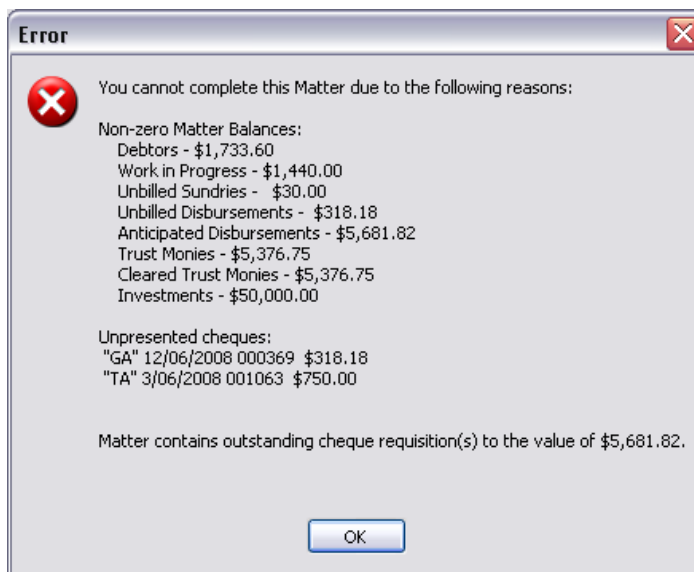
Once a matter has been completed it can be re opened or archived.

11. Close the Matter List and Matter Screen when finished viewing.

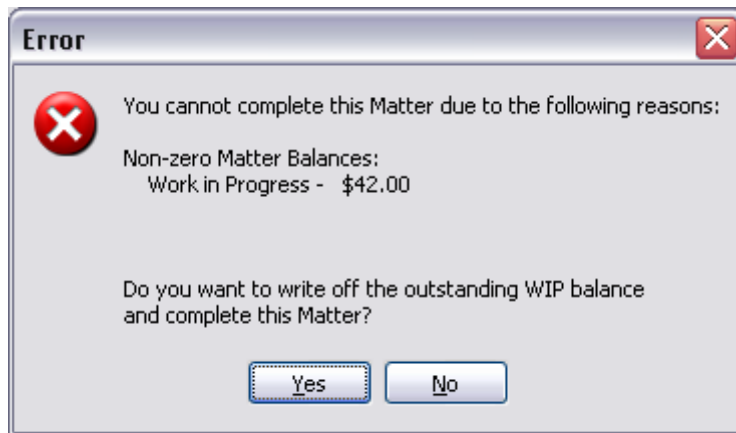
Messages that might display when completing matters

The following error message may appear – depending on the settings in System | Archiving.

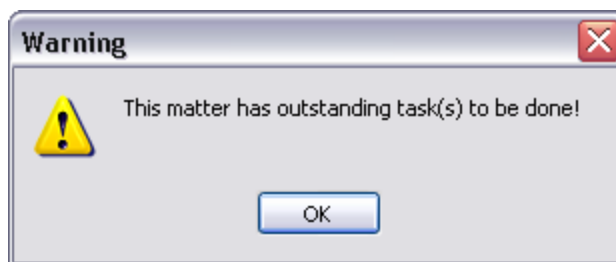
If the Matter you are completing has balances, a message similar to the following will display:



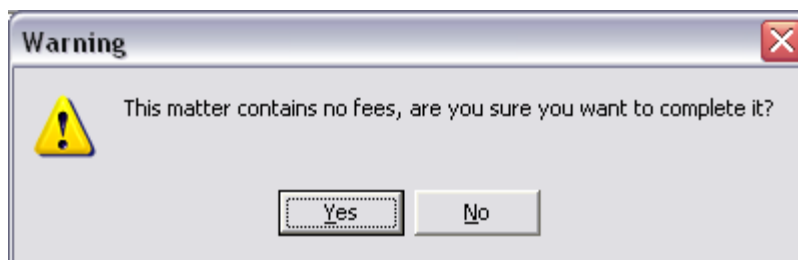
If the Matter you are completing has zero balances, except for Work in Progress, a message similar to the following will display:



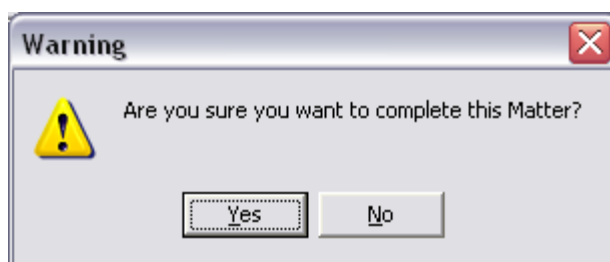
If the Matter you are completing has zero balances but has outstanding undone tasks a message similar to the following will display:



If the Matter you are completing did not have any Fees recorded, a message similar to the following will display:



If the matter can be closed a message similar to the following will display:



8.15 Re open a Completed Matter

Sometimes it is necessary to re open a matter that has previously been completed.



PROCEDURE

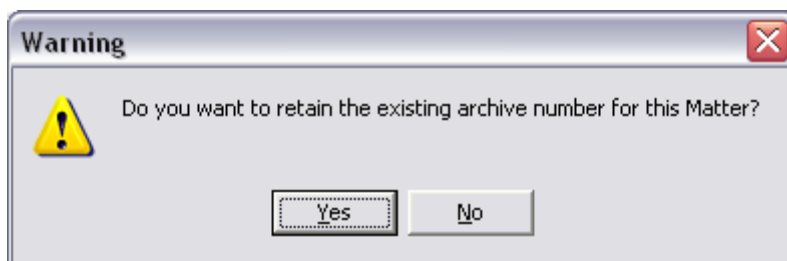
1. Open the client for the matter
2. Select the “Matters” tab
3. Locate the Completed Matter
4. Click on **[Edit Matter]**
5. Select the “Miscellaneous” tab
6. Untick the Date of Completion field
7. Click on **[OK]**

If this matter has a DataForm attached, this will open.

8. For this exercise close the DataForm

Re opening a Previously Archived Matter

If a matter has been completed, archived and then unarchived again, when the matter is completed for the second time, Lexis Affinity will prompt with the following message:



This allows you to either keep the original Archive Number or allocate a new one.

8.16 Archive Matter/s

There are two ways to archive matters - archive a single matter or batch archive a number of closed matters.

A Store number is allocated to archived matters.

8.16.1 Archive a Single Matter



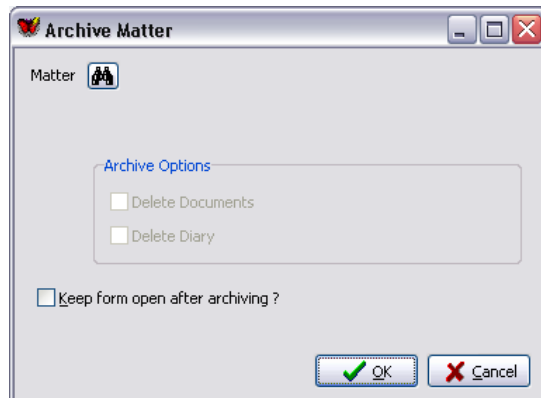
Hands On

In this exercise you will archive matter 012406.

1. Open Archival

(Database | Archive)

The following screen displays:

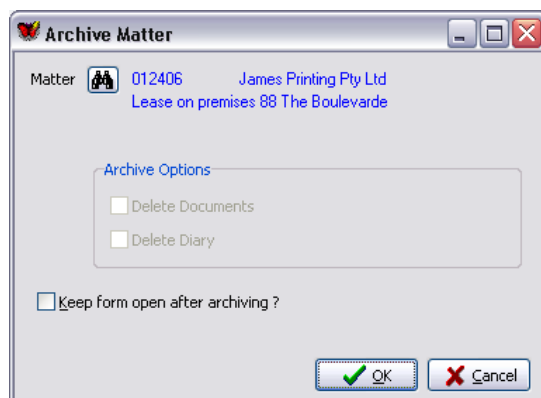


2. *Keep form open after archiving* Leave unticked for this exercise

3. Click on 

4. Select Matter 012406

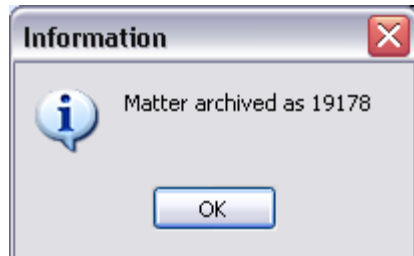
The following screen will display:



5. Click **[OK]** to archive the selected matter

An Archived Matter Number is allocated when a matter is archived.

A sample of this message is displayed below:



6. Click **[OK]**

8.16.2 Unarchive a Single Matter

Sometimes a matter may be archived accidentally, or an archived matter may need to be re instated.



Hands On

In this exercise you will unarchive the same matter – 012406.

1. Open Archived matters (Database | Archive)

Lexis Affinity will display all the archived matters.

2. Locate Matter 012406


You can either search through the list

OR

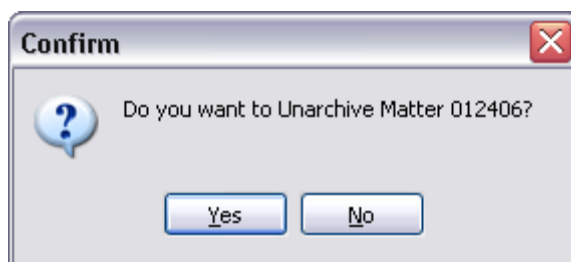
Type the File ID (012406) in the search field at the bottom

OR

Use the filter to locate it quickly.

3. Double click the matter
4. Click on **[UnArchive]**  to reopen the file.

The following prompt will display:



5. Click on **[Yes]** to unarchive the matter.

The Edit Matter screen displays.

6. Select the “History” tab

You will see the progress of the Matter

7. Close the Matter screen

8.16.3 Archive Batch

Some users will find it more convenient to archive matters in a batch – for example at the end of a month.



Hands On

In this exercise you will archive all the completed matters

1. Open Archive Batch (Database | Archive)

This starts the Matter Archive Wizard

2. *Archival of Completed Matters* Select this

You can select to either archive the completed matters or Print Ledgers, Labels and / or Trust Statements of previously archived matters.

3. *Skip Author and Client selection and go straight to finalise* Tick this

If you are archiving all completed matters, you can skip these screens.

4. Click **[Next]** to proceed.

The final screen of the Wizard will display:



5. *Printing Details* Tick the “Do not print” option for this exercise

In your office, you would usually select to print all the ledgers etc for archived matters. However you can leave printing of the labels at this stage.

When all the matters have been archived, you can then open the Archived Matter

list, use the filter to select the matters archived that day.
Select File | Print | All.

Matters labels will then be produced in a batch.

6. Click on **[Finish]**

Lexis Affinity displays the matters which have been selected for archiving.

7. Click on **[Archive]** to archive the matters

Alternately, you can click on the Wizard button to go back through the selection screens.

8.16.4 Display Archived Matter

Archived matters can be viewed via the Archived Matters icon. Archived Matters for a particular client can be accessed via the Client Screen.



Hands On

In this exercise you will list all the Archived Matters and view the details of Matter 990104.

1. Open Archived Matters (Database | Archive)
2. Locate the Archived Matter (Original Matter Number 990104)
3. Double Click to open

Lexis Affinity displays many tabs which you can click on to display all the information about this matter.

You can also select any of the various Ledgers to view the transactions on this matter.

4. Select the Archive tab

Lexis Affinity displays the Archive details, including details of Archive Requests and movement of the file and Box Number details (if allocated).


8.16.5 Attaching Box Numbers

If you use a Box Management System, you will need to record the Box Number for each archived matter.




Hands On

In this exercise you will display a list of archived matters with no box number and then add the box number to an archived matter.

1. Click on  to open the list of Archived Matters
2. Select the “Filter” tab
3. *Empty Box Number* Tick this
4. Select the “Archives” tab

A list of Matters that have no box number will display.

5. Select and open the first matter
6. Select the “Archive” tab
7. *Box No* 256
8. Click on  to save the entry

Note the updated display in Request / Movement as shown below:

Last Request/Movement				
User				
Date				
Request/Movement				
Create Date	Operator	Status	Trans. Descr.	
10/11/2004	YSR	Completed	Update Archive Box No	
16/06/2004	YSR	Completed	Insert Archive	

You can click on  to move to the next matter listed.

9. Close the Archived Matter screen

8.16.6 Mailouts for Archived Matters

You can use the information stored in Archived Matters to send letters to clients with archived matters. This may be useful for when you need to advise Clients that their files are about to be destroyed, or for other general or marketing correspondence.

8.17 Archived Matters Menu and Toolbar

Performing different functions in the Archived Matters area can be achieved by either selecting the icon or by selecting the relevant function from the Menu.

8.17.1 Functions on Archived Matters Menu

There are three options on the Menu Toolbar: - File, Search and Help. (Search and Help are standard).

File:

Unarchive Restores the selected matter to current matters.

Reopen Lists the last accessed Archived Matters.

Snapshot Places a Snapshot of this Archived matter icon the Snapshots pane.

Delete Delete the Archived Matter entry.

Print – Label Prints a label for this Archived Matter

Print – Details

Prints the registered details of the Archived Matter, the Fees Billed, Received and Written Off and the Archiving history of the matter.

Ledger – Fees / Sundries / Disbursements / Debtors / Trust / Combo

Prints the selected Ledger for the selected Archived Matter.

8.17.2 Archived Matters Toolbar



Unarchive this File

This will restore the selected matter to current matters.



Archive Box Management

This facility allows you to record the physical location of the archived matter.



Edit Matter Details

This allows you to edit the matter details without having to re-open the matter.



First, Previous, Next, Last:

Moves to the First record, Previous record, Next record or Last record currently included in the PhoneBook list (ie according to the Filter selections in place).



Find

Search for an entry in the PhoneBook. This will show the PhoneBook list based on the filters used to select this entry.



Snapshot

Place a copy of this PhoneBook entry on your desktop for easy access.



Open Client for this Archived Matter

This will open the Client screen.



New Archive Requisition

This allows you to register a request to have an archived file removed from the archive database and re instated. This request can then be printed.



Print the Archive Matter label


This allows you to print a label for the Archived matter.

8.17.3 Archived Matter Filter

The Archived Matter Filter can be used to selectively list Archived Matters according to varying criteria.



Hands On

1. Click on the  then click on the "Filter" tab

The Filter screen is shown below:

Archive Matter Filter Fields - Standard

Select Equal to – Partner / Controller / Author / Trust Bank / Fee Rate Code / Entity / Type / Workflow / Branch / Dept / Fee Template Group / Source Country / Client Master Group / Client Group /

Use this option to locate matters that belong to any of the categories selected. This is an “and” test – ie all criteria specified must be satisfied.

Select where criteria – Contains / Starts with – Matter / Client Code / Alpha ID

Use this option to locate matters that start with or contain the entered text for Matter, Client Code or Alpha ID text. To perform a "wild card" search, enter the percent sign % before the text entered.

Select where criteria – Contains / Starts with

Client Name / Description / Your Reference / Contact / Bill To / Bill To Contact / Referred By

Use this option to locate matters that start with or contains the entered

text.

If you select Static Other Parties, you can select the type of Other Party from the drop down list.

Archive – Status / Location / Box Number

Use this option to locate matters of a particular Archive Status or Location or Box Number. This is an “and” test – ie all criteria must be satisfied.

Empty Box No

Tick this to locate all the Archived Files that do not have a Box Number.

This is particularly useful after running Batch Archive to locate those archived matters that don't yet have a Box number recorded.

Balances greater than – Fees Billed

Use this option to find all matters where Fees Billed is greater than a specified amount.

Archived

Use this option to locate matters that were archived on a certain date or between two dates.

Opened

Use this option to locate matters that were opened on a certain date or between two dates.

Completed

Use this option to locate matters that have been completed on a certain date or between two dates.

Archive Matter Filter Fields – Extra

The following additional details are found on the Extra Tab:

Select Containing - DataForms

Use this option to find all matters where the text / values or dates entered match those found in DataForm fields attached to matters.

Review Date / Off Site Date / Destruction Date / Destroyed Date

Use this option to locate all matters where the date range entered here is found in the matters for the selected date criteria.

NOTE: You can also further refine the search by ticking “Match Case” and “Remove Order By (Speed Up)”.

Notes

9. Diary

Lexis Affinity provides for the recording of diary entries for PhoneBook records and matters.

Diary can be found in the Case Management group on the Applications Toolbar.

Use the Diary program to create a diary entry, display and print diary entries for a period, delete diary entries, create fee entries and record phone messages.

Diary Entries can also appear in your Microsoft Outlook Calendar, if you have activated Outlook integration.

9.1 Diary Events

A Diary Event is a way of categorising a diary appointment. It is a term to describe the main purpose of the appointment (eg. Conference, Settlement, Mediation). You may find it useful to have a printed list of Diary Events for reference.



Hands on

In this exercise you will print a list of the Diary Events.

1. Open Diary Events (Case Management | Diary)
2. Click on **[Print]**

The list of Diary Events will display on the screen as shown below:

Printed 20/08/2008 12:51:28 PM	LewishamReid Diary Event	Page 1
<hr/>		
Event		
<hr/>		
Conference		
Debt Recovery		
Exchange		
Hearing		
Lunch		
Mediation		
Meeting		
Settlement		
Telephone		
<hr/>		

3. Close the print display.
4. Close Diary Events


9.2 Diary Jurisdictions

A Diary Jurisdiction allows you to categorise an appointment by jurisdiction (eg. Federal Court, Family Court, Supreme Court). This will enable you to filter and report by jurisdiction.



Hands on

In this exercise you will print a list of the Diary Jurisdictions.

1. Open Diary Jurisdictions (Case Management | Diary)
2. Click on . The list of Diary Jurisdictions will display on the screen as shown below:

Printed 20/08/2008 12:54:14 PM	Lewisham Reid	Page 1
Jurisdiction	Diary Jurisdictions	
County Court		
Family Court		
High Court		
Magistrates Court		
Supreme Court		
VCAT		

3. Close the print display.
4. Close Diary Jurisdictions


9.3 Diary Locations

Diary Locations are pre-defined locations that can be selected when an appointment is created (eg. Our Office, Bank, Melbourne Office, Settlement Rooms).



Hands on

In this exercise you will print a list of the Diary Locations.

1. Open Diary Locations (Case Management | Diary)
2. Click on . The list of Diary Locations will display on the screen as shown below:

Printed 20/08/2008 12:55:31 PM	Lewisham Reid	Page 1
Location	Diary Location	
Agents Rooms		
Bank		
Brisbane Office		
Client's office		
Court		
Law Institute		
Melbourne Office		
Our office		
Parramatta Office		
Perth Office		
Restaurant		
Settlement Rooms		
Sydney Office		

3. Close the print display.
4. Close Diary Locations.

9.4 Diary

Diary gives you access to Daily, Work Week, Weekly and Monthly diaries; and a list of Diary Events. Diary also handles meeting invitations, telephone messages and tasks. (Tasks are usually generated as part of the Workflow for a matter.)

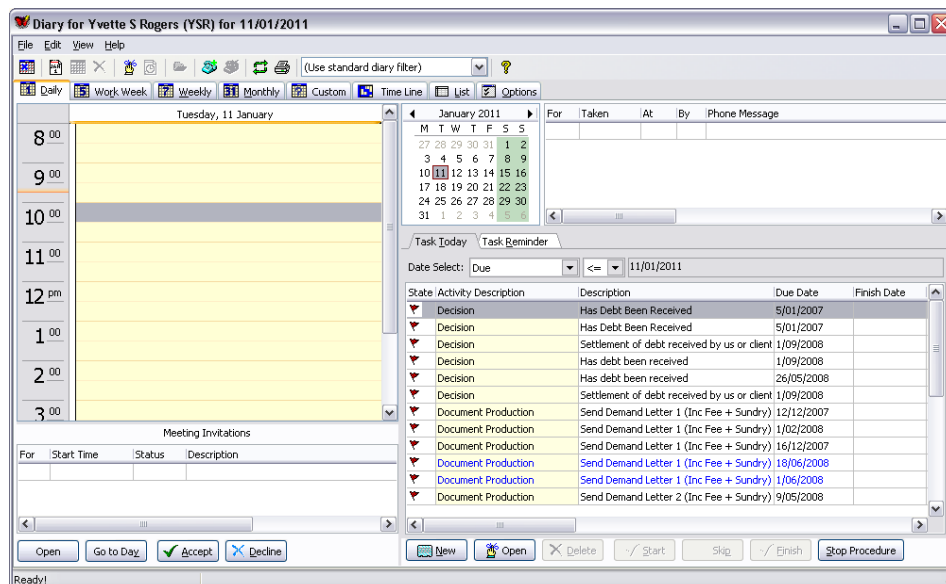


Hands on

1. Open Diary (Case Management | Diary)
2. Select the “Daily” tab

9.4.1 “Daily” tab

A sample Diary screen is shown below:



This tab lists all the appointments (Diary Entries) for today as well as any telephone messages that have been recorded, Meeting Invitations and the Task List.

The appointments and tasks that are displayed are controlled by the Filter selection (on the “Options” tab). Currently the standard filter is selected so all Diary appointments and tasks are shown for the logged in user.

9.4.2 Altering the Display of the Daily Diary



Hands on

In this exercise you will alter various features of the display of the Diary screen.

Daily View Options

This allows you to remove or add back the different sections of the Daily View.

1. View | Daily View Options
2. Select Hide All

Only the Daily Diary section displays

3. View | Daily View Option
4. Select Hide All

All sections will now display.

Daily Diary Intervals

You can change the intervals for which the Daily Diary displays.

1. View | Intervals
2. Select Quarter Hour option
3. View the Daily Diary
4. Repeat this to select your preferred interval

Cell Height

You can change the vertical size of each interval.

1. View | Cell Height
2. Select "Large"
3. View the Daily Diary
4. Repeat this to change it to your preferred size

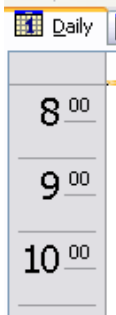
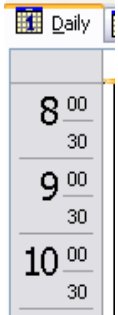
Drag and Drop

Drag and Drop allows you to click on a diary entry and drag it to a new time slot. You can turn this off by unticking this option in View. Leave ticked.

1. View | Drag and Drop

Hide Minutes

1. View | Hide Minutes

<p>If Minutes are hidden – the times displayed will be in hours (regardless of the setting for Interval) as shown below:</p>	<p>If Minutes are NOT hidden – the times displayed will show the increments as set by Intervals – for example if the Interval is half hour the display will be similar to the one shown below:</p>
	

Hide Off Hours

Daily and Work Week views show times in the layout. You can select to only display time slots in normal working hours or a full 24 hour day. If a full day is selected, the hours outside the normal working day are shaded.

1. View | Hide Off Hours

If you have made an appointment in the “Off hours” (ie outside normal working hours) and Hide Off Hours is selected, it will not display in the Daily or Workweek views.

Hide Page Tabs

1. View | Hide Page Tabs

This will remove the “Daily”, “Work Week”, “Weekly”, “Monthly”, “List” and “Options” tabs.

2. View | Hide Page Tabs

This will activate the tabs again.

Separate “Reminder For” Scheduler

This feature allows you to view more than one Diary at the same time. To include another Employee’s Diary, you must include them in the filter first.

1. Select the “Options” tab
2. Select the “Diary Filter” tab
3. Highlight JAE in the “Available” column and click on **[Add]**
4. View | Separate “Reminder For” Scheduler

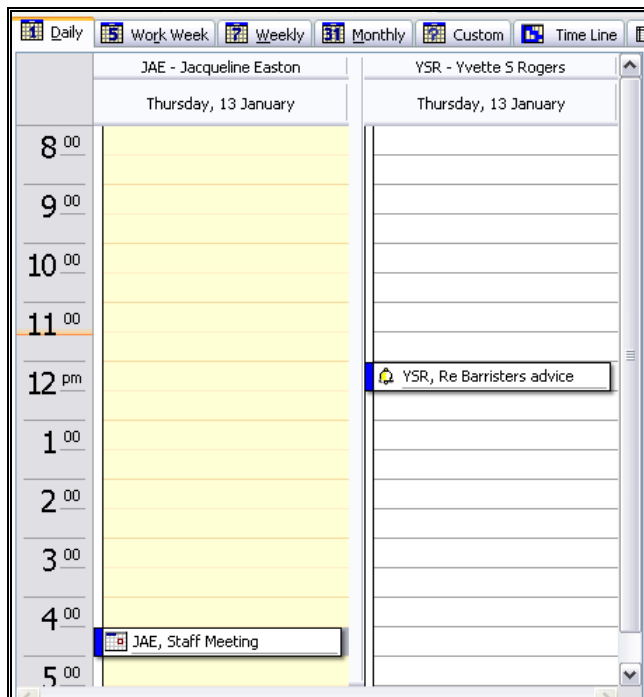
A new area for JAE will be displayed.

5. Highlight a time slot on the Diary for JAE and create a new diary entry

The screen defaults the *Reminder For* to JAE.

6. Complete the Diary Entry

The screen will be similar to the one shown below:



Show Date Range

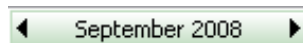
1. Click on this to show the date range of the diary period

Move to another date within the Month

1. Select another day by clicking on the respective date on the Monthly Calendar.

Move forward a Month


2. Move to the next month by clicking on the right arrow next to the Month Name



3. You can then click on the date required

Return to today's date

4. View | Go To | Go To Today

OR Click on 

Today's Diary is displayed again.

Select another date

5. View | Go To | Go To Date
6. *Date* Enter another date in the format DD/MM/YYYY
7. *Show in* Select Day Calendar

You can also select Work Week, Week, Month or Custom View

Custom View allows you to specify a period and / or a number of days and will re draw a Weekly Diary screen based on those dates.

8. Click on **[OK]** to display the Diary screen again

9.4.3 Clash Warnings

To ensure that users are warned of clashes in appointments, you must ensure that this option is ticked.

9. Select Edit
10. Ensure *Warn Clashes* is ticked

9.4.4 Create a Diary Entry




Hands on

In this exercise you will create a new Diary Entry for Matter 012352 for sometime today.

1. Select today's date from the calendar
2. Highlight a time approximately 1 hour from now
3. Click and drag the mouse to a time one hour from the start time

The Diary Event dialog box displays as shown below:

Note that the Start and Finish times have been completed.

If you create a Diary Entry by clicking on  Lexis Affinity will default to the current time.

4. *Matter* 012352

or Click on  to open the Matter Selection screen and select Matter 012352

The details of the matter will be inserted


5. *Reminder For* Accept the prompted user.

Lexis Affinity will default to the logged in User.

6. *Event* Select Meeting
7. *Location* Select Our Office

8. *Jurisdiction* Leave blank

9. *With* John Steven Smith

Click on the  to open the PhoneBook list

10. *Description* to discuss possible outcomes

11. *Print Description on Event Report?* Tick this

This will include the description of the Diary Entry to be included on a report of your Diary Entries (the Event Report).

12. *Notify* Tick this and accept 15 minutes notice before the appointment

13. *Select Resources Tab*

14. Click on the **[Add]**

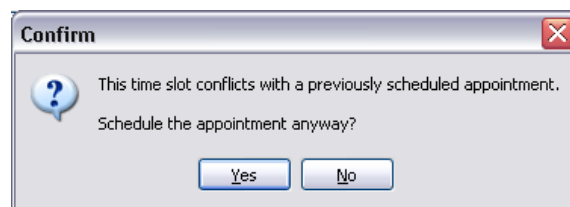
15. *Type* Select Meeting Rooms

16. Select Small Meeting Room

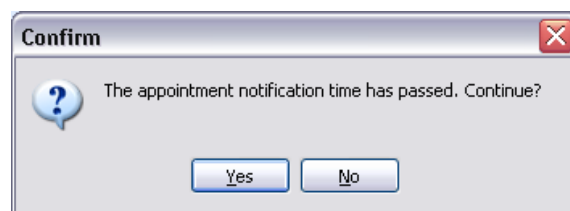
17. Click on **[OK]** for Resource Allocation

18. Click on **[OK]** to process the Diary Event

If there is a clash with an existing Diary entry, an alert warning will be displayed



If the time for the notification before the meeting has passed, a message will be displayed.



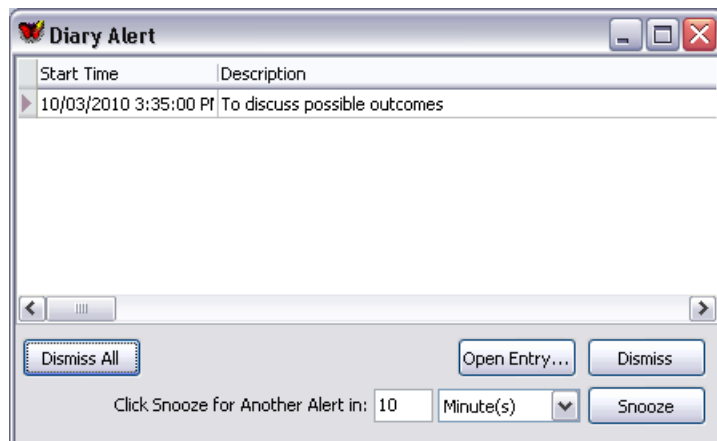
The Diary entry will now display on the Day section of the "Daily" tab.

19. Rest the mouse over the Diary entry to display the full details

NOTE: Diary entries can be easily converted to Fee entries. If you are likely to use this feature, you should record your Diary descriptions with this in mind.

Diary Alerts

When it is time for the alert to show it will display as shown below:



Dismiss the Diary Alert when it appears.

Diary Alert Options

- Dismiss All** This will stop any more alerts.
- Open Entry** This will open the Diary Entry for this Alert and allow you to view or alter the details.
- Dismiss** This will stop the alerts for this Diary entry appearing.
- Snooze** This will allow you to be reminded again. Select the time frame for the next reminder.

9.5 Converting a Diary Entry to a Fee Entry


Lexis Affinity provides a quick and easy way of converting your Diary entries into Fee entries. This will save re-keying information such as matter number and some or all of the description.



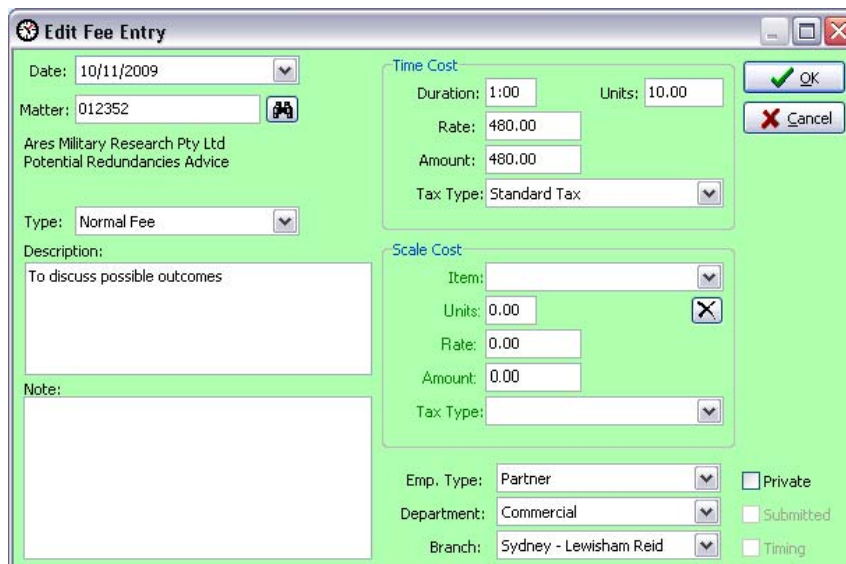
Hands on

In this exercise you will convert the Diary Entry for Matter 012352 (with John Smith) into a Fee Entry.

1. Highlight the Diary entry for 012352

2. Click on 

The Fee Creation screen displays as shown below:



3. *Description* Edit the description to read:

Meeting with John Smith to discuss possible outcomes

4. *Units* Lexis Affinity prompts with the length of time of the Diary Event
5. Click on **[OK]**

To view this entry

1. Open Fee Sheet (Fees & Billing | Fees)
2. Locate the converted entry
3. Close the Fee Sheet

9.6 Meetings

Meetings can be scheduled between Employees. Creating a meeting creates an entry in the diaries of all staff / Employees invited to the meeting and displays an invitation to the meeting on the Diary screen. Each user can either accept or decline the invitation to the meeting. If the meeting is declined the Diary entry is removed from their Diary.



Hands on

In this exercise you will organise a meeting for all the partners and the Administration department.

1. Open Diary if not already open (Case Management | Diary)
2. Click on the following Monday in the Monthly Calendar displayed on the “Daily” tab

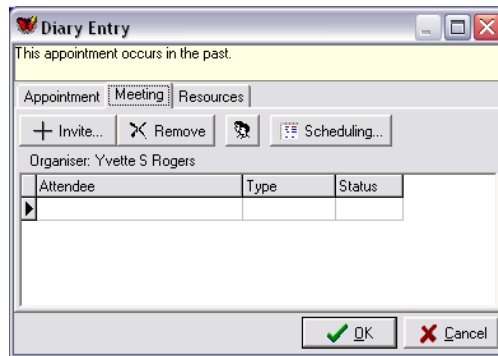
August 2008						
M	T	W	T	F	S	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

3. Click and drag over the period from 8:00am to 9:30am
The Diary Entry screen displays.
4. *Reminder for* Accept the prompted user
5. *Event* Select Meeting
6. *Location* Select Our Office
7. *Description* Monthly Partners Meeting
8. *Print description on Event report?* Tick this
9. *Notify* Tick this 15 *Minute(s)* before appointment

Create a Meeting

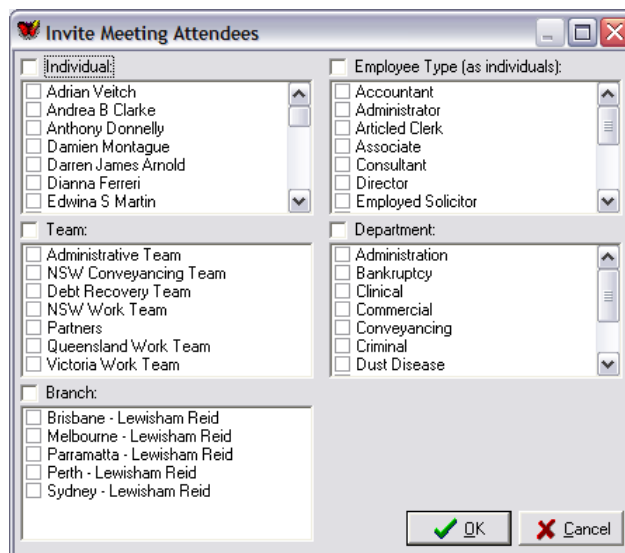
10. Select the “Meeting” tab

The following screen displays:



11. Click on **[Invite]**

The following screen displays:



Meeting Attendees

The Invite Meeting Attendees selection screen provides five methods of selecting employees to be included in a meeting invitation.

If you select either Individuals or Employee Type, each individual will be listed in the Invite List. This means that each employee can be individually removed from the meeting.

If you select Teams, Departments or Branches, only the name of the Team, Department or Branch is displayed and it is not possible to 'un-invite' or exclude a member of the selected group from the meeting.


12. *Employee Type* Select Partner and Senior Partner from the list

Click in the check box beside the two employee types.


13. *Department* Select Administration

14. Click on **[OK]**

The names of the Partners and Senior Partners will display in the “Attendees” list, as well as the Administration Department.

15. Click on 

The names of the Employees in the Administration Department and the partners display.

16. Click on 

The Department name displays.

17. Click on **[Scheduling]**

This screen shows times when the invitees are already committed and resources booked.

If the time range is not suitable, close the schedule screen. Close the Diary Entry screen and Select View | Meeting Scheduler Options to alter the time range.

18. Close the Schedule screen after checking for clashes

Booking a Resource

19. Select the “Resources” tab
20. Click on **[Add]**
21. *Type* Select Meeting Rooms
22. Select Board Room
23. Click on **[OK]**
24. Select the “Appointment” tab

9.6.1 Recurring Diary Entries

You may record Diary Entries that are repeated one or many times into the future.



Hands on

In this exercise you will make this diary entry a recurring entry for every 1st Monday morning of the Month at 8:00am.

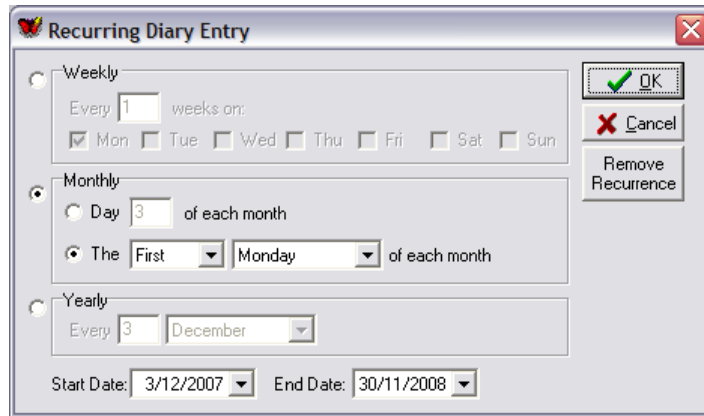
1. Ensure the Diary entry for the Partners Meeting is open

OR

Locate and open the Diary entry for next Monday for the meeting at 9:00am

- Click on **[Recurrence]**

The following screen displays:



Recurring Diary Entry

Weekly
Every 1 weeks on:
 Mon Tue Wed Thu Fri Sat Sun

Monthly
 Day 3 of each month
 The First Monday of each month

Yearly
Every 3 December

Start Date: 3/12/2007 End Date: 30/11/2008

OK
Cancel
Remove Recurrence

- Select Monthly
- The First
- Select Monday

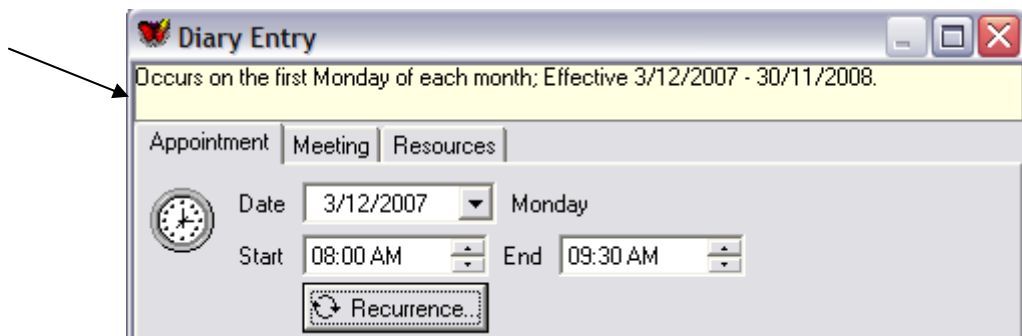
Monday should be showing by default as you selected Monday for the Meeting.

- Start Date Accept the prompted date
- Finish Date Accept the prompted date

Note that Lexis Affinity prompts with a date 12 months ahead.

- Click on **[OK]**

Note the Diary Entry now displays the recurring details.



Diary Entry

Occurs on the first Monday of each month; Effective 3/12/2007 - 30/11/2008.

Appointment Meeting Resources

Date 3/12/2007 Monday

Start 08:00 AM End 09:30 AM

Recurrence...

- Click on **[OK]** to update the Diary Entry

The Meeting is now inserted in everyone's diary.

To view this meeting for MMC

1. Select the "Options" tab
2. Highlight the existing Author on right-hand side
3. Click on **[Delete]**
4. Select MMC on left hand side
5. Click on **[Add]**
6. Select the "Daily" tab
7. Locate the Meeting invitation on the "Meeting Invitations" list
8. Select the first Meeting (for 8:00am) and click on **[Accept]** (Take note of this date)

The time should be marked in the diary.

If not, you may need to:

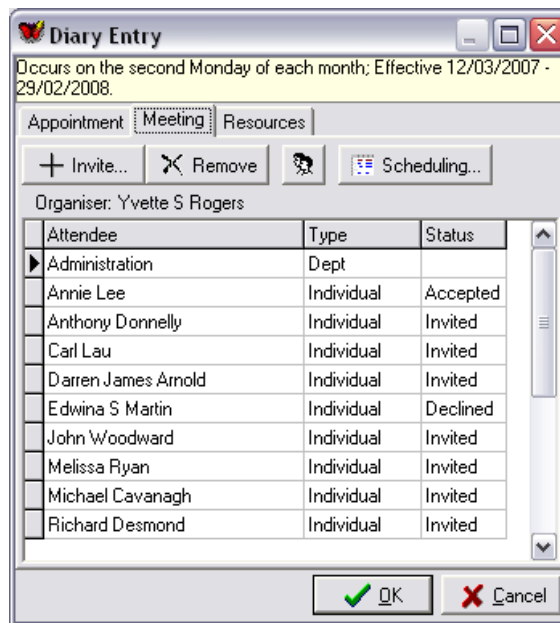
Move to the first Monday in the month by clicking the date in the calendar and then move to the time of the meeting

9. Select the "Options" tab
10. Repeat the procedure to display the Diary entries for the logged in user
11. Select the "Daily" tab

Find who has accepted the Meeting Invitation

12. Double click on the Diary entry
13. Select *Edit this Occurrence only* **[OK]**
14. Select the "Meeting" tab

A screen similar to the following displays:



From here you can see who has accepted or declined your meeting invitation. Attendees with the status “Invited” have neither accepted nor declined their invitation.

15. Click on **[Cancel]**

9.7 Phone Messages

This section shows Phone Messages. Which messages display is determined by the settings in the “Options” | “Diary Filter”.




Hands on

1. Right click in the Phone Message area
2. Select New Message

Alternately you can click on  to create a new Phone Message

The New Phone Message dialog box appears as shown below:



3. *Message for* Select the logged in user
OR
Click on  to locate the correct User ID
4. *Message* Please call Humphrey Charles before 4pm
QuickCodes can be used here.
5. Click on **[OK]**

9.8 Tasks

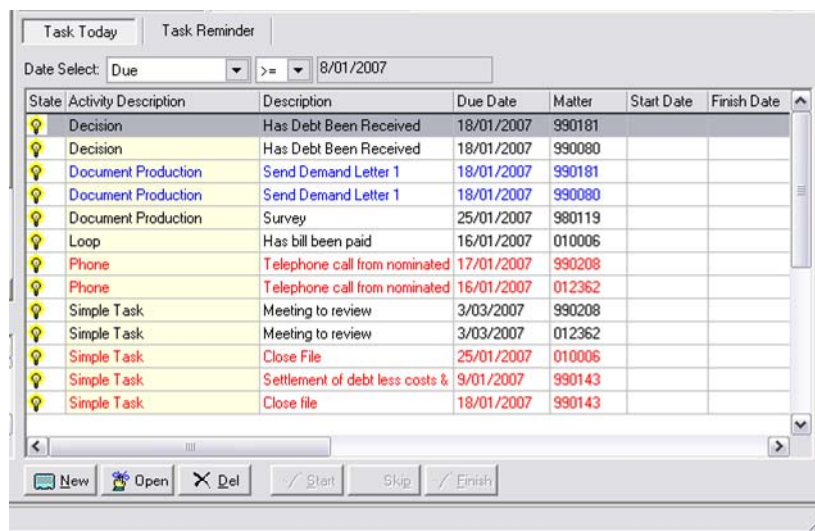
Tasks are activities that need to be actioned for a matter. Tasks usually have a date assigned but not a specific time as they are steps in the conduct of a matter such as production of documents, telephone calls and emails. Some Tasks **will** have a set time and duration (eg. an appointment).



DISCUSSION

1. Open Diary.

The task area is shown below:



State	Activity Description	Description	Due Date	Matter	Start Date	Finish Date
Decision	Decision	Has Debt Been Received	18/01/2007	990181		
Decision	Decision	Has Debt Been Received	18/01/2007	990080		
Document Production	Document Production	Send Demand Letter 1	18/01/2007	990181		
Document Production	Document Production	Send Demand Letter 1	18/01/2007	990080		
Document Production	Document Production	Survey	25/01/2007	980119		
Loop	Loop	Has bill been paid	16/01/2007	010006		
Phone	Phone	Telephone call from nominated	17/01/2007	990208		
Phone	Phone	Telephone call from nominated	16/01/2007	012362		
Simple Task	Simple Task	Meeting to review	3/03/2007	990208		
Simple Task	Simple Task	Meeting to review	3/03/2007	012362		
Simple Task	Simple Task	Close File	25/01/2007	010006		
Simple Task	Simple Task	Settlement of debt less costs &	9/01/2007	990143		
Simple Task	Simple Task	Close file	18/01/2007	990143		

Task Today Lists tasks for the logged-in user by:

- Created date
- Due date
- Start date
- Finish date

Task Reminder

shows all the tasks that have been flagged to have reminders

Tasks are covered in more detail during in the Tasks section of this document and during Workflow training.

9.9 Diary Views

There are several other Diary Views. Choose the view that best suits you.

9.9.1 Work Week



DISCUSSION

1. Select the “Work Week” tab

This view shows all the diary entries for the week, with the options to move back to the Previous Week or the Start of the Month. There is also an option to go forward to Next Week or Month End.

The screen is displayed below:

Diary for selected employees for 4/03/2007

File Edit View Help

(Use standard diary filter)

Daily Work Week Weekly Monthly List Options

Month Start Prev. Week

	Monday, February 26	Tuesday, February 27	Wednesday, February 28	Thursday, March 1	Friday, March 2
8 am					
9 am					
10 am				YSR, Instructions from new cl... Event: Meeting Location: Our office	
11 am					
12 pm					
1 pm			YSR, Professional lunch Event: Lunch Location: Our office		
2 pm					
3 pm				YSR, Ares Military Research ... For: Yvette S Rogers With: Smith, John Steven To discuss possible outcomes Event: Meeting	
4 pm					
5 pm					
6 pm					
7 pm					

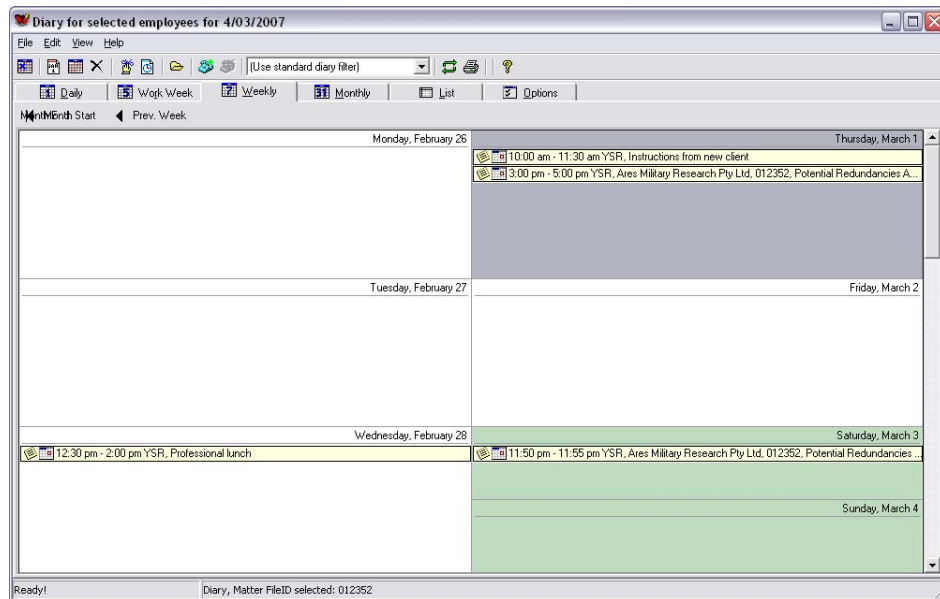
Ready! Diary, Matter FileID selected: 012352

9.9.2 Weekly

1. Select the “Weekly” tab

This view shows all the diary entries for the week (including weekends), with the options to move back to the Previous Week or the Start of the Month. There is also an option to go forward to Next Week or Month End.

The screen is displayed below:

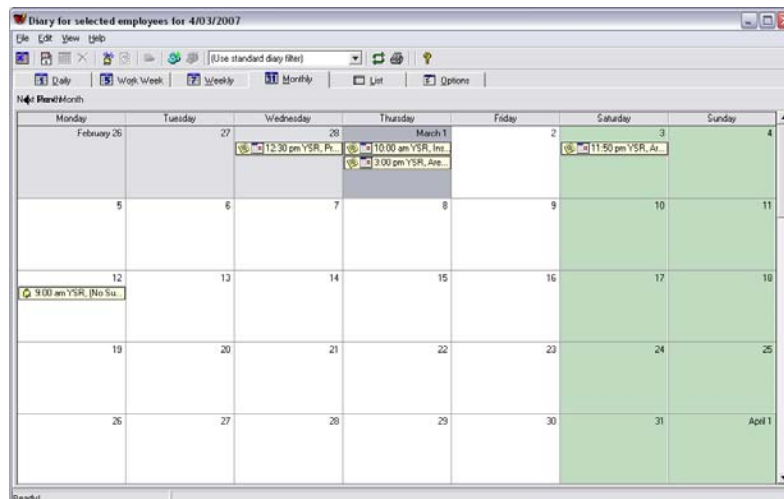


9.9.3 Monthly

2. Select the “Monthly” tab

This view shows all the Diary Entries for the month. You can click on the left and right arrows to move backwards and forwards.

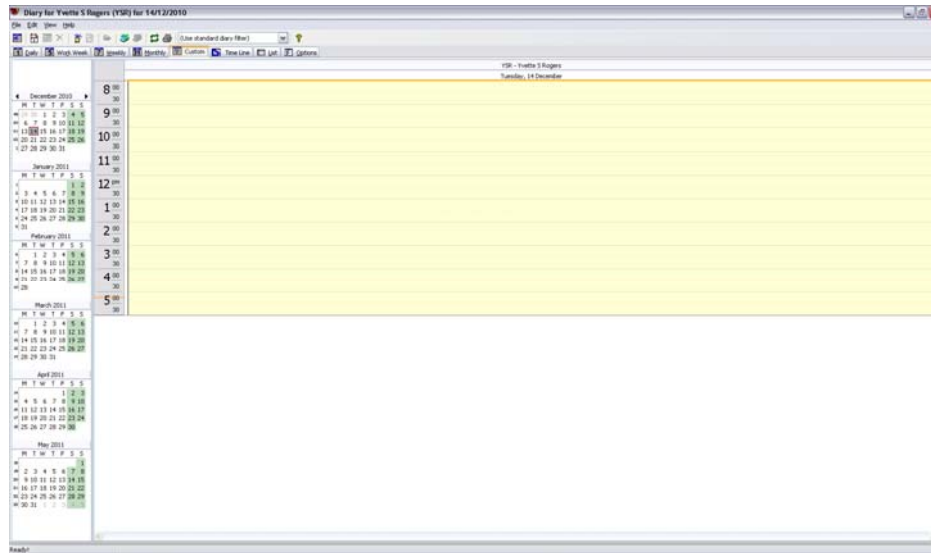
The screen is displayed below:



9.9.4 Custom View

This view shows Monthly Calendars in the left pane and a daily view with horizontal time slots in the right pane.

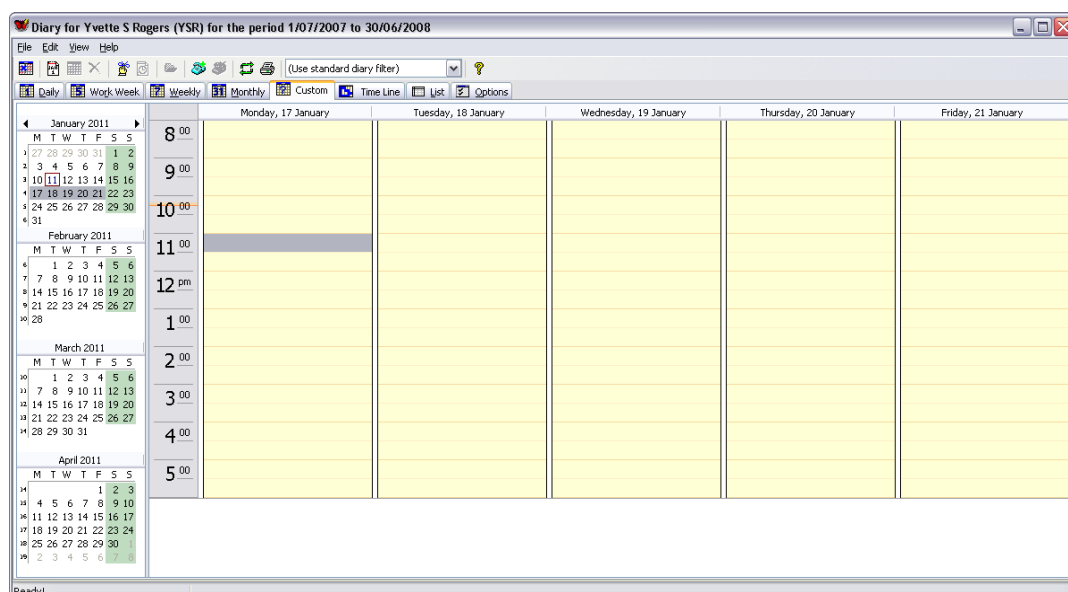
1. Select View | Custom



The first Monthly Calendar shown will be the current month, followed by consecutive months. You can use the left and right arrows to move through the months.

You can include multiple days in the right pane by highlighting them in the Monthly Calendar. You can highlight multiple adjacent days by clicking a date and dragging to the end date, or by highlighting the first date and holding the SHIFT key while you select the end date. To select non adjacent dates, hold the CTRL key and click the days in the Monthly Calendar you want to view.

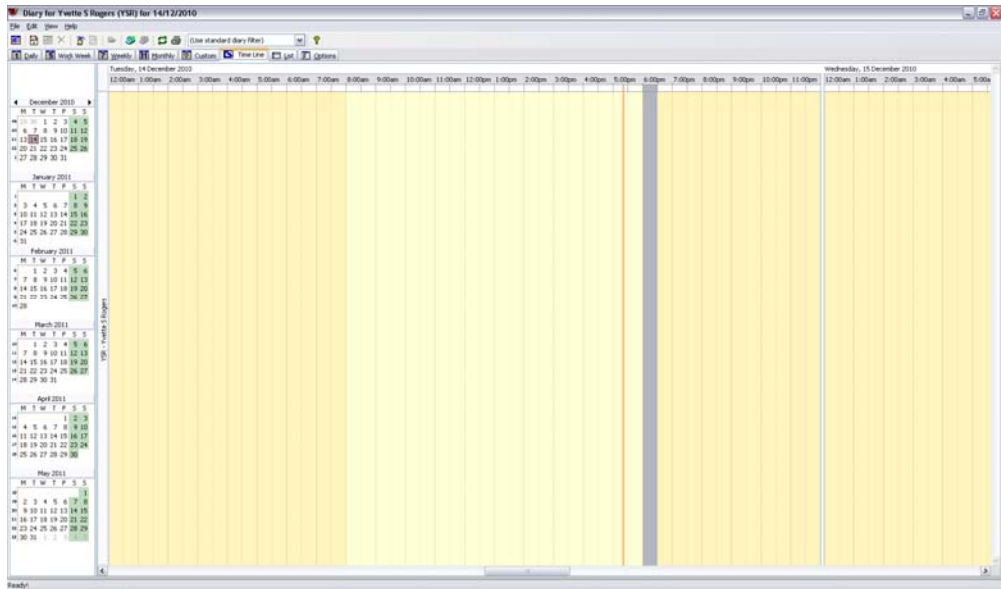
If a week is selected the display will look similar to the one below:



9.9.5 Time Line View

This view shows a Monthly Calendar on the left and a daily view with vertical time slots on the right as shown below:

1. Select View | Time Line



The first Monthly Calendar shown will be the current month, followed by consecutive months. You can use the left and right arrows to move through the months.

9.9.6 List

This option allows you to select Diary entries by a date range.



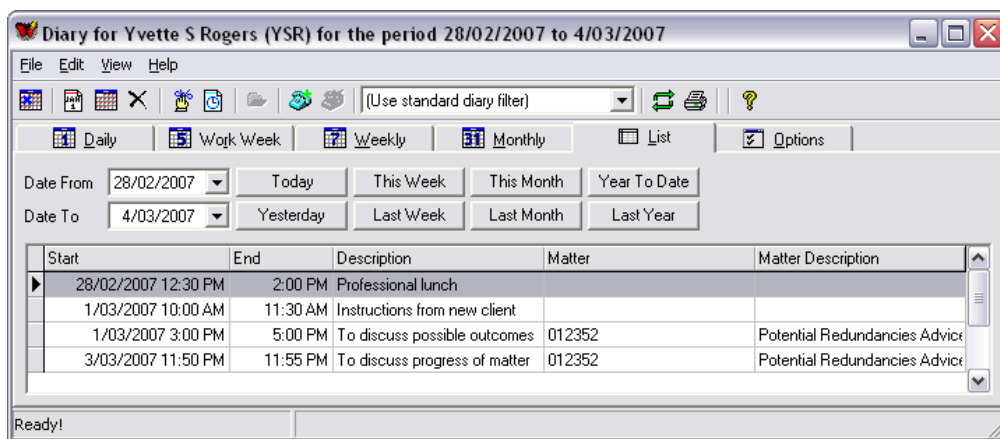
Hands on

1. Select the “List” tab

Today’s Diary Events are displayed

You can double click on a Diary Event to get more information, or to edit the Event.

The columns included in this list are determined by the setting in Options | Diary Columns.



9.10 Options

The “Options” tab provides for control of the information displayed, not only by filter but also the details of entries displayed.



Hands on

1. Select the “Options” tab. There are six tabs in “Options” – located on the right hand side of the screen.

9.10.1 “Diary Filter” tab

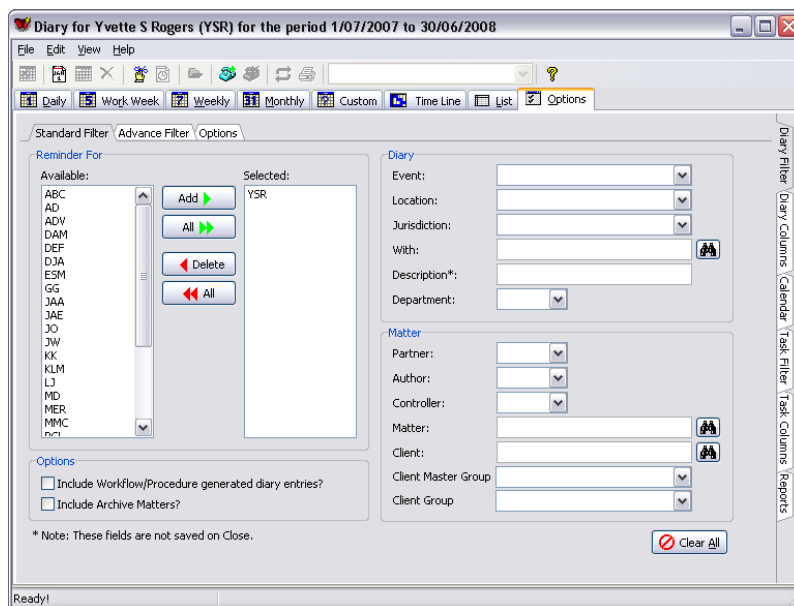
2. Select the “Diary Filter” tab

There are three tabs within the “Diary Filter” tab

“Standard Filter” tab

3. Select the “Standard Filter” tab

The Standard Filter is displayed below:



4. Click on **[Clear All]**
5. *Reminder For* Add YSR to the *Selected* column
6. Select the “List” tab

Diary Events for YSR will appear.

Notice the Title Bar of the Window displays the details of who the Diary list is for as well as the date range.

Standard Diary Filter Fields

The Filter settings apply to the Diary Events that are displayed in the “List” tab.

Reminder For

Lexis Affinity will default to the logged in User.

You may add additional Users as required.

Note: If you include more than one employee in the *Selected* column, when you close and reopen Diary, the first screen displayed will be the “Options | Diary Filter” tab. This notifies the user that the diary filters are not in “default” mode.

Include Workflow / Procedure generated diary entries

Check this box to include the Diary Entries that are automatically generated by Workflow Procedures.


Include Archive Matters

Check this box to include Diary Entries for archived matters.

Diary Event You can select a particular type of Diary Event – such as Meeting

Location You can select a particular location.
This will help coordinate staff movements.

Jurisdiction You can select a particular Jurisdiction.

With You can enter a name or use the  to locate a PhoneBook entry.

Description You can enter text (or part of the text) to search for a Diary entry.


Note that these details will not be saved when Diary is closed.

Department You can select a particular Department.


Matter


Partner You can select a particular Partner.

Author You can select a particular Author.

You can enter a Matter Number or click on  to open the Matter Selection Screen.

Controller You can select a particular Controller.

Matter You can enter a Matter Number or click on  to open the Matter Selection Screen.

Client You can enter a Client Name or click on  to open the Client Selection Screen.

Client Master Group

You can select a Client Master Group from the drop down list.

Client Group

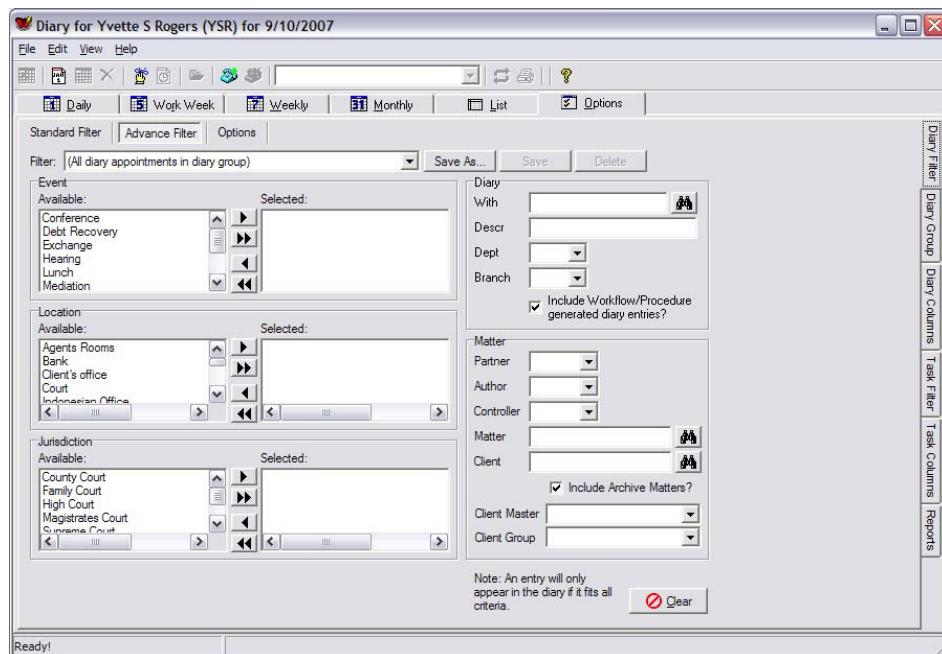
You can select a Client Group from the drop down list.

“Advance Filter” tab

This will be discussed later in this section.

The “Advance Filter” tab allows you to locate Diary entries by multiple Event, Location or Jurisdictions in addition to other Diary settings.

The Advance Filter screen is shown below:





Filter You are able to make Filter selections and then save those settings to use again.

Diary Event / Location / Jurisdiction

Select the items from each section to assist in locating the required Diary entries.

For example you can select all the Exchanges due to take place in your office for the coming week.

Use the  and  to select the Events, Locations and Jurisdictions.

NOTE: Entries will only be included if they meet all the criteria specified.

“Options” tab

Refresh Every

Nominate the number of seconds (up to 1000) between automatic refreshes.

9.10.2 “Diary Group” tab

This will be discussed later in this section.

9.10.3 “Diary Columns” tab

This option enables the user to determine their particular layout of columns for the “List” selection.




Hands on

In this exercise you will alter the layout of the “List” tab, so that the columns that will show are;

Start Event Location Description Client Name Matter Description, Matter and For.

1. Select the “Options” tab
2. Select “Diary Columns” tab – on the right-hand side

3. Click on 

This will remove all but the default columns.

4. Select the “List” tab


The default columns – Start, End & Description will display.

5. Select the “Options” tab

The default columns – Start, End & Description are now in the “Displayed” column.


6. Hold the <CTRL> key and click on each of the nominated items:

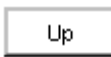

Client Name, Location, Event, Matter, Matter Description and For

7. Click on 

This will move the items you selected to the “Displayed” Column.

8. Select “End” in the Displayed column

9. Click on 

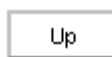
You now need to use the  and  keys to re order the items.

A suggested order is:

Start, Event, Location, Description, Client Name, Matter, Matter Description, For

Most users would not need to include the “For” column if they mainly look at the Diary for themselves, however if you are checking on other appointments, this may be useful.

10. Highlight “Event”

11. Click on  until “Event” appears after “Start”

12. Continue to do this until the “Displayed” list is in the order you prefer.

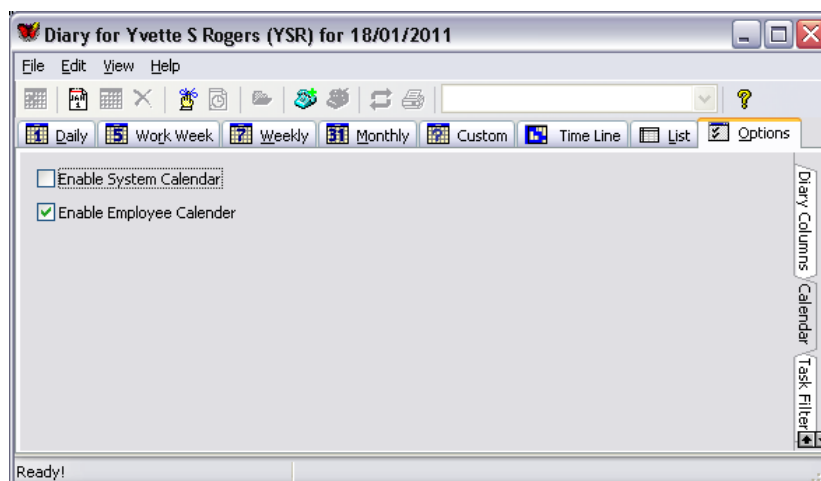
13. Select “List” tab

The list of Diary events should now include different columns and in the order you specified.

You can alter the size of the columns by clicking on the heading separator and dragging the mouse to the right or left.

9.10.4 “Calendar” tab

This tab allows you to select whether the default System Calendar or the individual Employee calendars (or both) will apply to the Monthly Calendars shown on the various Diary Views.



Enable System Calendar

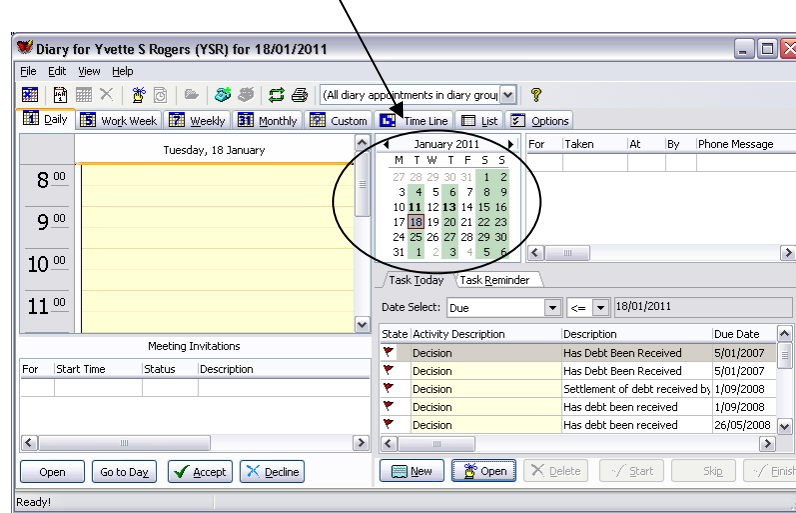
This is the default setting. The System Calendar is the one stored in System Settings | Settings | General.

Enable Employee Calendar

To use this feature, first ensure that a Calendar has been attached to the Employee record for whom you are displaying the Diary.

Example:

If a PARTTIME Calendar (where Tuesday, Thursday, Saturday and Sunday are non working days) is attached to YSR and Employee Calendar is selected, the Monthly Calendar displayed will be as shown below. The sample shown is the “Daily” view, however the Monthly Calendars shown on the “Custom” and “Time Line” views are also altered.

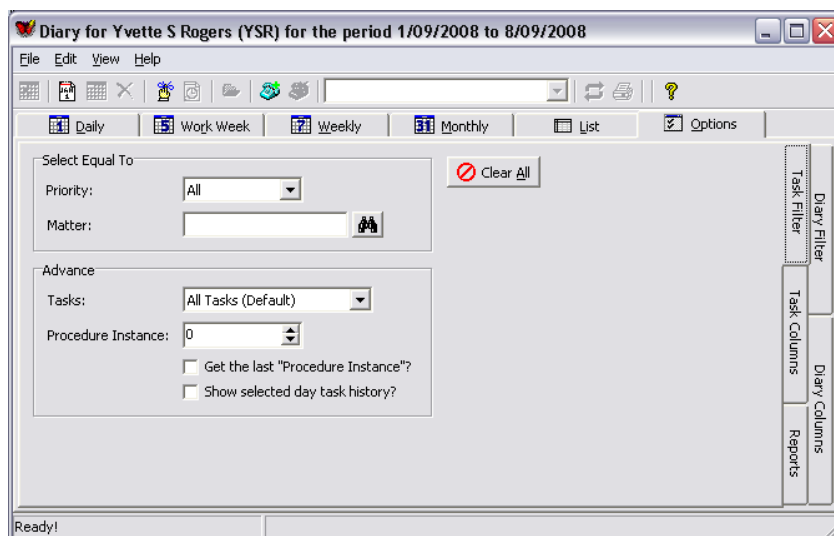


NOTE: If both options are ticked, the calendar shown will be a combination of both Calendars.

9.10.5 “Task Filter” tab

This option allows the user to select which tasks are to be reported on the Task List.


The screen is displayed below:



Task Filter Fields

Priority Select from:

All
Normal
High
Critical

Matter Complete the Matter ID or click on  to display the Matter list

Tasks Select which tasks are to be reported. You can select from:

All tasks
All Custom Tasks
All Procedure Tasks
All Workflow Tasks

Proc Instance You can select a particular instance from the procedures that are attached to a matter
OR select only the last one

Show selected day task history

Ticked - finished tasks for the selected day will be included in the display.

Unticked - finished tasks will be hidden.

9.10.6 “Task Columns” tab

This option enables the user to determine which columns of information will appear on the Tasks section of the Diary Day view.



PROCEDURE

1. Select the “Options” tab
2. Select the “Task Columns” tab
3. Add Priority to the “Displayed” Column
4. Re order the Columns if required
5. Select the “Daily” tab

The Columns you have selected should be displayed in the Tasks area on the bottom right hand side of the screen.

9.10.7 “Reports” tab

This option allows you to select a title for an Event report.

You will need to use the “Diary Filter” to determine the contents of the Report.



Hands on

1. Select the “Options” tab
2. Select Diary Filter
3. *Reminder for* Select YSR
4. Select the “Reports” tab (located on the right hand side)
5. *Title* Enter a title that explains the report
for example: “YSR Appointments for <date>”
6. *Hide Attending Column* Leave unticked
7. *Page Break on day* Leave unticked
8. Select the “List” tab
9. Click on **[This Month]**
10. File | Print | Event Report
The Event Report will print to the screen
11. Close the display

9.11 Diary Groups and Filters

A Diary Group is a pre-defined group of Employees, used to display that Group’s diary appointments.

A Diary Filter is a set of criteria used to narrow down the diary entries displayed.

Groups and Filters can be created and saved for future use. Groups and Filters saved as “Public” are available to all users. “Private” Groups and Filters are only available to the user who created them.

Diary Groups and Filters can be created by your System Administrator (using the System program) or by individual users (using the Diary program).

9.11.1 Diary Groups

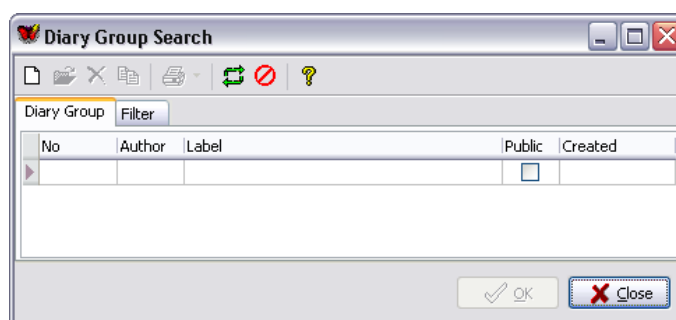


Hands on


In this exercise you will create a Diary Group that includes the office junior, all secretaries, and Georgina Gray. This group should be called “Non Professional Staff”.

1. Open Diary if not already open
2. Edit | Diary Group Maintenance

The following screen displays:



If any Diary Groups already exist, they will be listed here.

3. Click on  to create a new Diary Group

The following screen displays:

Diary Group

Label: Public?

Available:

- ABC - Andrea B Clarke
- AD - Anthony Donnelly
- ADV - Adrian Veitch
- DAM - Damien Montague
- DEF - Dianna Ferreri
- DJA - Darren James Arnold
- ESM - Edwina S Martin
- GG - Georgina Gray
- JAA - James Anderson
- JAE - Jacqueline Easton
- JO - Jan O'Neill
- JW - John Woodward
- KK - Kevin Kahn
- KLM - Katrina McNeill
- LJ - Lorraine James
- MD - Michelle Downs
- MER - Melissa Ryan
- MMC - Michael Cavanagh
- PGL - Penny Leonard

Selected:

Buttons: Add, All, Delete, All

Filter:

Department: (All)

Type: (All)

Buttons: OK, Cancel

4. *Filter / Type* Select OJ - Office Junior from the drop down list

The names of the Employees attached to the Employee Type are now displayed in the "Available" column on the left hand side.

5. Click on

The Employees are now in the "Selected" column on the right hand side.

6. *Filter / Type* Select Secretary from the drop down list

The names of the Employees attached to the Employee Type are now displayed in the "Available" column on the left hand side.

7. Click on

The additional names are now displayed in the "Available" column.

8. *Filter / Type* Select (All) - this is found at the top of the list.

All the Employees names are now displayed.

9. Locate and highlight Georgina Grey

10. Click on 

All the required Employees should now be listed in the “available” column.

11. *Label* Non Professional Staff

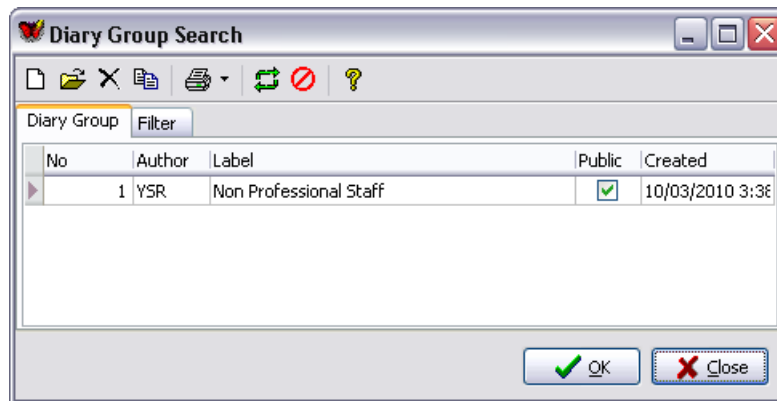
12. *Public* Tick this

A Public Group can be accessed by all users.

If this is not ticked, this Group is only available to the user who created it.

13. Click on **[OK]**

The new Diary Group will now appear as shown below:



The Author of the Diary Group is the user who created the Group.
(Groups created via the System option will have the Author of ‘sys’.)

From this screen you can edit or delete an existing Group, copy a group to a new group with a different name and print either a list of groups or the names of the Employees in the groups.



Hands on

Create another public group called “Partners” comprising the Employee Type Partner.

Attempt this on your own, asking your instructor for help if required.

Diary Group “Filter” tab

The Diary Group “Filter” tab allows you to select Groups created by a particular Employee.

14. Close the Diary Group Search screen
15. Close the Diary Group



TIP: If you need to change a Diary Group Filter to Public or Not Public, Click on [Save As] and tick or untick Public.

9.11.2 View Diary Entries for a Diary Group



Hands on

In this exercise you will view the Diary entries for the Partners Group which you have just created.

1. Select the “Options” tab
2. Select the “Advance Filter” tab
3. Select the “Diary Group” tab located on the right hand side
4. *Group* Select Partners from the drop down list
5. Select the “List” tab
6. Alter the *Date To* to the end of the next month

The list will now display the dates and times of the Partners Meeting and the Invitees.

Print the Dairy entries

7. Click on 

The Diary listing will display on the screen

9.11.3 Diary Filters

The Diary Filters can be used to locate certain Events, Places or Jurisdictions in conjunction with other Diary settings such as the “With” details or Matter settings such as Partner.

Create a Diary Filter

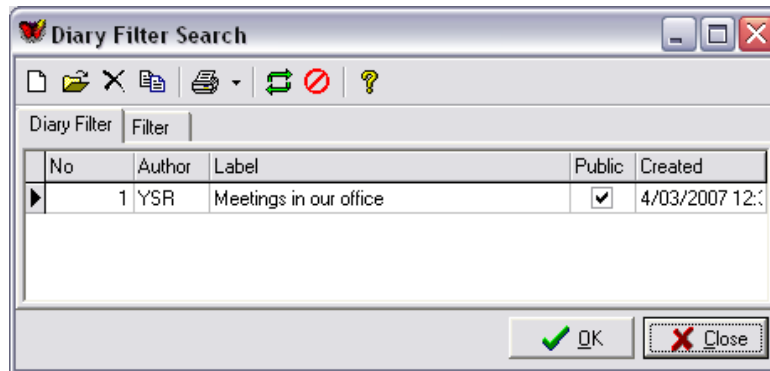


Hands on


In this exercise you will create a Diary Filter to locate Diary Entries for Meetings that are to be held in “Our Office”.

1. Edit | Diary Filter Maintenance

The following screen displays:



If any Diary Filters already exist, they will be listed here.

2. Click on  to create a new Diary Filter

The following screen displays:

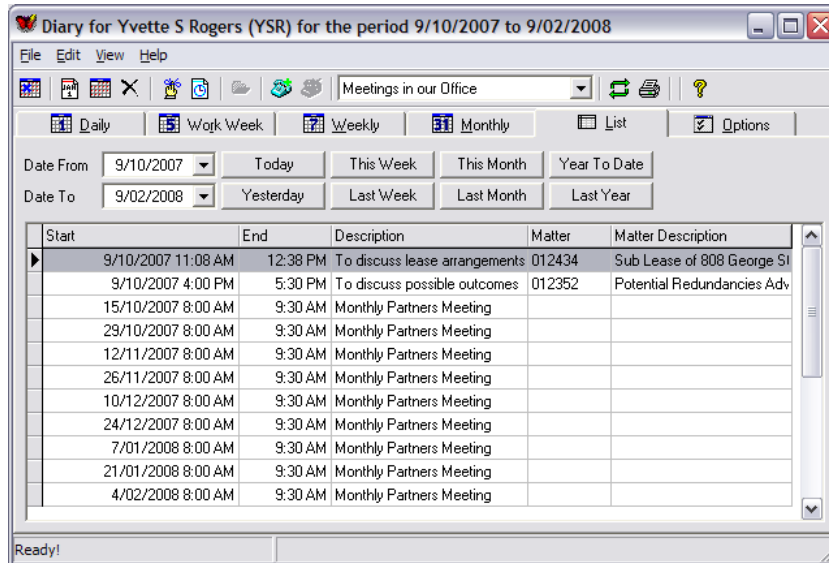
3. *Label* Meetings in Office
4. *Public* Tick this
5. *Event* Select Meeting
6. Click on 
7. *Location* Select Our Office
8. Click on 
9. Click on **[OK]** twice

Diary Filter “Advance Filter” tab

The Diary Filter “Advance Filter” tab allows you to select Diary Filters created by a particular Employee.

Using Diary Filters

10. Select the “List” tab
11. Change the “Date to” a few months into the future
12. Select “Meetings in our office” as a filter at the top of the screen.



Start	End	Description	Matter	Matter Description
9/10/2007 11:08 AM	12:38 PM	To discuss lease arrangements	012434	Sub Lease of 808 George St
9/10/2007 4:00 PM	5:30 PM	To discuss possible outcomes	012352	Potential Redundancies Adv
15/10/2007 8:00 AM	9:30 AM	Monthly Partners Meeting		
29/10/2007 8:00 AM	9:30 AM	Monthly Partners Meeting		
12/11/2007 8:00 AM	9:30 AM	Monthly Partners Meeting		
26/11/2007 8:00 AM	9:30 AM	Monthly Partners Meeting		
10/12/2007 8:00 AM	9:30 AM	Monthly Partners Meeting		
24/12/2007 8:00 AM	9:30 AM	Monthly Partners Meeting		
7/01/2008 8:00 AM	9:30 AM	Monthly Partners Meeting		
21/01/2008 8:00 AM	9:30 AM	Monthly Partners Meeting		
4/02/2008 8:00 AM	9:30 AM	Monthly Partners Meeting		

9.12 Diary Reports

The Diary Reports are selected from the File option on the Toolbar

9.12.1 Combined Diary & Task Report

This report combines both Diary entries and Tasks that are due to be completed. You can use filters to customise your report.



Hands on

In this exercise you will print a combined Diary & Task report, for yourself.

1. Open Diary
2. Select the "Options" tab
3. Select the "Advance Filter" tab
4. Select the "Diary Group" tab located on the right hand side
5. *Group* Select (Logged in user)
6. Select the "Diary Filter" tab located on the right hand side
7. Select "Standard Filter" tab
8. Check that the logged in user is selected
9. Select "List" tab
10. File | Print | Combined Diary and Task

“Options” tab

11. Select the “Options” tab
12. *Date* Select the date range for the report

The report will include Diary entries and Tasks due from today until the date entered.

Alternately click on

Today

Yesterday

Tomorrow

to select the required date range.

13. *Report / Page break on employee code* Accept this

This only applies if you select more than one Employee on the “Employee” tab.

Ticked - This will print each selected Employee on a separate page.

Unticked – No page break between Employees.

14. *Print filter options?* Tick this

Ticked - This will enable you to see the Filter options you selected.

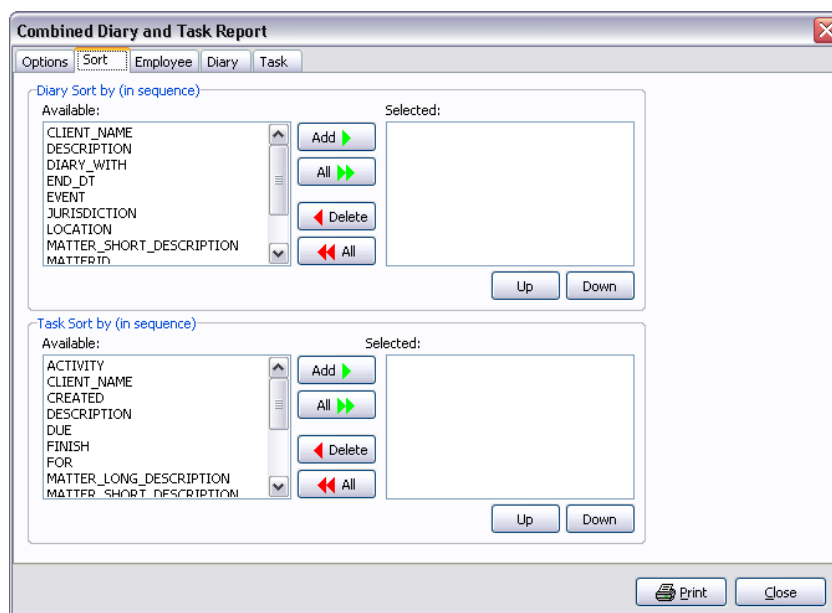
Unticked – Filter options will not be included.

“Sort” tab

The “sort” tab allows you to sort the Diary entries and Tasks to suit your requirements.

15. Select the “Sort” tab

The following screen displays:



16. *Diary Sort by (in sequence)* Select EVENT
17. Click on **[Add]**

You can select which columns will be included in the report by selecting a Column heading from the “Available” column and “adding” it to the “Selected” column. The Diary entries will be sorted according to the order in the “Available” column. You can then reorder the columns by selecting a heading and moving it UP or DOWN.

18. *Task Sort by (in sequence)* Select DUE

19. Click on **[Add]**

You can select which columns will be included in the report by selecting a Column heading from the “Available” column and “adding” it to the Selected column

The Tasks will be sorted according to the order in the “Available” column. You can then reorder the columns by selecting a heading and moving it UP or DOWN.

“Employee” tab

The “Employee” tab allows you to select which Employees will be included in the report.

20. Select the “Employee” tab

21. *Available* Select YSR

22. Click on **[Add]**

Highlight the Employees are to be included in the report.

OR

Select a Department or Employee Type.

“Diary” tab

23. Select the “Diary” tab

No changes are required here as all Diary Entries are to be included.

“Task” tab

24. Select the “Task” tab

No changes are required here as all Tasks are to be included.

Printing the Report

25. Click on **[Print]** to create the print display

This report will show all the Diary and Tasks for the selected user for the date selected.

9.12.2 Combined Diary & task (based on current filter settings)

This will print the Diary and task entries that are currently displayed, without the need to redefine the criteria.

A sample of a Combined Diary & Task Report is shown below:

Printed 4/03/2007 12:45:28 AM Page 1

Combined Diary and Task

18 January 2007
Thursday
For: YSR, Yvette S Rogers

Diary Appointments		Multiple Attendees	Matter ID	Event	Location	Jurisdiction	
10:00 AM	11:30 AM	No		Meeting	Our office		
3:00 PM	5:00 PM	No	012352	Meeting	Our office		
Tasks							
Activity	Description	Client Name	Matter ID	Matter Short Description	Due	Started Finish Priority	
Document Production	Send Demand Letter 2	Blackwell Scientific	010006	Recovery from Francis	10/12/2000		Normal
Email	Email client advising letter forwarded to Purchaser Solicitor enclosing Contract for Sale and Section 66W Certificate for completion by Purchaser	Gribble, Mr John	900232	Sale to Thompson	24/07/2000		Normal
Schedule	Risk Management File Review	Gribble, Mr John	900232	Sale to Thompson	24/07/2000		Normal
Decision	Exchange Date?	Gribble, Mr John	900232	Sale to Thompson	22/07/2000		Normal
Document Production	Send Demand Letter 1	Blackwell Scientific	900155	Debt from Hunter Recruitment	15/12/2000		Normal
Email	Notification of new file	Black Day Publishing	012399	Debt Recovery from Hams Publishing	15/07/2000		Critical
Email	Notification of new file	Black Day Publishing	012347	Debt Recovery from The Open Book	6/07/2005		Critical
Email	Notification of new file	Black Day Publishing	012326	Debt Recovery from Regents Bark Books	4/05/2005		Critical
Email	Notification of new file	Blackwell Scientific	900155	Debt from Hunter Recruitment	5/12/2006		Critical
Email	Notification of new file	Blackwell Scientific	010006	Recovery from Francis	7/04/2005		Critical
Email	Notification of new file	Department of	900030	Recovery from Fauldings	23/10/2000		Critical
Email	Notification of new file	Blackwell Scientific	900032	Debt recovery from Peters	20/10/2000		Critical
Email	Notification of new file	Gemini SH Hire	900034	Debt recovery from Fauldings	30/10/2000		Critical
Email	Notification of new file	Gemini SH Hire	900035	Debt recovery from Nat	30/10/2000		Critical
Email	Notification of new file	Blackwell Scientific	900046	Debt from Brown & Co Pty Limited	28/03/2000		Critical
Simple Task	Close file	Gemini SH Hire	900036	Debt from Browne	29/12/2000		Critical
Email	Notification of new file	Gemini SH Hire	900036	Debt from Browne	30/10/2000		Critical
Document Production	Send Demand Letter 1	Black Day Publishing	012347	Debt Recovery from The Open Book	12/07/2000	11/07/2000	Normal
Document Production	Send Demand Letter 2	Black Day Publishing	012347	Debt Recovery from The Open Book	17/07/2000		Normal
Decision	Has debt been received	Black Day Publishing	012347	Debt Recovery from The Open Book	1/06/2005		Normal
Document Production	Send Demand Letter 1	Black Day Publishing	012399	Debt Recovery from Hams Publishing	16/07/2000	15/07/2000	Normal
Document Production	Send Demand Letter 2	Black Day Publishing	012399	Debt Recovery from Hams Publishing	19/07/2000		Normal
Email	Send email to client advising debt still not recovered	Black Day Publishing	012399	Debt Recovery from Hams Publishing	7/08/2006	15/07/2000	Normal
Document Production	Send Final Letter of Demand	Black Day Publishing	012399	Debt Recovery from Hams Publishing	7/08/2006		Normal

Page 1 of 2 Affinity - Combined Diary and Task

9.12.3 List View

The List View selection will print the diary entries for today.

A sample of this report is shown below:

Printed 4/03/2007 12:46:42 AM Page 1

Diary

Diary for Yvette S Rogers (YSR) for the period 28/02/2007 to 4/03/2007

Author	Date	Location	Jurisdiction	Type
Matter	Contact	Description		
YSR	1/03/2007 10:00 AM	Our office		Instructions from new client
YSR	1/03/2007 3:00 PM	Our office		Potential Redundancies Advice
YSR	3/03/2007 11:50 PM	Our office		Potential Redundancies Advice
	012352			To discuss possible outcomes
	012352			To discuss progress of matter

9.12.4 Event Report

The Event Report will print the diary entries for today in a slightly different format.

The heading of the report is defined in Options | Reports.

A sample of this report is shown below

Court Commitments							Printed 4/03/2007 12:55:08 AM
Wednesday, 28 February 2007							
Venue	Matter	Time	Reason	Acting	With	Attending	
OUR OFFICE		12:30	LUNCH	YSR		YSR	
Also Attending: , ABC, AD, DAM, DUA, JO, JW, MER, MMC, RKD, R/C, TNP							
Saturday, 3 March 2007							
Venue	Matter	Time	Reason	Acting	With	Attending	
OUR OFFICE	012352 Potential Redundancies Advice: To discuss progress of matter	23:50	MEETING	MMC:YSR	Ares Military Research Pty	YSR	

9.13 Diary Toolbar



Go to Today

Will return the user to today's diary from another day



New Create a new Diary Entry



Open Open the highlighted diary entry



Delete Delete the highlighted diary entry.



New Task Create a new Workflow task.



Create a Fee

Open the Fee Creation screen.

If a diary entry is highlighted it will automatically turn the Diary Entry in to a Fee.



Open Matter

Open the matter for the highlighted diary entry.



Create Phone Message

Open the New Phone Message screen.



Delete Phone Message

Delete the highlighted Phone Message



Refresh Refreshes the Diary and Phone message information.



Print Prints the selected Diary

9.14 Resources

Resources can be allocated to Diary Entries. Examples of Resources are the various types of equipment that the firm owns. You can view which resources have been booked in Resource Bookings. You can also book resources within this function by opening a Diary Entry.

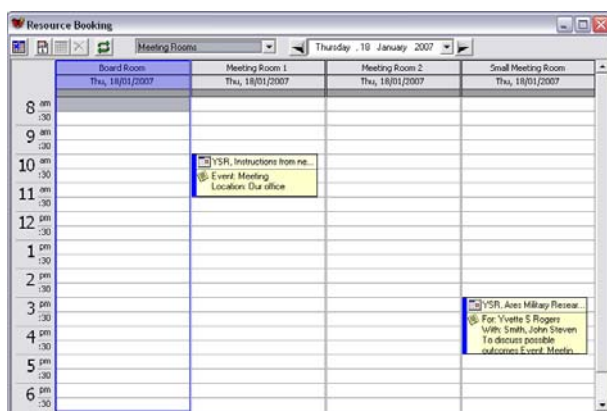



Hands on

In this exercise you will view the Resources Booking form and then reserve a venue for a seminar that is being held next month.

1. Open Resource Booking (Case Management | Diary)

The following screen displays:



2. Click on the drop down arrow or click on  to move to this time next week.
3. Select Meeting Rooms from the Resource Type list
Columns for each venue will be displayed.
4. Select the column for Meeting Room 1
5. Highlight the time approx 1 hour from now to 2 hours
ie Click on 10:00 and drag the mouse to 12:00 in the Meeting Room 1 column
The Diary Entry screen will display.
6. Complete the details for a Meeting in Our Office
Note that the time and resources have already been inserted.
7. Click on **[OK]**
8. Close the Resource Booking screen

10. *emPower* Precedents

emPower Precedents are libraries of precedents available from LexisNexis for different areas of law. The precedents available in Lexis Affinity Library will depend on the *emPower* libraries purchased by your firm. Because this will vary from firm to firm, the following section does not include Hands On exercises. Your instructor will lead you through exercises appropriate to the libraries your firm will use.

10.1 Attaching a Precedent Module to a Matter


To generate precedents against a matter, the precedent module or library must be attached to the matter. A precedent module can be attached to a matter in one of the following ways:

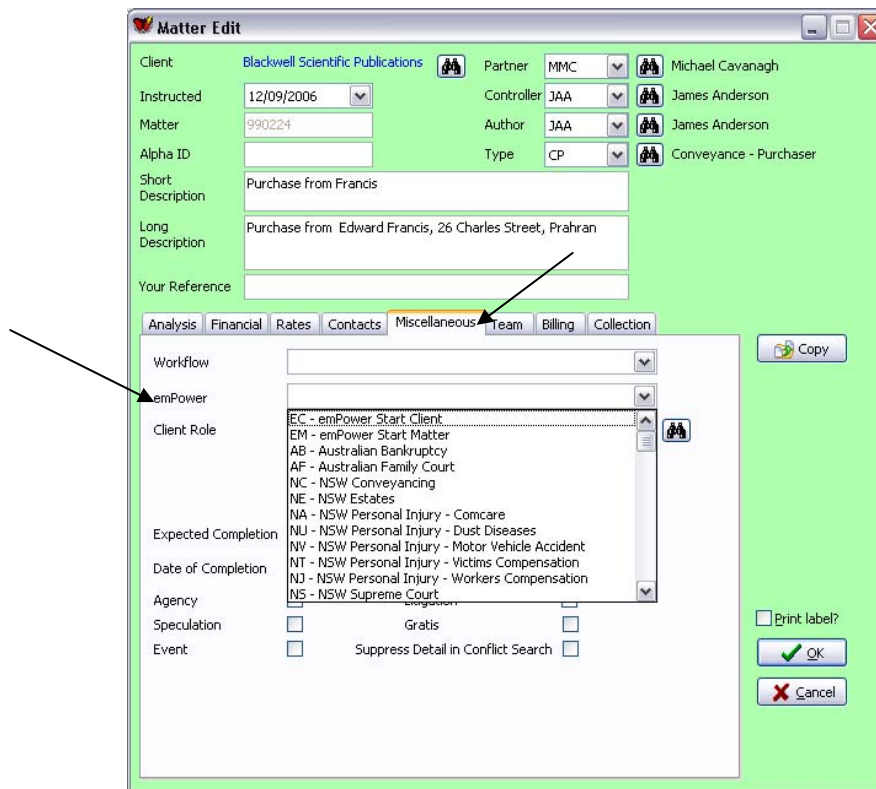
1. The module is automatically attached when the matter is created (due to setup of the Matter Type).
2. Edit the matter and attach the module.



Procedure

To attach a precedent module:

1. Open the matter and select the Edit Matter icon. 
2. Select the "Miscellaneous" tab.
3. Click on the down arrow beside the "emPower" input box.



4. Select **[OK]**.
5. The matter window will now display an “emPower” tab.



TIP: If there is no "emPower" tab present when you open a matter, it means that a precedent module has not been attached to this precedent (either manually or via the matter type).

10.2 Changing the Precedent Module attached to a Matter

You can change the precedent module attached to a matter. Follow these steps:

1. Open the matter and select the “emPower” tab.
2. Select the “Options” tab.
3. Select the module required in the “Module” field.

Matter: Blackwell Scientific Publications Purchase from Francis 990224

File Search Help

Matter: 990224 07 3590 9876 Partner: MMC Michael Cavanagh Entity: Lewisham Reid
 Client: BSP001 Blackwell Scientific Publications Controller: JAA James Anderson Branch: Melbourne - Lewisham
 Short Description: Purchase from Francis Author: JAA James Anderson Department: Conveyancing
 Type: CP Conveyance - Purchase Source Country:
 Long Description: Purchase from Edward Francis, 26 Charles Street, Prahran Date Instructed: 12/09/2005
 Date Completed:
 Your Reference: Archive

Diary | Precedents | Documents | Team | Tasks | History | Investments | Debt Control
 Debtors Letters | Trust Letters | Safe Custody | Unpresented Cheques | Research
 Balances | Contacts | Data | emPower | Bills | Receipts | W/Offs & Trfs | Graphs

NSW Conveyancing Search View Merge Run emPowerFam

Precedent | Power Pack | Security | Options | Filter

View Documents By: EmPower Module selection/information
 Number and Name
 Name and Number
 Module: NC - NSW Conveyancing
 Location: C:\emPower\NConv\NCGlobV3.pp

User Setup
 On open, scan directories for new or deleted files Refresh
 Show deleted files Set Colour
 Show deactivated files
 Show filter error
 Quick Search: Enable filter mode

10.3 Entering Data

The DataForm used to collect matter information for each emPower module will differ, as each precedent set requires different information.



Procedure

1. Open the matter and select the "emPower" tab.
2. Select the **[Run emPowerForm]** button.

The *emPower* data form will display, with the fields arranged within a series of pages.

Move between the pages by clicking on the **page tabs** at the bottom of the screen.

Move between each field by pressing the **<Tab>** key (forwards) and **<Shift><Tab>** keys (backwards) on the keyboard. You can also use your mouse to click directly into the field you require.

The screenshot shows a software window titled "emPower DataForm NSW Conveyancing - [Purchaser/s Details]". The window contains a form with the following fields:

- ** No. of Purchasers: [1]
- (1) Given/Coy Name: [] Last Name: []
- 'ABN': [] ABN No.: [] 'ACN': [] ACN No.: [] 'and': []
- (2) Given/Coy Name: [] Last Name: []
- 'ABN': [] ABN No.: [] 'ACN': [] ACN No.: [] 'and': []
- Others Full Names / 'ACN' / 'ABN' No.: []
- Tenancy: []
- Address Line 1: [] Address Line 2: []
- Salutation: [] Reference: []
- Present Address Line 1: [] Address Line 2: []
- Sub State Pc: []
- New Address Line 1: [] Address Line 2: []
- Sub State Pc: []
- Phone: [] Email: []
- Mobile: [] Fax: []
- Other Number: []

At the bottom of the form, there is a row of page tabs: Purchaser, Vendor, Solicitors, Owners/LineCoy/Surveyor, Firm, Property, Finance, Contact, User. A red box labeled "Page Tabs" is positioned over these tabs. Below the tabs are buttons for Refresh, Reload, OK, and Cancel. A validation message at the bottom reads: "Validation Data Type: TEXT (value is in TEXT)".

3. The fields on the DataForm are shaded in different colours:

White fields are free text fields. Enter text via the keyboard.

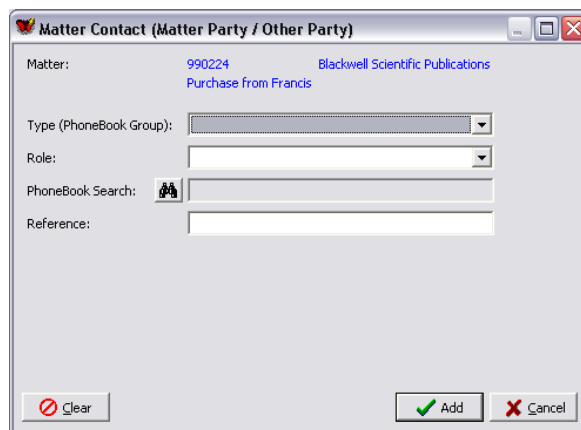
Yellow fields are Primary Linked fields: Enter data from linked Affinity tables such as the PhoneBook or Matter. You cannot enter text directly into these fields if they are linked to an existing phonebook record.

Grey fields are Associated Linked fields. These fields are automatically populated from linked Affinity tables. You cannot enter text directly into these fields if they are linked to an existing phonebook record.

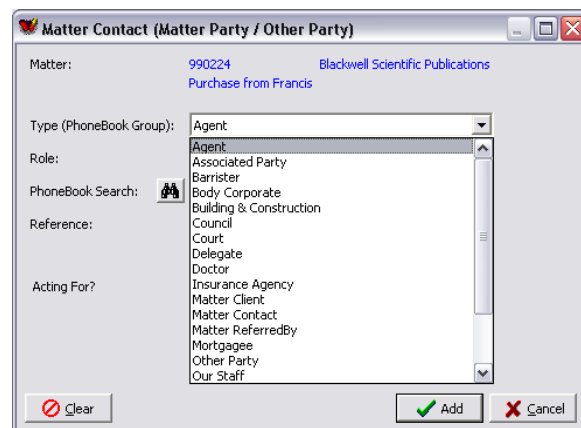
Pink fields are required fields.

Entering Data into Linked Fields

1. Double-click on a yellow field. The "Matter Contact" dialog box will display.

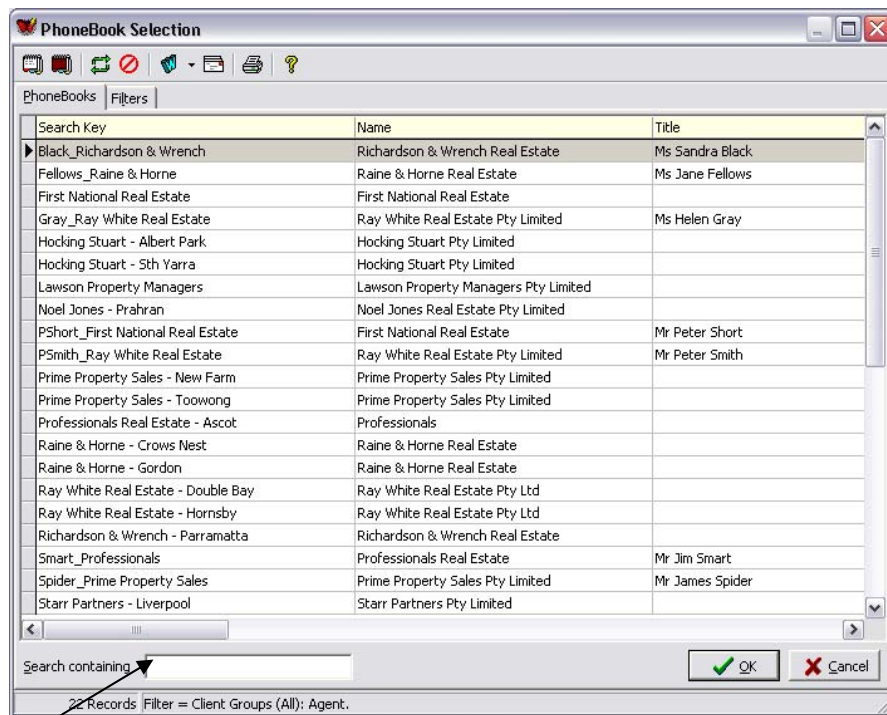


2. Click on the down arrow beside the "Type" box to select the type of contact you are looking for (eg. Solicitor).



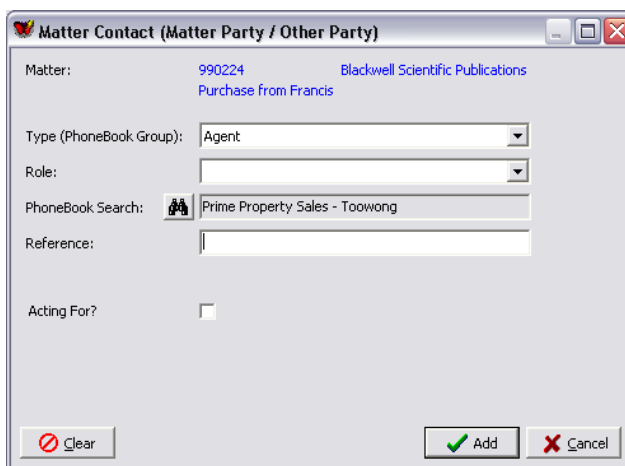
This will narrow down your selection criteria based on the PhoneBook groups. For example, if you nominate **Doctor** as the Type, you are narrowing down the PhoneBook search by displaying only those entries flagged as "Doctor" via the PhoneBook group.

3. Click on the binoculars to view all records for the selected **Type**.
4. When the PhoneBook Selection list is displayed, type in the "Search Starting With" text box and enter the first few letters of the name of the entry you are looking for.



TIP: Remember that the search will be based on the "Search" field data entered at the time the PhoneBook entry was created. You can also use the "Filter" tab to further narrow down your search.

- When you have found the entry required, double-click on the entry or highlight the entry and click [OK].



- The "Role" field is optional but recommended. This field allows you to nominate the role this contact has on this particular matter. For example, a particular doctor might be a witness for defendant 1, or a defendant in a medical negligence suit.

To assign a role to the selected contact, click on the drop-down arrow and select from the list of Roles.

7. The "Reference" field is optional but can be used to enter a reference for this contact. This is a free text field so you may enter whatever is appropriate for this contact (eg. reference for correspondence to this contact).
8. After completing this dialog box, select **[Add]**.

The *emPower* data form will display with the yellow and grey linked fields filled in for the selected contact.


9. If any of the fields are empty or display incorrect information, re-open the PhoneBook record and check that the details have been inserted correctly in the PhoneBook fields.

Amending the PhoneBook Record

If the correct details have not been inserted into the PhoneBook record, these will need to be amended. Follow the steps below to amend the PhoneBook record while working in the *emPower* DataForm. Note that you must have permission to make changes to the PhoneBook in order to perform this procedure.



Procedure

1. In the *emPower* data form, double-click on the yellow field containing the PhoneBook entry that requires modification.
2. Click on the PhoneBook binoculars button. The PhoneBook search list will display.
3. Highlight the relevant PhoneBook record then select the **Edit** button on the toolbar .

The full details of the PhoneBook record will display.

PhoneBook: Prime Property Sales - Toowong

File Search Help

Search Name Prime Property Sales - Toowong Code ID 160 Main/Work Phone 07 3870 2844

Correspondence Name Prime Property Sales Pty Ltd A.C.N. Facsimile 07 3870 2855

A.B.N. Mobile

Home Phone

Full Trading Name Prime Property Sales Pty Limited Direct/Other

Miscellaneous Bank Linked Records ID/Reg'n #'s Safe Custody

Addresses Document Details Data Notes Precedents Documents Diary Relationships Groups Associated Staff

Master Address

Link... Jump

Address Layout

Email toowong@primepropertysales. Email Remittance

Street/Postal/Registered Address

Street Postal Registered

Address 55 Sherwood Road

Suburb TOOWONG

State QLD Postcode 4066

Country AUSTRALIA Mail

DX

DX

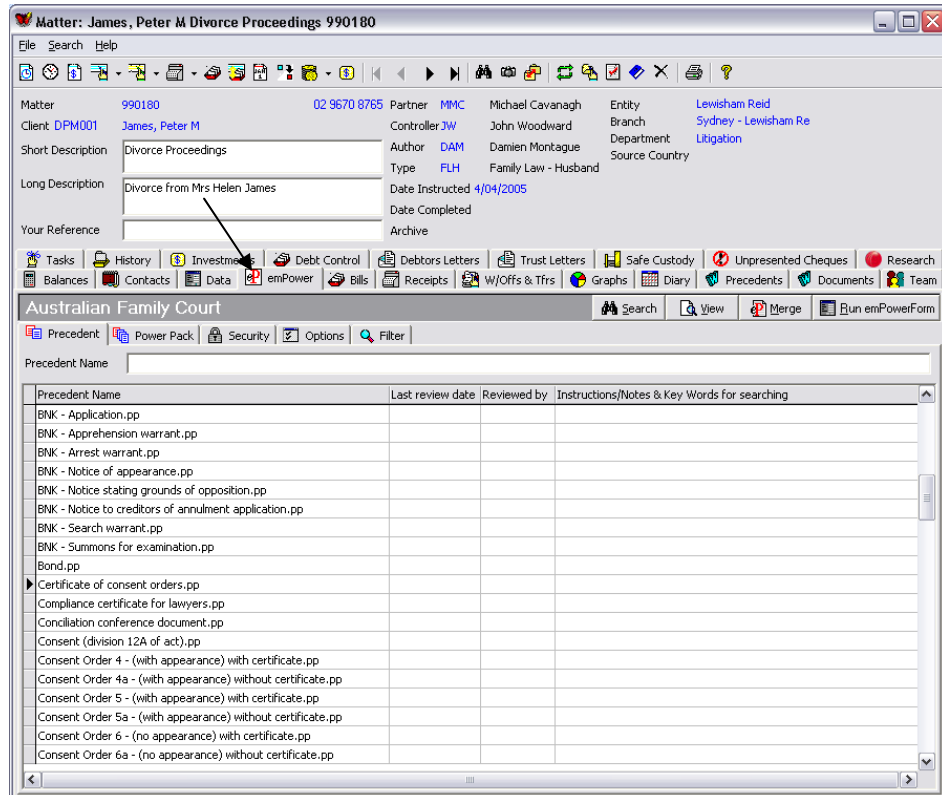
Location

State Mail

4. Edit the record as required.
5. Click on the green tick on the toolbar to save any changes and then close the PhoneBook entry.
6. Click on the **[Update]** button to return to the *emPower* data form. Any changes made to the PhoneBook entry will now be reflected in the *emPower* fields.

10.4 View Precedents and Generate Documents

1. Open a matter and click on the "emPower" tab.



2. The list of precedents for the precedent module attached will now display. In the above example, the Australian Family Court module has been attached; the precedent list shows all precedents within this module.

10.4.1 View a Precedent

To view a precedent in PDF format, highlight the precedent (you can scroll through the list or beginning typing the name in the "Precedent Name" box), then click on the **[View]** button. Alternatively right-click over the selected precedent and select **View....**



TIP: Do not commence generating documents until you have ensured that the data required for the document has been entered into the database. Entering data is covered in the next section of this reference.

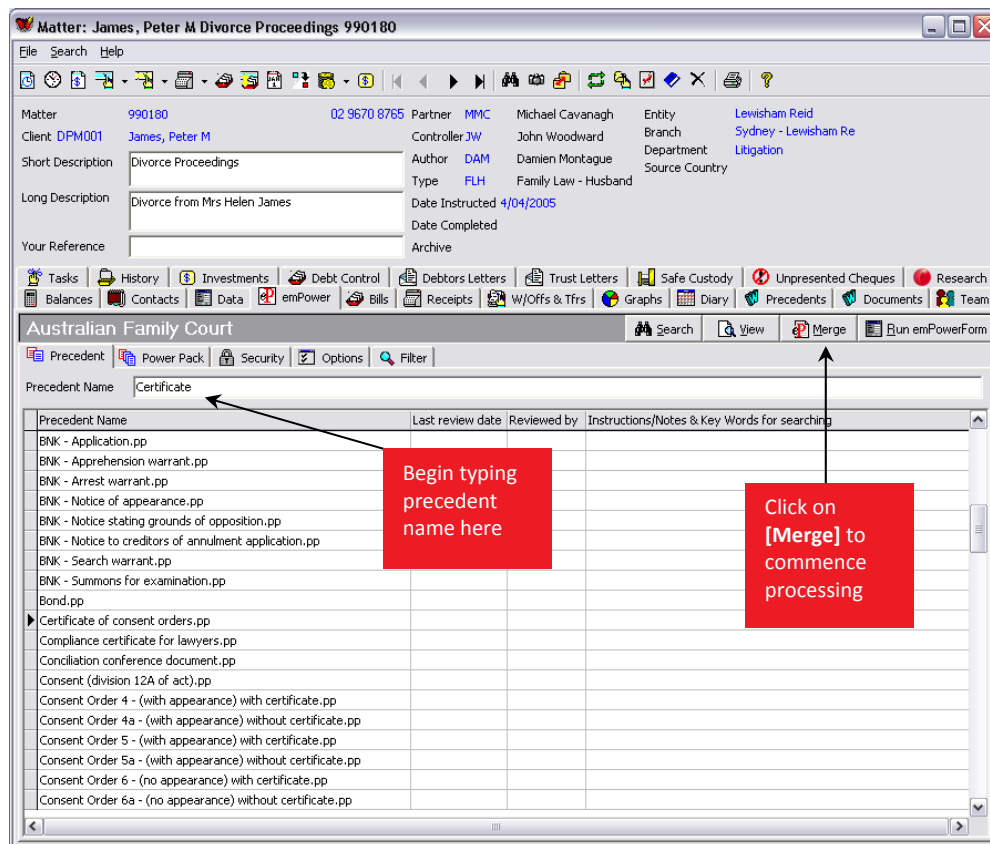
10.5 Generating Documents

The **emPower Merge** function will generate a document for the selected matter, based on a precedent in the list, and using the data stored in the **emPower** data form.



Procedure

1. Open the matter and select the “emPower” tab.
 2. Select the precedent required:
 - Scroll through the precedent list and click on the document to be merged
- OR**
- Click into the "Precedent Name" box and begin typing the name of the document.



3. When you have selected the required document, click on the **[Merge]** button (or double-click on the precedent name).
4. If there are any questions or prompts for this document, these will now be displayed on the screen. Answer all questions and prompts.
5. On completion of all questions, the Power Check window will display:

990180

Field Description	Field Value
FirmPtnr Direct Fax	02 9255 1030
FirmPtnr Direct Email	
Husband First Name	Peter
Husband Middle Name/s	Michael
Husband Last Name	James
Husband or Father	Husband
Husband Full name on marriage certificate	
Husband Addressee	Dr James
Husband Salutation	Dr James
Husband Address Line 1	18 Collins Street
Husband Address Line 2	
Husband Sub State Pc	BLAKEHURST NSW 2221

Save changes to Client Information File

Merge **Cancel**

You can click into the field grid and tab through the fields on the Power Check screen and insert or change the data if required. Any data that is added or modified will be written back to the *emPower* DataForm as long as the checkbox beside "Save changes to Client Information File" is ticked.

NOTE: Some fields cannot be modified in the Power Check window. Those fields that display with grey shading are linked fields and can only be modified from within the *emPower* data form or via the linked PhoneBook record directly.

6. Click on the **[Merge]** button at the bottom of the Power Check window to proceed with merging the document. On completion, the document will display in your word processor.
7. You can now edit / review / print / save this document as required.

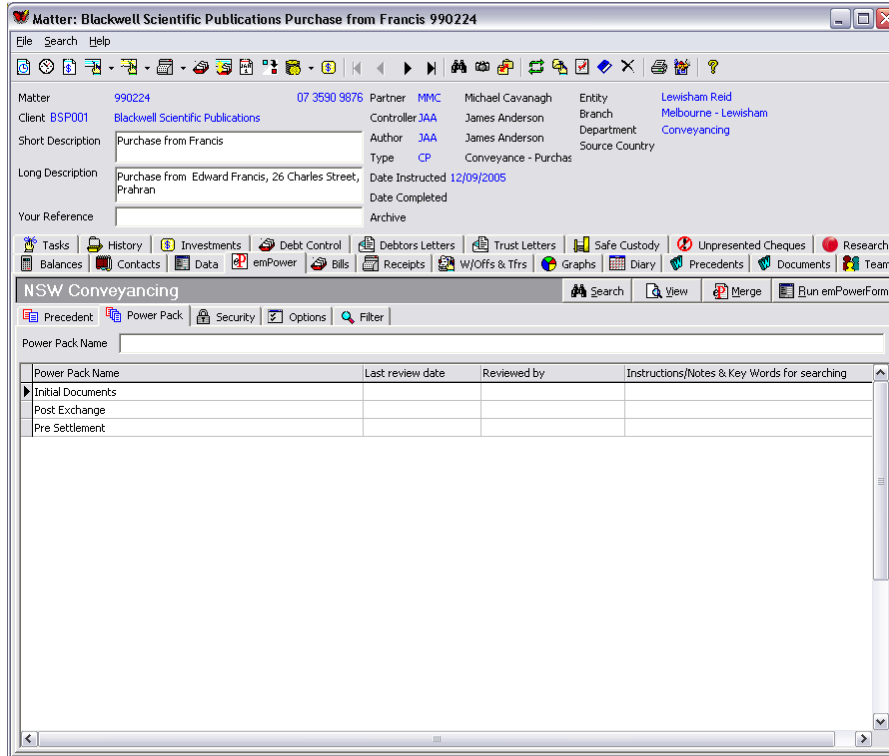
10.6 Merging a Power Pack

A Power Pack is a sub-set of *emPower* documents that can be merged as a group with an individual matter number. Power Packs are useful where certain documents tend to be required at the same time. Rather than individually selecting these documents, a "pack" of documents can be created, which speeds up the production process.

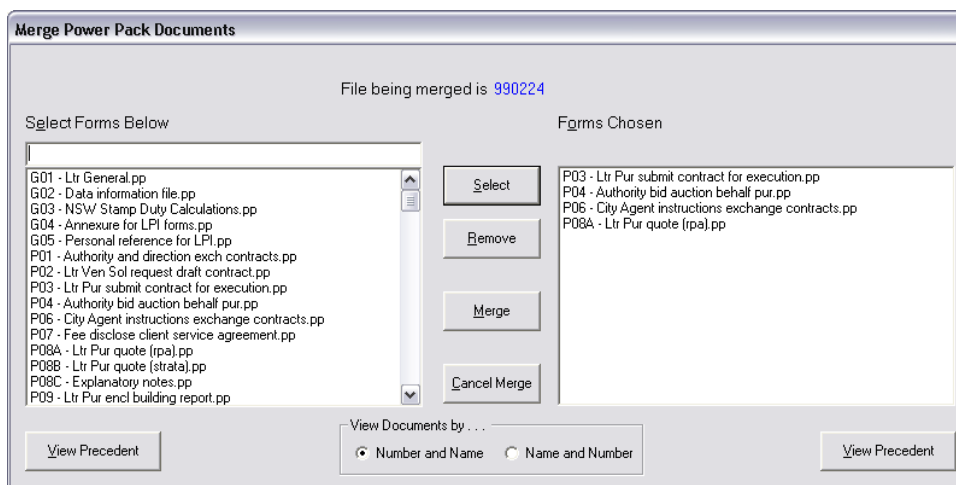
Your System Supervisor will oversee the creation of Power Packs on your system.

To merge documents using a Power Pack:

1. Click on the “Power Pack” tab to view all currently available Power Packs.



2. Select the Power Pack to be merged.
3. Click the **[Merge]** button or double-click on the selected precedent.
4. The *emPower* document selection screen will display, showing the documents within the pack on the right-hand side of the screen.



5. You now have the option to add extra documents that may be required (double-click the document from the “Select Forms Below” list) or remove documents that are not required (double-click the document from the “Forms Chosen” list).
6. Once you have finalised your selection, click on the **[Merge]** button.
7. The Power Check window will then display. Review and update the data as required.
8. Click on the **[Merge]** button to generate the documents.

10.7 Merging Several Documents

It is possible to merge a number of different precedents at one time. The precedents selected will generate separate documents in your word processor, using the data from the *emPower* data form for the current matter.



Procedure

1. Locate the first document to be merged, hold down the **[Ctrl]** key on your keyboard and select this document.
2. Select subsequent documents by continuing to hold down the **[Ctrl]** key on your keyboard and, at the same time, selecting each document with a left mouse click.
3. Click on the **[Merge]** button.
4. If there are any questions or prompts for these documents, these will now be displayed on the screen.
5. The Power Check window will then display.

You can move through the fields on the Power Check screen and change the data. This changed information will be written back to Affinity. However, some fields may display with the text in grey. This indicates that this field cannot be changed prior to merging. If you need to change/update the information you must return to Affinity and make the change in the appropriate screen.

6. Click on the **[Merge Continue]** button.

Affinity will gather the required data and display the completed documents in Word.

7. You can now edit / review / print / save these documents as required.

10.8 Multi *emPower* Documents


There may be times when you wish to merge a single document with multiple matters.

This can be useful in areas such as conveyancing where you may wish to address a letter to a range of purchasers of a unit block (in this instance the matters are related to each other). Alternatively, you may wish to address a document to a range of parties who may not be related, other than by matter type (eg. a letter advising a change to contact to a range of Family Court matters).



Procedure

This procedure requires you to first select the matters required and then to select the *emPower* document to merge with these matter.

1. Click on the **Matters** button from the Lexis Affinity Library Toolbar.
2. When the "Matter Selection" window displays, click on the **Filter** tab.
3. Click on the  button on the filter screen.
4. You may enter any criteria in the "Filter" window, but you **must** select a module in the *emPower* field.

NOTE: You cannot perform an *emPower* multi-merge across different *emPower* modules. All matters selected must have the same *emPower* module attached. This is because the data available for merging varies across each module.

5. Click on the "Matters" tab to display your selection.
6. You may now further narrow your selection by highlighting selected matters in the results list (use <Ctrl>+Click to select multiple matters) OR leave the result list as is.
7. Select **File | emPower | Multi Select Merge**.



TIP: The "*emPower*" option will not display on the File menu if you have not entered an *emPower* module in the "Filter" window.

8. Choose from either "Matters – Selected" OR "Matters – All".



TIP: "Matters – All" refers to all matters in the current filter selection. "Matters – Selected" refers to the matters which are highlighted in the current filter selection.

9. Select an *emPower* precedent from the precedent/document list.
10. Click on [OK] to generate the documents.

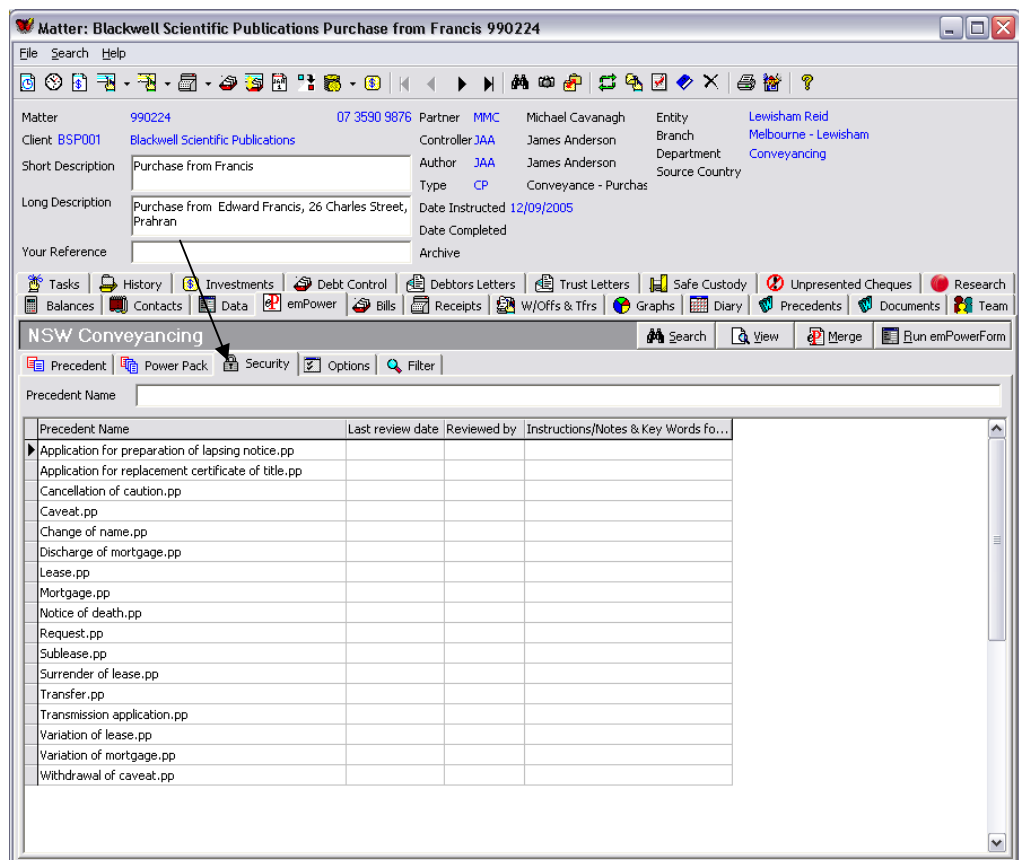
10.9 Merging a Security Document

Some *emPower* modules contain security documents. If security documents are available for a particular module, an extra tab will display in the *emPower* window, called "Security".

Security documents cannot be amended in Word once they have been generated (as is generally required by the Authority supplying these documents). For example, a number of security documents are available in the NSW Conveyancing module, including a Transfer, Discharge of Mortgage and Caveat, to name a few. If the data inserted in these documents is incorrect, you must correct the details at their source (ie. the Lexis Affinity Library PhoneBook or the *emPower* data form) and then merge the document again.

To produce a security document:

1. In the *emPower* window, select the "Security" tab to view the security documents.



2. Double-click on the document to be merged.
3. If there are any questions or prompts for this document, these will now be displayed.

4. On completion of all questions and prompts, the Power Check window will display:

You can move through the fields on the Power Check screen and change the data if required. Any details changed will be written back to the Lexis Affinity Library database.



TIP: Remember that fields displayed in *GREY* in the Power Check window cannot be modified here as they are linked fields. These fields can only be modified at their source (usually, the PhoneBook).

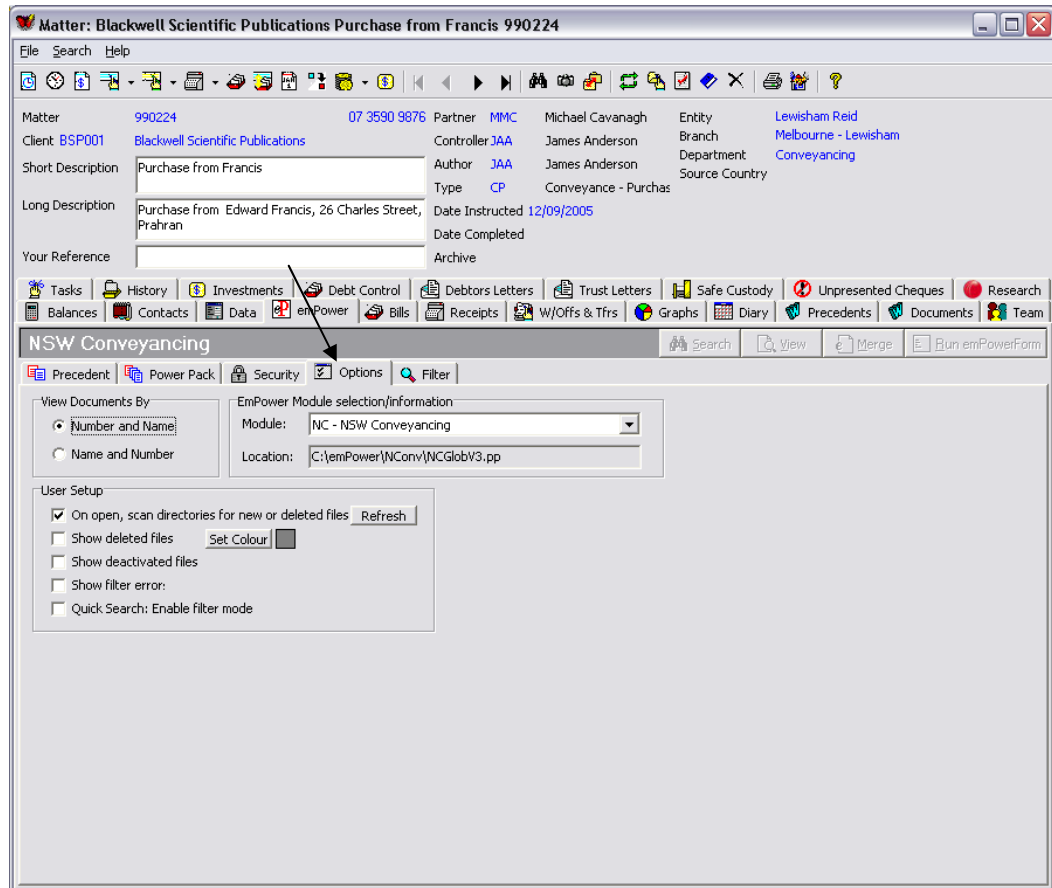
5. Click on the **[Merge]** button to continue.

Affinity will gather the required data and display the completed document in Word

6. You may now save and print the document. You may not edit the details in the merged document.

10.10 Merge Options

The "Options" tab provides a number of functions to control how the list of precedent documents displays under the "Precedent" tab. Each user may set their own options.



View Documents By

The Precedents list may be listed either with the precedent name first, or with the precedent number first. Note that when you change this option, it will change the order in which precedents are displayed in the list, and will affect how you use the filter options to search for documents.

emPower Module Selection/Information

This option shows the *emPower* module that is currently attached to the matter, and also allows users to change the module attached. To change the module:

1. Click on the drop-down arrow beside the module name to display the list of precedent modules.
2. Select the module required.
3. Select the "Precedent" tab to display the precedents for the selected module.



TIP: You must have sufficient rights in order to do this. If you do not have the ability to change emPower modules as shown above please contact your Affinity administrator.

User Setup

- On open scan directories for new or deleted files

Tick this check box to have Lexis Affinity Library update the precedent list every time emPower is selected.

- Show Deleted Files

Tick this check box to display documents that have been deleted in the Precedent list. You may also set a different colour for deleted files.

- Show Deactivated Files

Tick this check box to display precedents that have been "deactivated" by your precedent administrator. These files have not been deleted but the administrator has flagged them as not active. This may be because they are not yet ready for use, or because they are no longer required.

- Show Filter Errors

Check this box to display errors when using the filter options.

- Quick Search: Enable Filter mode

The precedent list has a "Name" box which can be used to quickly find a precedent. There are two ways to use the "Name" box:

- (i) Begin typing the name of the precedent, and the Lexis Affinity Library will jump to that precedent in this list. (The "Quick Search" checkbox must be left unchecked for this mode).
- (ii) Check the "Quick Search" box to turn filter mode "on". When you type characters in the "Name" box, the precedent list will be filtered accordingly. For example, type *ltr in the "Name" box to display all precedents with those characters contained in the name.



TIP: If you are searching for a string within the precedent name, it is important to use the *wildcard. If you omit the wildcard, Affinity will return all files that begin with the characters entered.

10.11 Filter

The "Filter" provides more advanced functionality for filtering the precedent list. Each precedent may be set up with a number of properties entered against it such. For example, the author, who last reviewed the precedent, the review date, and any keywords or comments. Some of these properties are displayed in the precedent list, others not. The "Filter" tab provides a method for filtering precedents based on these properties.

11. DataForms

DataForms are an extension to the Lexis Affinity Library database. They are used to record extra information about clients, matters, PhoneBook records and matter contacts.

Each firm will have different requirements for collecting details about the people with whom they deal. DataForms allow your firm to capture these extra details in addition to the common fields provided in Lexis Affinity (such as name, address, phone number, fax number and so on)

DataForms are used for a variety of purposes: For example:

- For use with word processing precedents;
- To generate reports;
- To carry out marketing activities;
- To provide additional search or filtering capabilities.
- To set up client profiles;
- To perform and record client surveys.

11.1 Matter DataForms

To access matter DataForms:

1. Open a matter.
2. Select the "Data" tab.

Matter: Black Day Publishing Pty Ltd Debt Recovery from Harris Publishing 012399

File Search Help

Matter 012399 02 9521 1234 Partner MER Melissa Ryan Entity Lewisham Reid
 Client BDP-001 Black Day Publishing Pty Ltd Controller MER Melissa Ryan Branch Brisbane - Lewisham
 Short Description Debt Recovery from Harris Publishing Author YSR Yvette S Rogers Department Dust Disease
 Long Description Debt Recovery from Harris Publishing Type DEBT Debt Recovery Matter Source Country
 Your Reference Date Instructed 15/12/2006
 Date Completed
 Archive

Tasks History Investments Debt Control Debtors Letters Trust Letters Safe Custody Unpresented Cheques
 Balances Contacts Data Bills Receipts W/Offs & Trfs Graphs Diary Precedents Documents Team

DataForms Copy DataForm Run

Debt Recovery DataForm

Debt Recovery

Amount of Debt \$12,000.00
 Date Debt Incurred 12th February 2003
 Description of Debt Publications
 Secretary's Name Patricia Carew
 Secretary's Direct Telephone 09678 7112
 Client's Invoice Number 09876

Data Entered + Add - Save Refresh

Click on the DataForm icon to display this DataForm or DataForm Collection

DataForm Collections

DataForms can be displayed as single forms or can be grouped with other DataForms to give you quick access to a group of related information.

If you display a DataForm Collection, the DataForms that make up the Collection are displayed as tabs across the top of the DataForms window.

The icons for a single DataForm and a DataForm Collection are different:



Single DataForm



DataForm Collection

The example shown again below (for matter 012394) shows a *DataForm Collection* called "General Matter Details". It contains four DataForms: General Matter Information; Claim Details; Barrister Details for Matter; General Appointments.

To move between the DataForms in a Collection, simply click on the tab to display the DataForm required.

11.2 Entering Details into a DataForm


In this exercise you will enter details into a DataForm on a family law matter.



Hands On

1. Open matter **990180** (*Divorce Proceedings*).
2. Select the "Data" tab.
3. Select the "Family Proceedings" DataForm Collection.

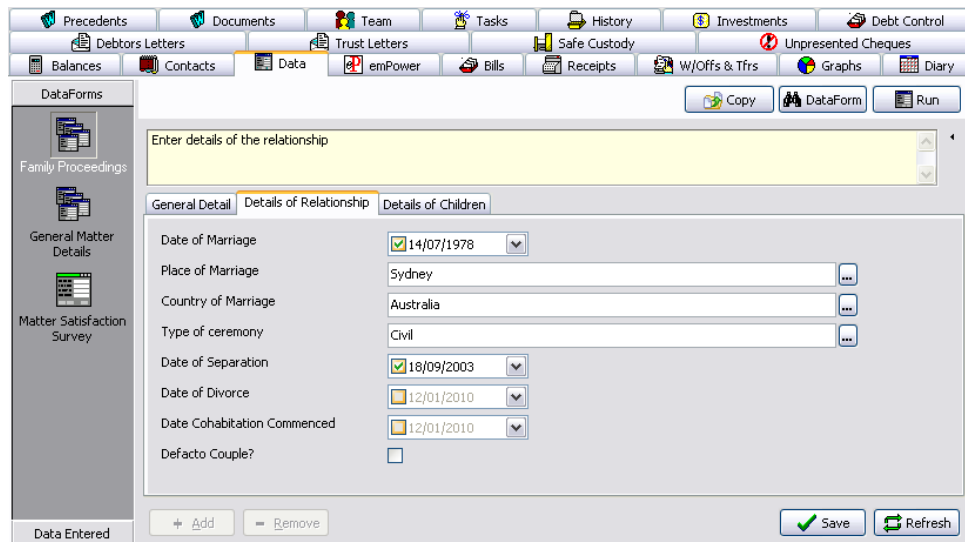
There are three pages to this DataForm; the first page will display.

4. *Filed in:* defaults to "Family Court of Australia". Leave these details.
5. Press the <TAB> key to move to the next field.
6. *File on behalf of:* select "Respondent".
7. Select 



TIP: You should save regularly as you are completing DataForm fields.

8. Select the “Details of Relationship” tab.



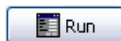
The screenshot shows a software interface with a menu bar at the top containing items like 'Precedents', 'Documents', 'Team', 'Tasks', 'History', 'Investments', and 'Debt Control'. Below the menu is a toolbar with icons for 'DataForms', 'Copy', 'DataForm', and 'Run'. The main area is titled 'Enter details of the relationship' and has three tabs: 'General Detail', 'Details of Relationship' (which is selected), and 'Details of Children'. The 'Details of Relationship' tab contains the following fields:

- Date of Marriage: 14/07/1978 (with a checkmark icon)
- Place of Marriage: Sydney
- Country of Marriage: Australia
- Type of ceremony: Civil
- Date of Separation: 18/09/2003 (with a checkmark icon)
- Date of Divorce: 12/01/2010
- Date Cohabitation Commenced: 12/01/2010
- Defacto Couple?:

At the bottom of the form are buttons for '+ Add', '- Remove', 'Save', and 'Refresh'.

9. *Date of Marriage*: 16 April 1978
10. *Place of Marriage*: Sydney
11. *Country of Marriage*: Australia
12. *Type of Ceremony*: Civil
13. *Date of Separation*: 14 July 2005
14. *Date of Divorce*: 28 September 2006
15. *Date Cohabitation Commenced*: 16 April 1978
16. *Defacto Couple?*: No (leave the box unticked)
17. Select 

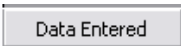
Alternative Method

Display the DataForm and then click on the  button.

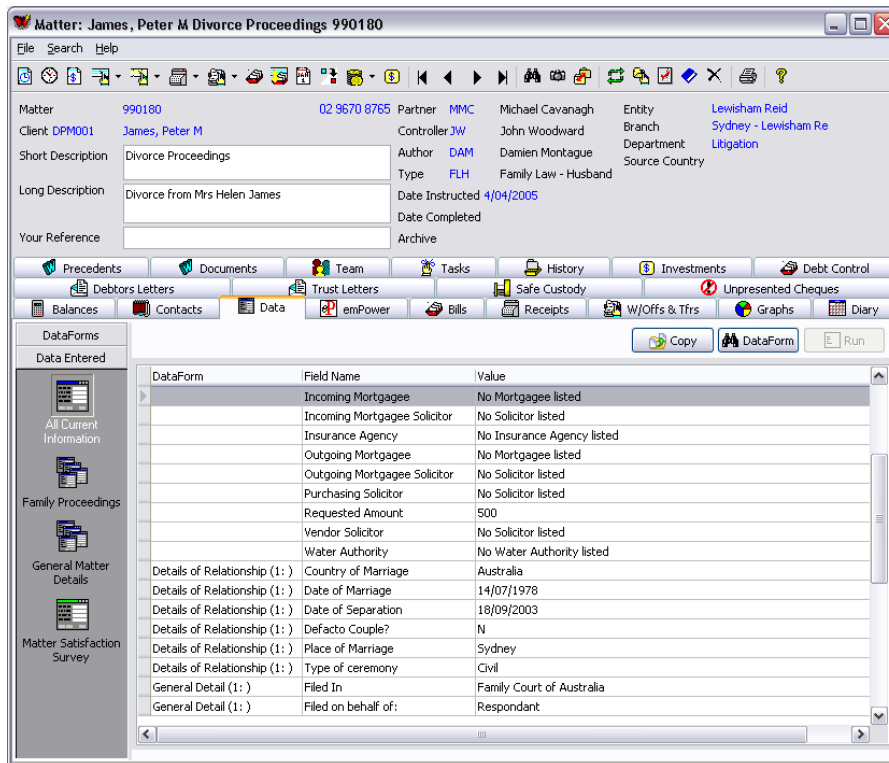
This will display the DataForm in its own window. When you have finished entering data, click on the **[OK]** button to return to the main window.

Data Entered

Details that have been entered into a DataForm can be viewed in one of two ways:

1. Display the DataForm OR click on 

Using the "Data Entered" view shows the details entered in a list format.



DataForm	Field Name	Value
	Incoming Mortgagee	No Mortgagee listed
	Incoming Mortgagee Solicitor	No Solicitor listed
	Insurance Agency	No Insurance Agency listed
	Outgoing Mortgagee	No Mortgagee listed
	Outgoing Mortgagee Solicitor	No Solicitor listed
	Purchasing Solicitor	No Solicitor listed
	Requested Amount	500
	Vendor Solicitor	No Solicitor listed
	Water Authority	No Water Authority listed
Details of Relationship (1:)	Country of Marriage	Australia
Details of Relationship (1:)	Date of Marriage	14/07/1978
Details of Relationship (1:)	Date of Separation	18/09/2003
Details of Relationship (1:)	Defacto Couple?	N
Details of Relationship (1:)	Place of Marriage	Sydney
Details of Relationship (1:)	Type of ceremony	Civil
General Detail (1:)	Filed In	Family Court of Australia
General Detail (1:)	Filed on behalf of:	Respondant

The list has three columns:

DataForm: Displays the name of the DataForm that the field belongs to. The "DataForm" column is blank for some fields as these DataForm Fields are "shared". For more information on shared fields, see page 238.

Field Name: The name of the DataForm field.

Value: The details that have been entered into the field.



Hands On

In this exercise, you will complete the "Barrister Details" DataForm for matter **990180** and then view the data entered in list format.

1. Open matter **990180**.
2. Select the "Data" tab.
3. Select the "General Matter Details" DataForm Collection.
4. Select the "Barrister Details for Matter" tab.

Matter: James, Peter M Divorce Proceedings 990180

Matter 990180 02 9670 8765 Partner MMC Michael Cavanagh Entity Lewisham Reid
 Client DPM001 James, Peter M Controller JW John Woodward Branch Sydney - Lewisham Re
 Short Description Divorce Proceedings Author DAM Damien Montague Department Litigation
 Long Description Divorce from Mrs Helen James Type FLH Family Law - Husband Source Country
 Date Instructed 4/04/2005 Date Completed Archive

General Matter Information Claim Details **Barrister Details for Matter** General Appointments

Barrister's Details No Barrister listed

Date Barrister Briefed 12/01/2010
 Date Opinion Received 12/01/2010
 Date of Hearing 12/01/2010

Data Entered

5. Select the barrister being briefed for this matter by clicking on . The Contacts List dialog box will display listing all the Barristers currently attached to the matter (this list should be empty).


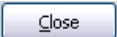
DataForm Matter Contact (Matter Party / Other Party) Editor

Matter 990180 James, Peter M
 Category Barrister Divorce Proceedings
 Role



Contacts List

Type	Role	Name	Phone	Title

6. Select

7. The PhoneBook Group of "Barrister" has already been entered and cannot be changed.
8. *Role*: leave blank.
9. Click on the binoculars button and select "J C Sparrow QC" from the list of barristers.
10. Select 
11. Select  to return to the DataForm.

The words "1 Barrister Listed" will display on the DataForm.

12. *Date Barrister Briefed*: 14 July 2006
13. *Date Opinion Received*: 18 October 2006
14. *Date of Hearing*: 23 May 2007
15. Select 
16. Use the  button to display all the details entered so far for this matter.
17. Select the "Barrister Details for Matter" icon to display only the barrister details in list format.
18. Close the matter window.

11.3 Multi-Instance DataForms

Some DataForms are *multi-instance*, meaning they can be used multiple times on a particular matter or client.

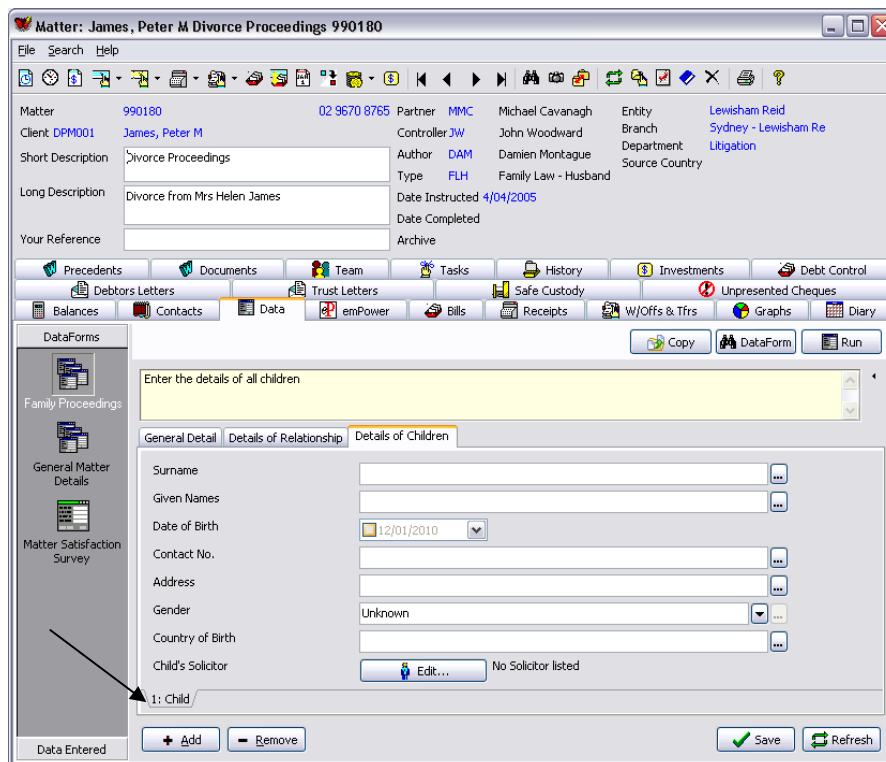
If a DataForm is multi-instance, you will see a numbered tab displayed at the bottom of the DataForm (see below).



Hands On

1. Open matter **990180**.
2. Select the “Data” tab.
3. Select the “Family Proceedings” collection.
4. Select the “Details of Children” tab.

This is a multi-instance DataForm, as indicated by the numbered tab at the bottom.



The screenshot shows a software window titled "Matter: James, Peter M Divorce Proceedings 990180". The window contains a data entry form with various tabs and fields. The "DataForms" sidebar on the left has a tab for "Family Proceedings" which is selected. Within this section, the "Details of Children" tab is active. The form fields include:

- Surname: [Text Field]
- Given Names: [Text Field]
- Date of Birth: [Date Picker (12/01/2010)]
- Contact No.: [Text Field]
- Address: [Text Field]
- Gender: [Dropdown (Unknown)]
- Country of Birth: [Text Field]
- Child's Solicitor: [Text Field (No Solicitor listed)]

At the bottom of the form, there is a tab labeled "1: Child" and buttons for "+ Add", "- Remove", "Save", and "Refresh".

5. Complete the details for the first child as follows.
6. *Surname:* James
7. *Given names:* Daniel Peter
8. *Date of Birth:* 1 July 1989
9. *Contact No:* 02 9804 1234
10. *Address:* 1 Collins Street, Blakehurst NSW 2221
11. *Gender:* Male
12. *Country of Birth:* Australia

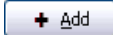
13. *Child's Solicitor*: select Zipkis & Solari

14. Select 

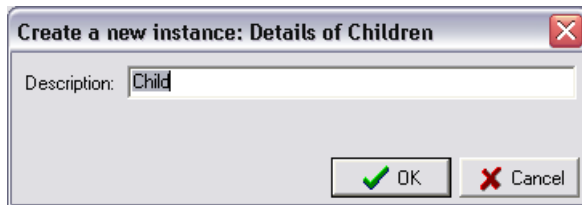
Add a New DataForm Instance



Hands On

15. Click on the  button to add a new instance.

16. A dialog box will display to allow you to add a label to this instance:



17. Enter "Child 2" as the description for the instance then select **[OK]**.

A blank DataForm will display, and the tab at the bottom of the window will show the description entered.

18. Complete the details for the first child as follows.

19. *Surname*: James

20. *Given names*: Harrison Michael

21. *Date of Birth*: 14 September 1998

22. *Contact No*: 02 9805 6634

23. *Address*: 13 Fawkner Street, Carlton NSW 2218

24. *Gender*: Male

25. *Country of Birth*: Australia


26. *Child's Solicitor*: leave blank

27. Select 



TIP: You may enter as many instances of a DataForm as you need.

28. Enter details for a third child, as follows:

29. *Surname:* James
30. *Given names:* Amanda Rose
31. *Date of Birth:* 8 January 2001
32. *Contact No:* 02 9805 6634
33. *Address:* 13 Fawkner Street, Carlton NSW 2218
34. *Gender:* Female
35. *Country of Birth:* Australia
36. *Child's Solicitor:* leave blank
37. Select 

Modifying the Instance Description

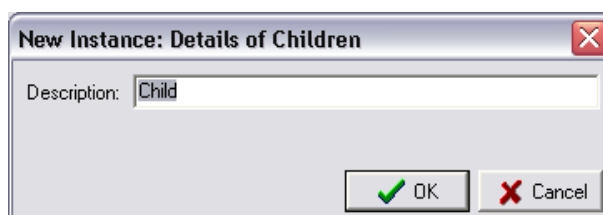
You may change the description of an instance to make it more meaningful.



Hands On

In this exercise, you will modify the instance descriptions to the children's first names.

1. Right-click on the first instance tab.
2. Select **Edit**. The "Description" dialog box will display:



The screenshot shows a dialog box titled "New Instance: Details of Children". It has a close button (X) in the top right corner. The "Description:" label is followed by a text input field containing the word "Child". At the bottom of the dialog, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

3. Enter "Daniel Peter" as the description and then select **[OK]**.
4. Modify the description for the second and third instances to the children's given names (*remember to select the instance first ie. display the instance before right-clicking the instance tab*).

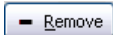
NOTE: Multi-instance DataForms may already have default descriptions for each instance. These default descriptions may be modified but check with your System Administrator first to check you are following office procedure.

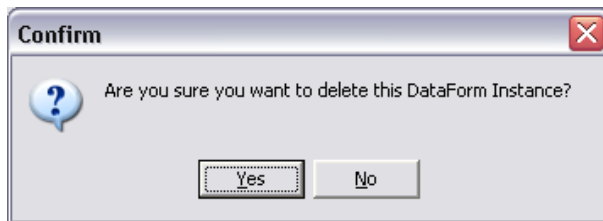
11.3.1 Remove a DataForm Instance


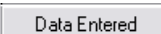


Hands On

In this exercise, you will delete a DataForm instance.

1. Select the instance tab for “Amanda Rose” to display this instance (*it is important to display the instance before trying to remove it*).
2. Select the  button at the bottom of the window. The following message will display:



3. Select **[Yes]**.
4. Select .
5. Select  to view the details entered for this matter in a list format.
6. Close the matter.



DISCUSSION

Shared Fields

DataForm fields may be *shared* or *unique*. When a DataForm field is shared the information contained in that field follows the field wherever it appears. This means that if the same field is contained in multiple DataForms, the information is shared across those DataForms. Similarly, if the field is contained within a multi-instance DataForm then the information in that field is carried across to the new instances of the DataForm. If you change the value of the field in one DataForm, the value is also changed in the others.

When a DataForm field is unique (ie. not shared) then the same field could contain different information on each DataForm. For example, a Family Law DataForm contains a field used to capture the date of birth of a child. This field would not be shared because each new instance of the DataForm will relate to a different child which, in most cases, require a different date of birth to be entered.

11.4 Additional Information

Field Types

There are a number of different *types* of fields that can be found on a DataForm. The type of field controls how it looks on the screen, and what data you will be allowed to enter into it.

Text:	Allows any alphanumeric characters to be entered.
Integer:	Allows any whole number to be entered.
Number:	Allows any number to be entered.
Date:	Allows a date to be entered via a date selection box.
Currency:	Allows numbers to be entered which will be formatted as currency.
Check Box:	Displays a checkbox.
Matter Party:	Displays a button which enables selection of a matter party from the PhoneBook. This will populate the "Contacts" area.
Script:	Displays a button which runs a custom script

Rules and Formatting

In addition to type, fields may also have *rules* and *formatting* applied to them.

For example:

A currency field may have a format applied which controls the number of decimal places to display.

A date field may have a format applied which controls how the date will display (eg. 19/10/2006 or 19 October 2006).

A text field can have a maximum number of characters that may be entered into it. The maximum number of characters for each field is determined by your firm's DataForm developer.

Lookups

Fields can also be set as *Lookup* fields. This means that a drop-down list of items will display for you to select from.

Some lookup fields are restricted so that only an item in the list may be used to populate the field. Other lookup fields will allow you to enter your own alternative data. This alternative data may be added to the list so it can be used again.

12. Lexis Affinity Precedents

Word processing precedents may be generated from inside Lexis Affinity Library from the PhoneBook, Client, Matter and Matter Contacts windows. Precedents can also be generated via a Workflow Task.

When precedents are created on your system, your precedents administrator will decide where each precedent should be available (matter, matter party, client, PhoneBook). A precedent will only display in the PhoneBook window, for example, if it has been flagged as a PhoneBook precedent.

12.1 Displaying Precedents on a Matter



Hands On

1. Open matter **012399**.
2. Select the "Precedents" tab.

The screenshot shows the Lexis Affinity software interface for matter 012399. The 'Precedents' tab is active, displaying a list of precedents. The 'Categories' pane on the left shows 'Debt Recovery' selected. The 'Precedent List' table is as follows:

Icon	Description	Code	Precedent Category	Comments
	Client Complaint Record	131	General	
	Cost Agreement Letter to Client.dot	117	General	
	Demand1.dot	136	Debt Recovery	
	Demand2.dot	137	Debt Recovery	
	Demand3.dot	138	Debt Recovery	
	Fax	164	General	
	File Note	165	General	
	First Letter to Client	55	General	

The precedents available for this matter will be listed. The Categories pane on the left-hand side of the window shows all precedent categories available for this matter. This is based on Matter Type.

3. Click on *Debt Recovery* in the Categories pane.

Now the precedent list shows only Debt Recovery precedents.

4. Click on *All Categories* in the Categories pane.

The precedent list will show all precedents available for this matter.

5. Close the matter window.



TIP: Click on the  button to display a list of all precedent categories. By default this will display only the categories made available to the selected

matter type. Click on the  button to clear the filter allowing you access to all categories. Select the required category then click **[OK]**.

12.2 Generating a Document for a Matter



Hands On

In this exercise you will send a letter to your client regarding their family law matter.

1. Open matter **990180** (Peter M James, Divorce Proceedings).
2. Select the "Precedents" tab.
3. Select the *General* category.
4. Double-click on *Cost Agreement Letter to client*.
5. A DataForm will display, requiring entry of additional details to be inserted in the letter. Enter the following:

<i>Date of Signed Cost Agreement:</i>	Select today's date
<i>Requested Amount:</i>	\$600
6. Select **[OK]**
7. A sign-off prompt will display:



8. Select "Yours sincerely" and click [OK].
9. When the merge is complete, the document will display in your word processor. You can now save the document against the matter in Lexis Affinity Library. (Your instructor will advise of the method to use for saving documents.)

Generating a Document for a Client or PhoneBook Record

Documents can also be generated from the Client and PhoneBook windows.

Open the Client or PhoneBook window and then select the "Precedents" tab.

Remember that only those precedents that have been flagged as PhoneBook/Client precedents will be available in these areas of Lexis Affinity Library.



TIP: Generally, when you send a document to your client in relation to a matter, you will do this from the matter window. You would go the Client or PhoneBook window to generate documents that are more general in nature, and not related particularly to a matter.

12.3 Generating Documents for Multiple Records

Documents can be generated for a group of PhoneBook records, clients, matters or matter contacts.

Performing a mail merge for multiple clients, matters or PhoneBook records must begin with selecting the records required (usually with the help of filters).

12.3.1 PhoneBook Mail Merge



Hands On

1. Click on the PhoneBook button on the main toolbar.



2. Clear the current filter settings
3. Select the "Filters" tab.

PhoneBook Selection

PhoneBooks Filters

Standard Extra

Select where criteria Contains Starts with

Search Key

Full Name

Contact

Address

Suburb/Locality

State

Country

DX Location

Note

-Address Type to display
 Street Postal Registered Mailing DX

Relationship:

Select Equal To
 Code Type

State Postcode

Coll. Plan


-Include
 Active PhoneBook
 Active or Permanent Client
 Non-Active Client (no matters)
 Non-Permanent Client
 Inactive PhoneBook

Include Groups Exclude Groups Associated With

Select entries which appear in
 All Categories Any Category

Accountant Tax Seminar
 Agent Valuer
 Associated Party Water Authority
 Association Member
 Auctioneer
 Bank
 Barrister
 Body Corporate
 Building & Construction
 Christmas Card
 Client
 Council
 Court
 Creditor
 Delegate
 Do Not Mail
 Doctor
 Finance Company
 Government Department
 Insurance Agency
 International
 Investigator
 Media
 Mortgagee
 National
 Newsletter
 Other Party
 Our Staff
 Partner acting
 Pharmaceutical
 Seminar
 Small Business
 Solicitor
 Solicitor Firm
 Solicitor acting
 Suppliers

248 Records Filter = Act Pbk's, Act&Perm&Inact&Non-Perm Cts. Displaying Street Address.

4. *Include Groups*: select Finance Company
5. Select the "PhoneBooks" tab to display the results.
6. Click on the arrow beside the  toolbar button and select "Precedent Merge" from the drop-down menu.

PhoneBook Selection

PhoneBooks Filters

Create a Merge file...
Precedent Merge...

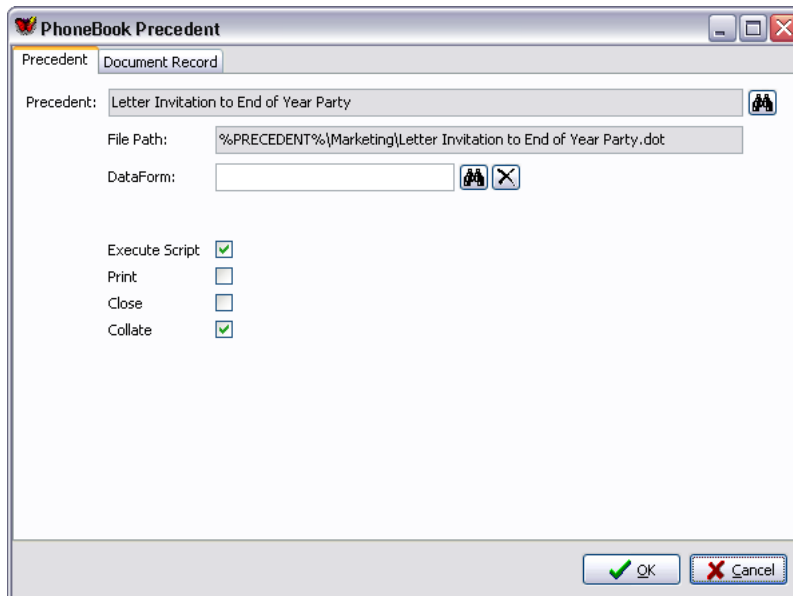
Search Key	Name	Suburb	Work Phone	State	Postcode	Title
CBA - George Street	Commonwealth Bank of Australia Lim	SYDNEY	02 8317 6211	NSW	2000	Mr V
Henderson & Associates	Henderson & Associates	NORTH PARRAMA	02 9663 1234	NSW	2151	Mr J
NAB	National Australia Bank Limited	BRISBANE	07 3670 1234	QLD	4000	Mr J
Streetwise Finance Pty Ltd	Streetwise Finance Pty Ltd	MELBOURNE	03 9688 1234	VIC	3000	Mr J

Search starting with

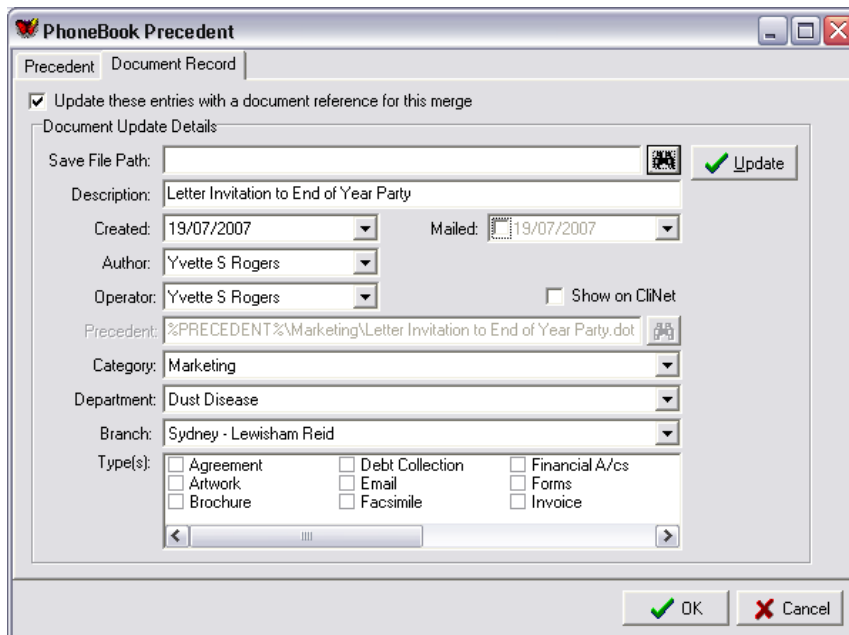
7. The Precedents Explorer window will open, displaying PhoneBook precedents (grouped either by Workflow Area, Precedent Category or DataForm).

8. Display the precedents by Category (if not already selected).
9. Display the **Marketing** precedents by clicking on the [+] symbol beside the name.
10. Select *Letter Invitation to End of Year Party*.

The following dialog box will display:

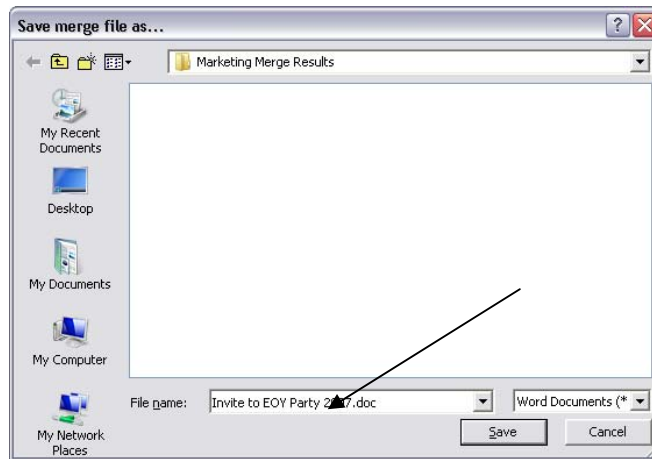


11. Select the “Document Record” tab.



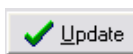
12. *Update these entries with a document reference for this merge*: Check this box

13. *Save File Path:* Click on the binoculars button and browse to a folder where the merge results will be saved. After browsing to the save folder, you must enter a file name.

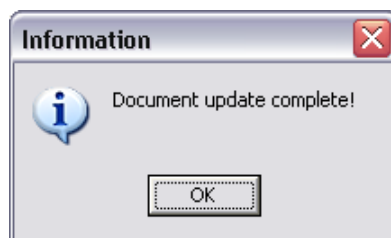


14. *File Name:* enter "Invite to EOY Party 2007".

15. Select 


16. *Type(s):* select Letter and then select 

This will write the document record to each PhoneBook entry. The following prompt will display:



17. Select **[OK]** to close this dialog box.




TIP: If you forget to select the  button to create document records for this merge, you will be prompted to do this when you perform this merge.

18. Click on the **[OK]** button at the bottom of the window to commence the merge.
19. View the merge results in your word processor. Note that the document has been automatically saved using the path and file name entered in the document record.
20. Close the document and return to Lexis Affinity Library.
21. Open one of PhoneBook records in the list.

22. Select the "Documents" tab. You should see an entry for the End-of-Year Party invitation.

NOTE: This procedure can also be performed from the Client and Matter windows.

Merge Options

- Precedent** Displays the name of the precedent document about to be merged.
- File Path** Displays the full precedent name with the full path.
- DataForm** The "DataForm" field shows the DataForm, if any, that is attached to this precedent. If you wish to run a different DataForm, click on the binoculars button and select the DataForm.
You may also click on the  button to remove the attached DataForm.

Save File Path

The "Save File Path" field allows you to enter a path and file name to save the merge results to. This is useful if you are performing a mail merge to multiple contacts.

Execute Script

Some precedents have scripts attached to them. Normally, you would leave this box checked to that any scripts will run. You may uncheck this option if you do not want precedent scripts to run.

- Print** The "Print" field allows you to print the merge results immediately.

- Close** The "Close" field will close the document after merging. This is not recommended unless you have chosen to save and/or print the merge results first.

- Collate** Where multiple records are selected, this option determines how the merge results will be generated. If this option is checked, the merge results will display in one document, by default separated by next page section breaks (this can be overridden by your precedent administrator). If this option is left unchecked, the document for each record will be merged into its own Word document.

Notes

13. Softdocs Precedents

Softdocs precedents can be integrated with Lexis Affinity Library. This means:

1. You will generate your documents (based on a Softdocs precedent) from the matter window in Lexis Affinity.
2. Some data that you enter in Lexis Affinity will be passed across to the HotDocs answer file.
3. Contact details used by Softdocs will be stored in the Affinity PhoneBook.
4. Data entered into the HotDocs answer file can be stored in the Affinity database and is available for searching and conflict checking.

Softdocs libraries are shipped with Affinity dataforms and scripts.

13.1 Matter Creation and Data Entry

When a matter is created (where the matter type has Softdocs precedents attached), you will be presented with a dataform to capture the matter contacts used by the Softdocs precedents.

The following example is based on a NSW property sale.



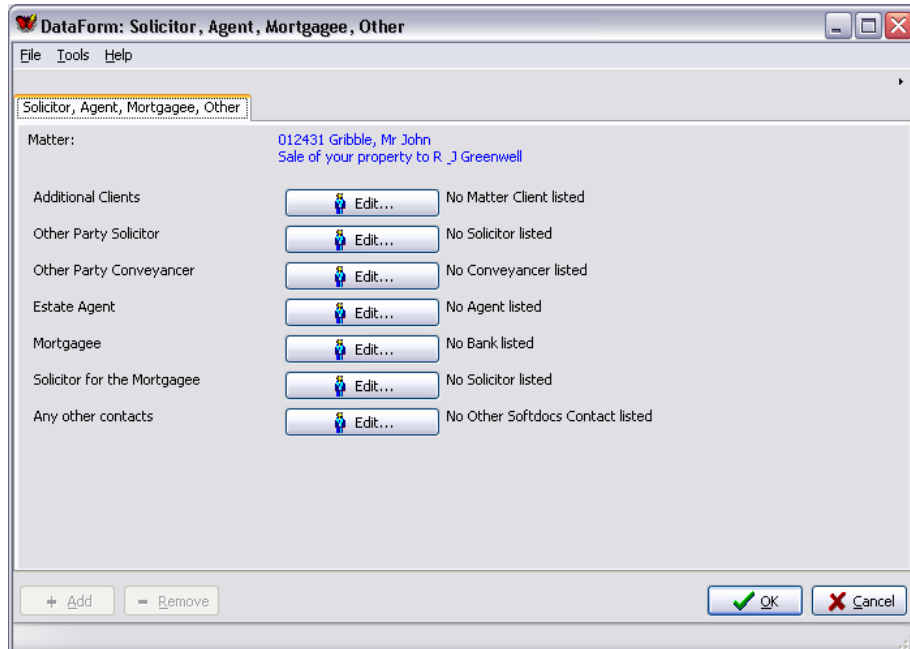
Hands on

1. Open the client **Mr John Gribble**.
2. Create a new matter for this client using the following details:


<i>Author</i>	YSR
<i>Partner</i>	YSR
<i>Controller</i>	MER
<i>Matter Type</i>	CV (<i>Conveyancing Sale</i>)
<i>Short Description</i>	Sale of your property to R & J Greenwell
<i>Long Description</i>	Sale of your property to R & J Greenwell
<i>Your Reference</i>	JG1002
<i>Branch</i>	Sydney – Lewisham Reid
<i>Department</i>	Conveyancing

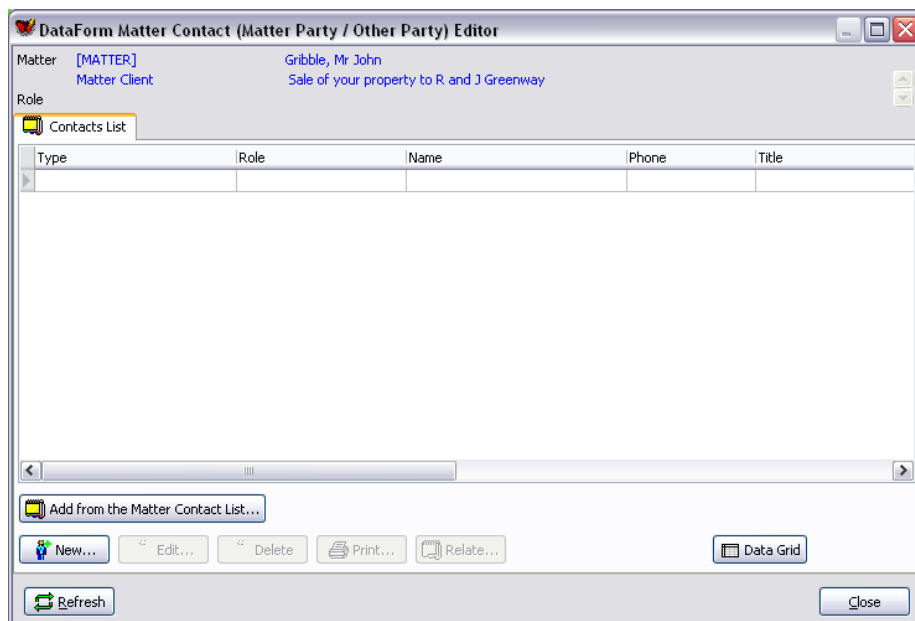
3. Click [OK] to create the matter.


4. The matter number will display. Click [OK] to continue.
5. The following dataform will display:





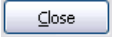

6. You will now enter the contacts for this matter using the buttons on the dataform.

Click on the  button beside Additional Clients. The following dialog box will open:



7. Click on .

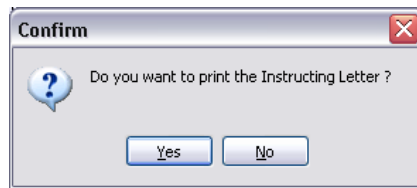
8. Click on the arrow beside the *Role* field and select Vendor from the drop-down list.
9. Click on the  button.
10. Select John M Peters from the PhoneBook list and then click [OK]. The Matter Contact dialog box will now show this selection:

11. Click on .
12. Click on . You will be returned to the DataForm.
13. Now add the following contacts using the  buttons on the DataForm:

<i>Other Party Solicitor</i>	James James & Smythe
<i>Estate Agent</i>	Richardson & Wrench - Parramatta

14. On completion, click [OK] to close and save the dataform.

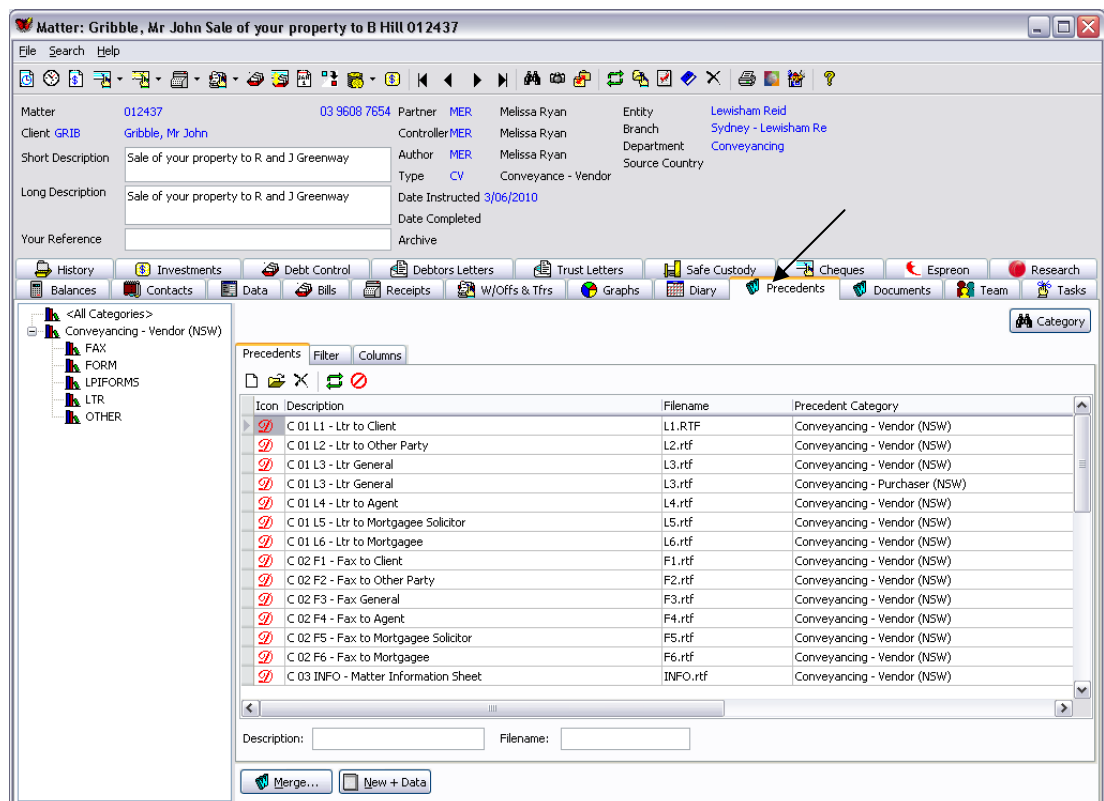
15. At the following prompt, select [No].



16. Matter creation is complete. You can now open the matter and continue work.


13.2 Generating Documents from Softdocs Precedents

The list of Softdocs precedents available for this matter is shown under the "Precedents" tab in the matter window.



Precedents are divided into sub-categories (eg. Fax, Ltr, Form).

- Click on a sub-category to show only the precedents in that category.
- Click in the *Description* box at the bottom of the window and start typing the descriptive name of the precedent, to jump to that precedent.
- Click in the *Filename* box at the bottom of the window and start typing the file name of the precedent, to jump to that precedent.

- When the precedent is selected, click on the  button to launch the HotDocs interview. You can also simply double-click on the precedent.




Hands on


In this exercise you will merge a Softdocs precedent.

- Using the matter created in the previous exercise, select the "Precedents" tab.
- Select the LTR precedent category.
- Double-click on "C 01 L1 - Ltr to Client".

The HotDocs interview will launch for this precedent.

Note that the client details for the two client attached to the matter in Lexis Affinity have been transferred across to the answer file.

- Select John Gribble as the addressee.
- Work through the interview in the usual way, and then click the  button. The document will then display in Microsoft Word.
- On completion, save your document in the usual way.

Users of Lexis Affinity Document Management or Lexis Information Manager will use the  button on the Lexis Document Toolbar.

Adding Matter Contacts








If you need to add more matter contacts to your matter, this should always be done via the dataform. This will ensure the correct type and role are assigned.



Hands on


In this exercise, you will add the mortgagee and the solicitor for the mortgagee as contacts.

1. Using your new matter, select the "Data" tab.
2. Select the dataform labelled "Solicitor, Agent, Mortgagee, Other".

Solicitor, Agent, Mortgagee, Other		
Additional Clients		No Matter Client listed
Other Party Solicitor		No Solicitor listed
Other Party Conveyancer		No Conveyancer listed
Estate Agent		No Agent listed
Mortgagee		No Bank listed
Solicitor for the Mortgagee		No Solicitor listed
Any other contacts		No Other Softdocs Contact listed

3. Using the  buttons, add the following contacts:

<i>Mortgagee</i>	CBA – George Street
<i>Solicitor for the Mortgagee</i>	Salenger Hearne & Biddulph


4. Click the  button to save your changes.

Viewing a List of Contacts

To view a list of matter contacts, select the "Contacts" tab on the matter.

The screenshot shows the LexisNexis software interface for a matter titled "Matter: Gribble, Mr John Sale of your property to B Hill 012437". The "Contacts" tab is selected, displaying a list of contacts. The interface includes a menu bar, a toolbar, and a main content area with a table of contacts.

Type	Seq	Role	Name	Phone	Title	Reference
Agent	1		Richardson & Wrench - Parramatta	02 9635 4788		P3223
Matter BillTo	1		Gribble, Mr John	03 9608 7654		
Matter BillTo Contact	1		Gribble, Mr John	03 9608 7654		
Matter Client	1	Vendor	Gribble, Mr John	03 9608 7654		
Matter Client	2	Vendor	Peters, John M	03 9867 9888		
Solicitor	1	Other Party Solicitor	JJames_James James & Smythe	02 9970 9898	Mr Julian James	33456

Use the  **Open...** button to view and edit the PhoneBook record for the selected contact.

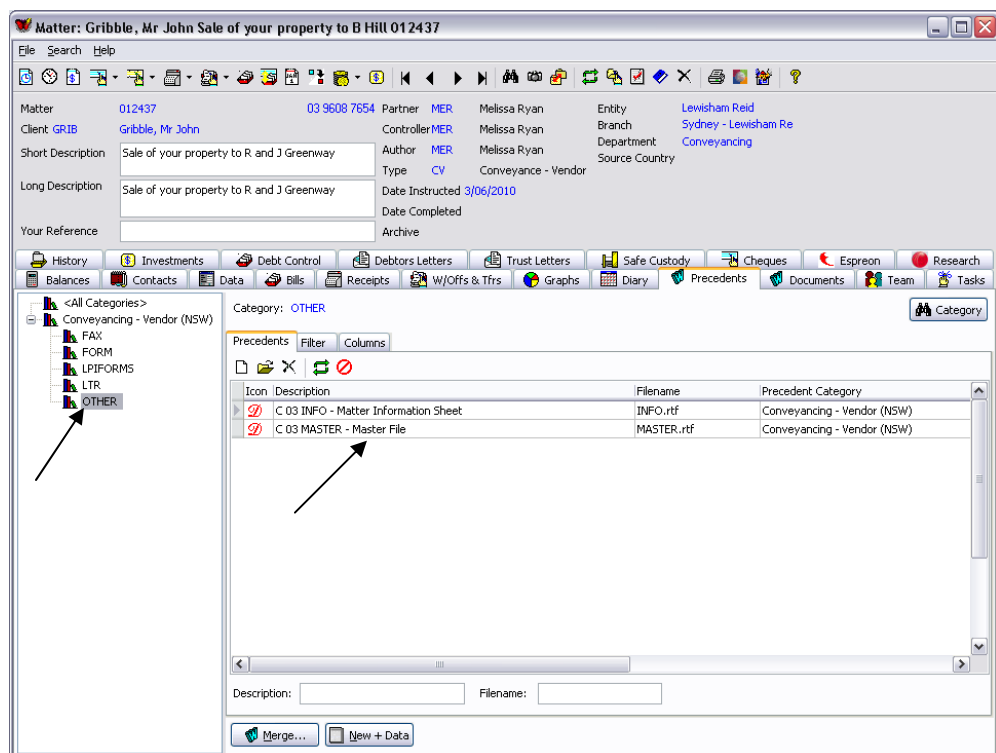
Completing the Master Information File


Once a matter has been opened in Lexis Affinity and you have added all matter contacts required, you can begin generating any Softdocs precedents. However, you may find it useful to begin with the Master Information File, so that as much detail as possible about the matter can be completed.



Hands on

1. Using your new matter, select the "Precedents" tab.
2. Select OTHER from the list of Precedent Categories.




3. Select "C 03 MASTER – Master File" from the precedent list.
4. Click on the  button.

Assembly of the master file will open in HotDocs.

5. On the Matter Details dialog, complete the address fields:

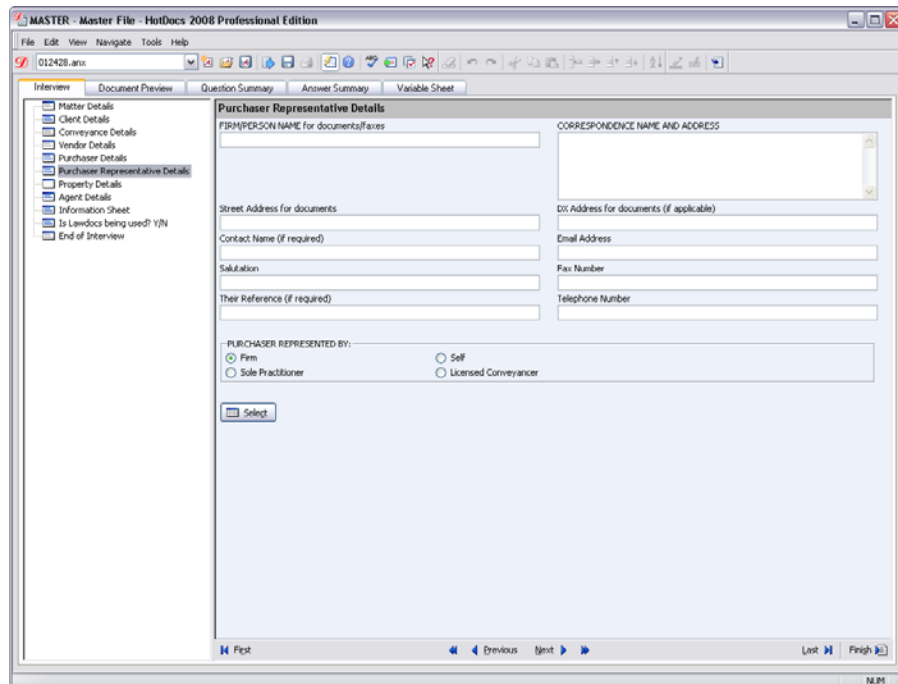
<i>Street No:</i>	15
<i>Street Name:</i>	Wilson Street
<i>Suburb:</i>	Parramatta

6. Click the  button to move through the interview.

You will see that the matter contacts that have been entered in Lexis Affinity have been pushed across to the interview / answer file.

NOTE: If there is an error in the details entered for a contact, this must be corrected via the Lexis Affinity PhoneBook. This will then update the answer file the next time a document is generated.

If a particular matter contact has not been entered in Lexis Affinity, the HotDocs interview dialog will display blank fields, like this:



While you can enter the details here, this is not recommended as they will not be written back to Lexis Affinity. You should return to the Affinity matter, display the dataform and enter and/or select the matter contact.

7. Display the Conveyance Details dialog. Enter the following details:

<i>Property Price:</i>	629,000
<i>Deposit Paid:</i>	62,900
<i>Date Exchanged:::</i>	17 May 2010
<i>Data Settled:</i>	29 June 2010
<i>Is there an Agent?</i>	Yes (This is answered for you because there is an agent on the matter in Lexis Affinity.)
<i>Is there a Mortgagee?</i>	Yes (This is answered for you because there is a mortgagee on the matter in Lexis Affinity.)
<i>Is the Vendor the Reg'd Proprietor?</i>	Select Yes
<i>Is the property in a new subdivision?</i>	Select No

The screenshot shows the 'Conveyance Details' dialog box in the MASTER - Master File - HotDocs 2009 Player Edition software. The dialog box contains the following fields and options:


- CONVEYANCE TYPE: Sale Purchase
- PROPERTY PRICE: \$ 629,000.00
- DEPOSIT PAID: \$ 62,900.00
- DATE EXCHANGED: 17 May 2010
- DATE SETTLED: 30 Jun 2010
- IS THERE AN AGENT?: Yes No
- IS THERE A MORTGAGEE?: Yes No
- IS THE VENDOR THE REGD PROPRIETOR?: Yes No
- IS THE PROPERTY IN A NEW SUBDIVISION?: Yes No

The 'Next' button is highlighted in the bottom right corner of the dialog box.

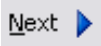
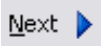
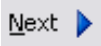
8. Click  to display the Vendor Details dialog.

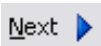
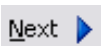
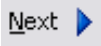
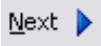

Enter the vendor details as follows.

<i>How many vendors?</i>	2
<i>Tenancy Details</i>	Tenants in Common equal
<i>VENDOR 1 – Name</i>	John Michael Gribble
<i>Vendor 1 – Address</i>	33 Riverview Drive, Abbotsford
<i>VENDOR 2 – Name</i>	John Matthew Peters
<i>Vendor 2 - Address</i>	140 Albert Road, East Melbourne

9. Click  to display the Purchaser Details dialog and enter the details as follows:

<i>How many purchasers?</i>	2
<i>Tenancy Details</i>	Joint Tenants
<i>PURCHASER 1 – Name</i>	Mr Robert Greenway
<i>Purchaser 1 – Address</i>	151 Hawkes Street, Parramatta
<i>PURCHASER 2 – Name</i>	Mrs Jane Greenway
<i>Purchaser 2 - Address</i>	Leave blank

10. Click . The purchaser representative details will display. Note that the other party solicitor selected in Lexis Affinity will display here.
11. Click . The property details will not be entered at this stage.
12. Click . The details of the agent selected in Lexis Affinity will display.

NOTE: If you have not entered an agent in Lexis Affinity, the question "Is there an Agent?" will be set to "No" in the HotDocs interview and you will not see an Agent Details dialog.
13. Click . Leave the default answers as they are on the Mortgagee Details dialog.
14. Click .to display First Mortgagee Details. The bank selected in Lexis Affinity will display.
15. Click . to display the First Mortgagee Solicitor details. The solicitor details have been passed from Lexis Affinity.
16. Click . Answer Yes to print an Information Sheet.
17. Click the  button to send the document to Microsoft Word.

13.3 Including HotDocs Data in Conflict Checking

Data keyed into a HotDocs answer file can be included in the Conflict Checker report only if the data has been written back to the Lexis Affinity database.



IMPORTANT

The Lexis Affinity Conflict Checker does not check the HotDocs answer files. It will only search the Lexis Affinity database.

If you are not sure what data is being written back to Lexis Affinity, please speak with your Lexis Affinity Consultant or your Softdocs Consultant, or telephone the Helpline.

To include HotDocs data in the Conflict Checker report, you must tick the HotDocs checkbox in the Conflict Checker dialog box:

Conflict of Interest Checker - New

File Help

Conflict Checker

Template: NONE No template assigned

Description: [Empty text box]

Entity: LR - Lewisham Reid

Branch: [Empty dropdown]

Include in Search:

PhoneBook records	<input checked="" type="checkbox"/>	No of Months Audit Trail Reporting	[Empty] 7/06/2010
Client records	<input checked="" type="checkbox"/>	Context of Search	[Empty] [Icon] [X]
Matter records	<input checked="" type="checkbox"/>	Override Matter Team Security	<input checked="" type="checkbox"/>
DataForms	<input checked="" type="checkbox"/>	Do Case Sensitive Search	<input type="checkbox"/>
Archive records	<input checked="" type="checkbox"/>		
Audit Trail	<input type="checkbox"/>		
HotDocs	<input checked="" type="checkbox"/>		

Search Criteria:

Search Words / Phrase [Empty] Whole Word?

And Or [Empty] Whole Word?

And Or [Empty] Whole Word?

Keep Open?

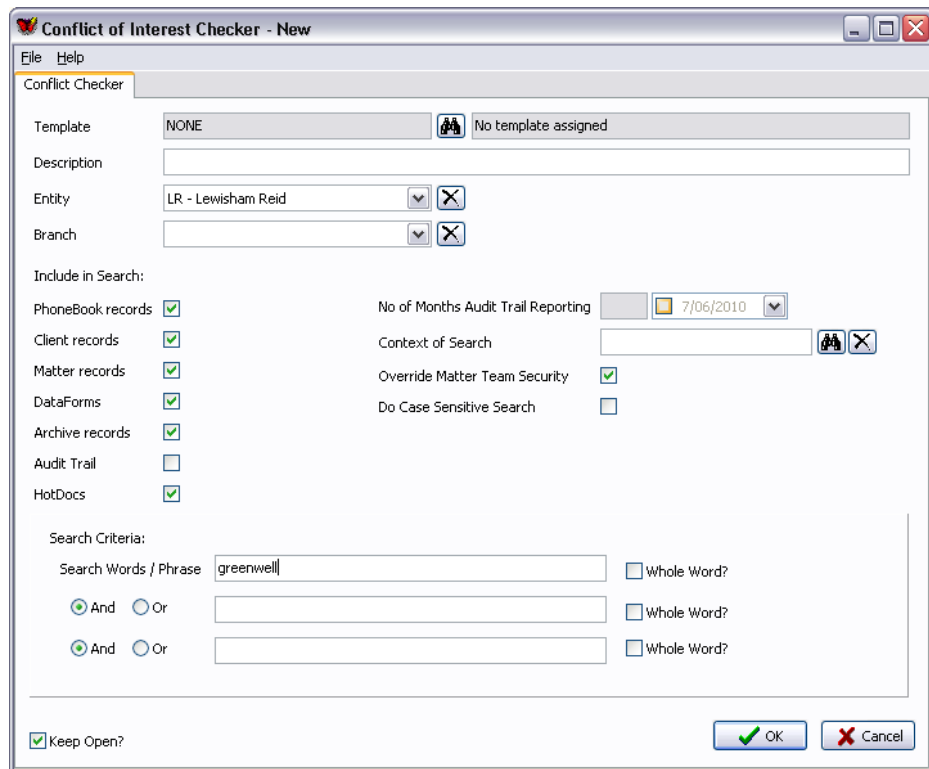
OK Cancel



Hands on

In this exercise, you will use the Conflict Checker to find matters containing the name "Greenway".

1. In Lexis Affinity, select Database | Conflict of Interest Checker.
2. *Entity*: select Lewisham Reid.
3. *Branch*: leave blank
4. Make sure the HotDocs checkbox is ticked.
5. *Search Words / Phrase*: enter "greenway" (not in quotes).



The screenshot shows the 'Conflict of Interest Checker - New' dialog box. The 'Entity' dropdown is set to 'LR - Lewisham Reid'. The 'Search Words / Phrase' field contains 'greenwell'. The 'HotDocs' checkbox is checked. The 'Keep Open?' checkbox is also checked. The 'OK' button is highlighted.

6. Click on  to process the report.

The report will display on screen, showing the search string in bold (see example on next page). You will see that this string has been located in the HotDocs data for your matter.

Conflict Checker		
Entity: LR Lewisham Reid		
Branch: SYD Sydney - Lewisham Reid		
Search Word / Phrase: greenway		
Search Selection Criteria: Archive, Client, Matter, PhoneBook, Include DataForm,		
<hr/>		
Client (0 client found)		
Client Note (0 client note found)		
Matter (1 matter found)		
GRIB	MER	Gribble, Mr John
Gribble, Mr John		
012430	YSR / MER / YSR / 31/JAN/11 / Sale to R & J Greenway / CV	
	Sale to R & J Greenway	
Total of 1 matter		
Matter Contact (0 matter contact found)		
Matter DataForm (0 matter dataform found)		
Matter Debtor (0 matter deYSR / MER / YSR / 31/JAN/11 / Sale to R & J Greenway / CV		
Matter HotDocs (1 matter HotDocs field found)		
012430		
	Sale to R & J Greenway	
F24		Mr Robert Greenway
F26		Mrs Jane Greenway
Matter Parties		Mr Robert Greenway [Purchaser 1] Mrs Jane Greenway [Purchaser 2] John Matthew Peters [Vendor 2] 15 Wilson Street, Parramatta [Property Address]

The above report shows that the string “greenway” has been found in the matter description for matter 012430 and also in fields F24, F26 and Matter Parties in the HotDocs data for matter 012430.

Notes

14. Document Management

The Document Management functions of Lexis Affinity Library include custom toolbars which are loaded into Microsoft Word and Microsoft Outlook. When Word documents and Outlook emails are saved, the details are recorded in the Lexis Affinity database. Document details can be displayed in the PhoneBook, Client and Matter windows.

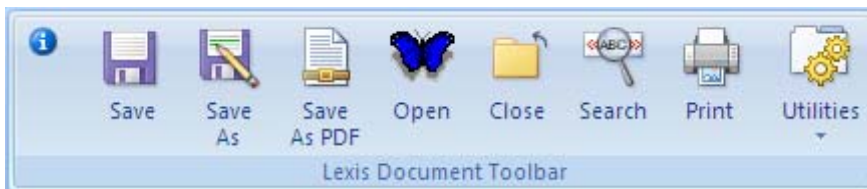
14.1 Lexis Document Toolbar in Word

The Lexis Document Toolbar will display in Word as shown below:

Word 2003 or earlier



Word 2007 or greater (found in the LexisNexis ribbon)



Lexis Document Toolbar Functions in Word

SAVE	Save the current document. If the document has not yet been saved, this works the same as the "Save As" button. If specified, this process will also place a footer on the document (showing the file name).
SAVE AS	Save the current document with a new file name (eg. create a copy) or to a different matter.
SAVE AS PDF	Save the current document as a PDF file (note: this will also save the current Word document to Affinity if it has not been saved)
OPEN	Open (or switch to) Lexis Affinity Library.
CLOSE	Close the active document.
SEARCH	Search for stop codes in your documents.
PRINT	Send documents to print based on user selections.
UTILITIES	Drop down a menu of <i>emPower</i> and other document utilities.

NOTE: The toolbar is customised at the time of installation to suit your firm's requirements. Some of the buttons described above may not be present on your toolbar.

14.2 Saving Documents

Click **Save** or **Save As** to save the document to Lexis Affinity.

The following steps are performed:

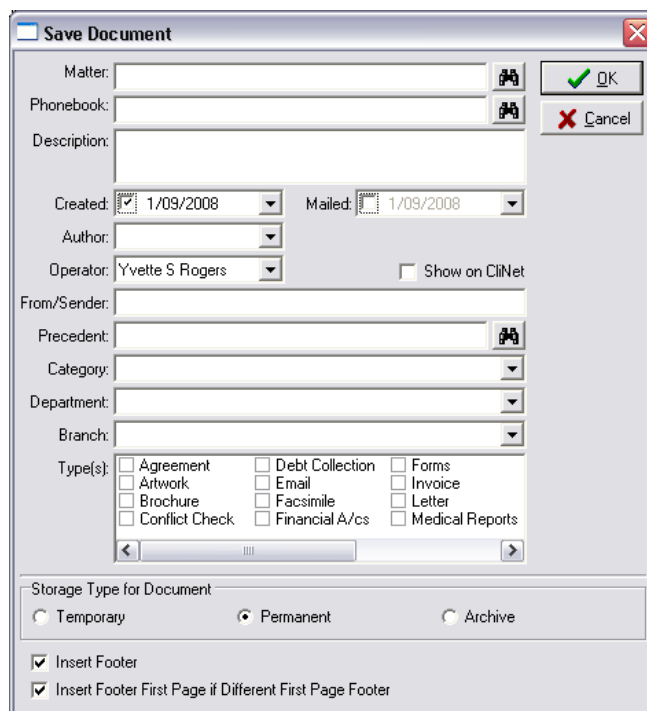
1. Assign a file name to the document;
2. Save the document to a pre-defined folder location on your network;
3. Place the file name (and path if required) into the footer of the document (this feature may be disabled if not required);
4. Write information about the document and its location into the Lexis Affinity Library database.



PROCEDURE

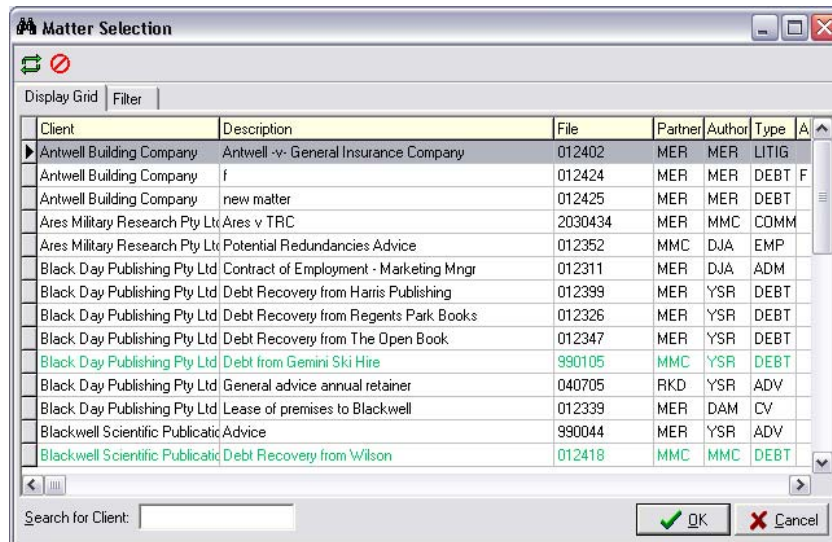
To save a Word document and record the details in Lexis Affinity Library:

1. Click on the **Save** button on the Lexis Document Toolbar. The “Save Document” dialog box will display:



2. Type the matter number / file ID into the Matter No box. If the document is not matter-related, you can leave the matter number blank if you wish only to record the document against a PhoneBook/Client.

If you do not know the matter number, click on the binoculars button. The Matter Selection window will open. This window allows you to search for a matter by first searching for the client name, and then selecting the correct matter.



- In the *Search for Client* box, begin typing the client name until the required client is shown in the window.
- Double-click on the matter number required.

The "Save Document" dialog box will re-display with the matter number inserted. Other fields associated with the selected matter will be completed automatically (eg. PhoneBook; author; department and branch). The operator and date are automatically inserted.

NOTE: If the document has been generated from Lexis Affinity Library, the matter number will be inserted automatically.

- Click into the *Description* box and type in a meaningful description for the document (eg. Letter to client enclosing Costs Agreement). You may find this field has been automatically populated – this is controlled by your system administrator.



TIP: The details entered into the **Description** box can be used to search for a document in Affinity. It is important to be consistent across the firm (eg. always use say, "Letter" rather than variations such as "Ltr").

- Complete any other details required such as Category and Type(s).
- Click **[OK]**.

NOTE: Some fields in the "Save Document" dialog box may be compulsory. That is, you must complete these fields in order to save the document. Your System Administrator will determine which fields are compulsory.

Document Footer

The file name will print in the footer, unless you choose to omit the footer.



TIP: Try to remember to save the document before printing, otherwise the file name footer will not display on the hard copy.

Save As vs Save

When modifying an existing document, you can either save the changes "over" the previous document, or you can save a different version of the document under a different file name.


- To save "over" the previous document, simply press the [Save] button after making the edits.
- To save another version of a document under a different file name, use the [Save As] button. This will assign a new file name to the document and you will be able to enter a new description.



Versions

You may also use the **Versions** feature available in Microsoft Word (version 2003 and earlier). To use this, ask your System Administrator to enable the "Versions" feature in the Document Management setup.



Hands on


1. Create a new document in Microsoft Word.
2. Type your firm name and address into the document.
3. Click on the  button on the Lexis Document Toolbar.
4. You do not know the matter number so click on the binoculars beside the matter box.
5. Select a matter to save the document against.
6. Click into the *Description* box and type the following text as the description:
Firm Name and Address
7. Click [OK].
8. Select Word's Print Preview function to view the document footer.

9. Close the Preview screen.
10. Move the cursor to the end of the document and add the firm's phone number.
11. Click on the  button on the Lexis Document Toolbar.
12. Edit the document and change the firm name to firm's service company name.
13. Click on the  button on the Lexis Document Toolbar.
14. Enter the *Description* as: Service Company Details
15. Click **[OK]**.
16. Preview the document and note the new footer details.
17. Close the document.



TIP: If you have versioning enable and you want to save the document without creating a new version simply press the native Word Save button or press CTRL-S. Note that the document must have been saved in Affinity initially.

14.3 Save As PDF

The  button is used to save the current document in PDF format. The document must be saved as a Word document first. If you have not saved the document, this will be done automatically before the PDF file is created.

14.4 Display / Open Documents

Once a document has been saved it will be listed in various windows within Lexis Affinity Library. Documents and other types of files may be opened directly from these windows.

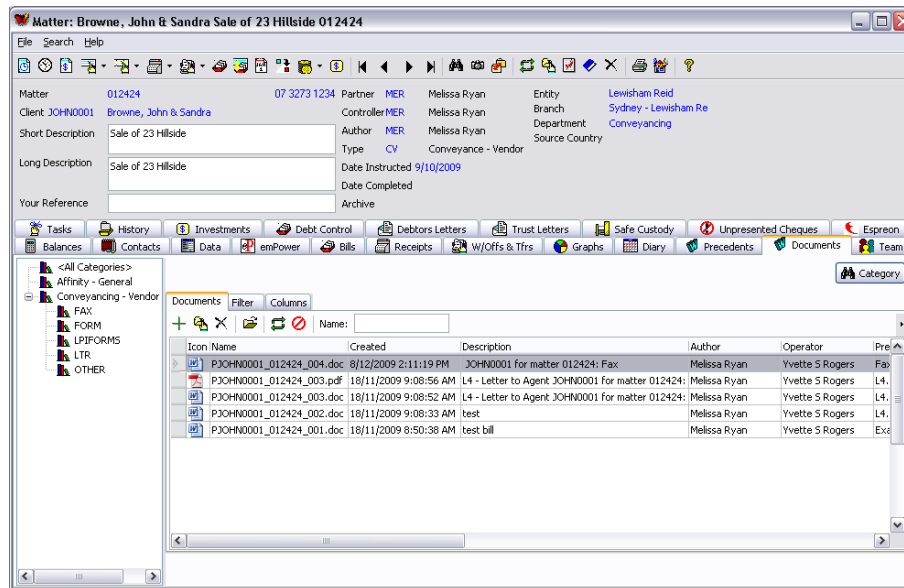


TIP: When using Lexis Affinity Library Document Management, you will search for documents and open documents **from inside Lexis Affinity Library**. It is recommended that you **do not** try to find and open files using Word's "Open" function, or Windows Explorer, as this will take much longer.

Documents are displayed and opened from the "Documents" tab in the following windows:

1. Matter window.
2. Client window.
3. PhoneBook window.
4. Document Management window (in the Case Management group).

Example: Matter Window



The document table has a number of columns. Not all columns are visible at one time. Use the vertical and horizontal scroll bars to view additional columns and entries further down in the list

Open Document

If you know the name of the document you are looking for, you can jump to it quickly by typing the first part of the name in the "Name" box at the top of the list. Otherwise, scroll through the list to locate the document, or use the "Filter" window to narrow down the list of documents displayed. See page 283 for more information on how to use filters.

To open a document from the list:



Double-click on the document entry OR



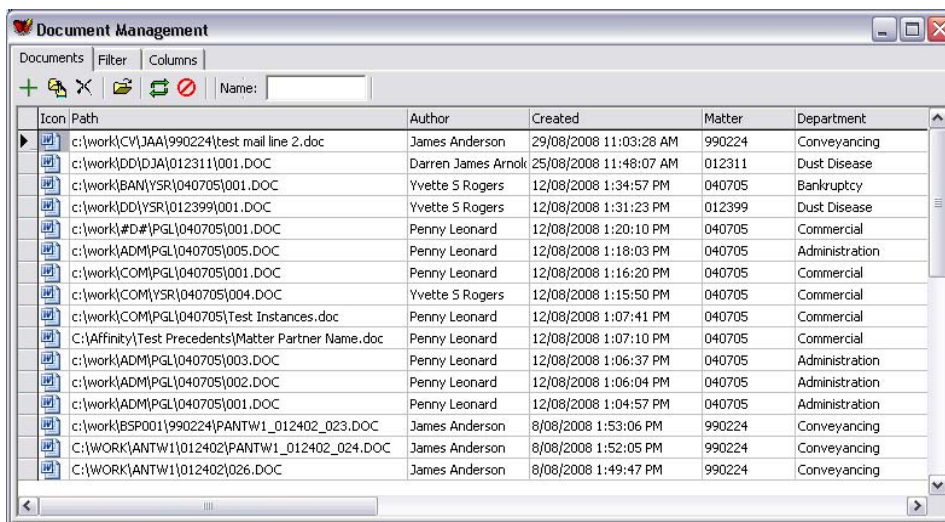
Highlight the document entry and click on the "Open" icon on the toolbar OR



Right-click on the document entry and select "Open Document" from the drop-down menu.

14.5 The Document Management Window

Open the **Document Management** window to all list all documents / files that have been generated and saved, across the firm.




Icon	Path	Author	Created	Matter	Department
	c:\work\CV\JAA\990224\test mail line 2.doc	James Anderson	29/08/2008 11:03:28 AM	990224	Conveyancing
	c:\work\DD\DD\012311\001.DOC	Darren James Arnok	25/08/2008 11:48:07 AM	012311	Dust Disease
	c:\work\BAM\YSR\040705\001.DOC	Yvette 5 Rogers	12/08/2008 1:34:57 PM	040705	Bankruptcy
	c:\work\DD\YSR\012399\001.DOC	Yvette 5 Rogers	12/08/2008 1:31:23 PM	012399	Dust Disease
	c:\work\#D#\PGL\040705\001.DOC	Penny Leonard	12/08/2008 1:20:10 PM	040705	Commercial
	c:\work\ADM\PGL\040705\005.DOC	Penny Leonard	12/08/2008 1:18:03 PM	040705	Administration
	c:\work\DD\YSR\040705\001.DOC	Penny Leonard	12/08/2008 1:16:20 PM	040705	Commercial
	c:\work\COM\YSR\040705\004.DOC	Yvette 5 Rogers	12/08/2008 1:15:50 PM	040705	Commercial
	c:\work\COM\PGL\040705\Test Instances.doc	Penny Leonard	12/08/2008 1:07:41 PM	040705	Commercial
	C:\Affinity\Test Precedents\Matter Partner Name.doc	Penny Leonard	12/08/2008 1:07:10 PM	040705	Commercial
	c:\work\ADM\PGL\040705\003.DOC	Penny Leonard	12/08/2008 1:06:37 PM	040705	Administration
	c:\work\ADM\PGL\040705\002.DOC	Penny Leonard	12/08/2008 1:06:04 PM	040705	Administration
	c:\work\ADM\PGL\040705\001.DOC	Penny Leonard	12/08/2008 1:04:57 PM	040705	Administration
	c:\work\BSP001\990224\PANTW1_012402_023.DOC	James Anderson	8/08/2008 1:53:06 PM	990224	Conveyancing
	C:\WORK\ANTW1\012402\PANTW1_012402_024.DOC	James Anderson	8/08/2008 1:52:05 PM	990224	Conveyancing
	C:\WORK\ANTW1\012402\026.DOC	James Anderson	8/08/2008 1:49:47 PM	990224	Conveyancing

1. Click on the **Clear All** button. 

It is very important to click on the Clear All button when using the Document Management window if you wish to see all files. This window has a pre-defined filter, showing only the files created by you during the last month.



Hands on

1. In Lexis Affinity Library, open the matter you saved your documents against.
2. Click on the "Documents" tab.
3. Open the file containing the service company details.
4. Close the file.
5. Open the PhoneBook entry belonging to the matter.
6. Locate and open the document containing the firm details.
7. Close the document.
8. Open the Document Management window in Lexis Affinity Library.
9. Scroll through the Documents list.
10. Click on the **[Clear All]** button. 
11. Scroll through the Documents list again. You should notice more files.

14.6 Tabs and Toolbar



Tabs

Documents	Displays the document list
Filters	Filters the document list by certain criteria
Columns	Customises the column layout

Toolbar



Add single or multiple file entries to the database



Edit the details of the selected document entry



Delete one or more file entries from the database



Open the selected document / file



Refresh the document list



Clear the current filter and refresh the document list

Name: In the "Name" box, starting typing the name of the file to jump to the first file in the list beginning with that string of characters.

Exclude Matter Documents:

If you are viewing documents in the Client or PhoneBook windows, you can tick this box to exclude matter-related documents from the list.

Refresh the Document List



You may need to click on the **Refresh** button on the toolbar from time to time to refresh the list. For example, if a document has been saved against a matter while the document list for that matter was open in Affinity, the list may need to be refreshed before the document will display.

Clearing the Filter

A filter is used in Lexis Affinity Library to narrow down the selection or results that are displayed. Filters are used to narrow down document lists to assist in the fast retrieval of the document required.



You may need to click on the **Clear All** button on the toolbar from time to time, to clear the current filter and refresh the list. If a filter has been applied to the document list, but you now wish to view all files in the list, click on the **Clear All** button. This clears the filter selections and refreshes the list.



TIP: If you cannot find a document in the list, it is a good idea to click on the **Cancel All** button and then check again. Remember that the **Refresh** button does not clear the filter.

14.7 Column Layout

Column layout may be customised including selection of columns to display, the size of the columns, and the order of the columns. You may also sort the entries by clicking on the column headings.

14.7.1 Column Headings

Icon	The icon associated with the type of file
Path	Full path and file name
Name	File name only
Created	Date the file was created
Mailed	Date the document was mailed
Matter	The matter number
Description	Document description (as entered by the user)
Author	The author assigned to the matter in Affinity
Operator	The Affinity operator who created the document (as per Affinity login).
PhoneBook	The PhoneBook entry (and therefore the client) associated with this matter.

From/Sender*

Sender of correspondence (used where incoming files such as emails are attached to a matter)

Precedent Name of the Affinity precedent (if any) used to generate this document

Category* Category or area of practice that this file belongs to (eg. Debt Recovery, Conveyancing Purchaser, Litigation)

Show on CliNet*

Nominate whether this document is to be available on CliNet

Department Department assigned on the matter

Branch Branch assigned on the matter

Deleted By* Name of person who deleted the entry

Deleted Date*

Date entry was deleted

- * Contents of columns marked with an asterisk are *blank* unless a user edits the entry and completes these details or, in the case of the "Deleted By" and "Deleted Date" fields, unless a user deletes the entry.

14.7.2 Modifying the Column Layout

Column layout is modified by:

- Using the mouse to drag and drop columns *and*
- Using the **Columns** tab

Using the Mouse

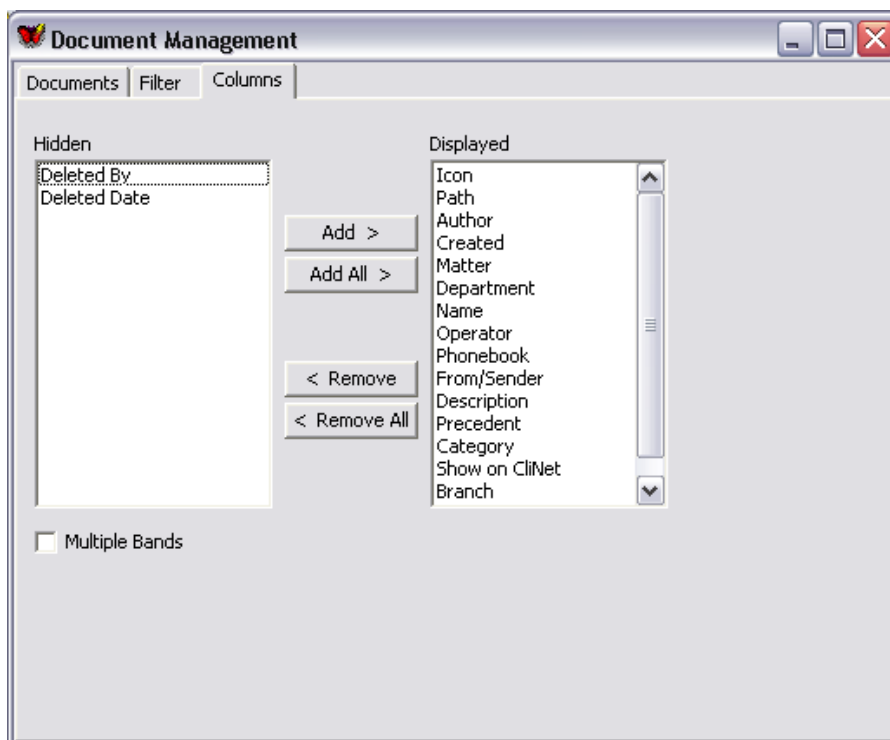
Use the mouse to adjust the column layout in the following ways:

- Grab the edge of the column heading and drag to the left or right to resize a column
- Point to a column heading and hold down the left mouse button. Drag the entire column to the left or right to reposition the column.

Using the "Columns" Tab

The **Columns** tab can be used to select the columns to be displayed; to re-order the columns; and to change to a multi-line display mode.

1. Click on the **Columns** tab to display the Columns window.

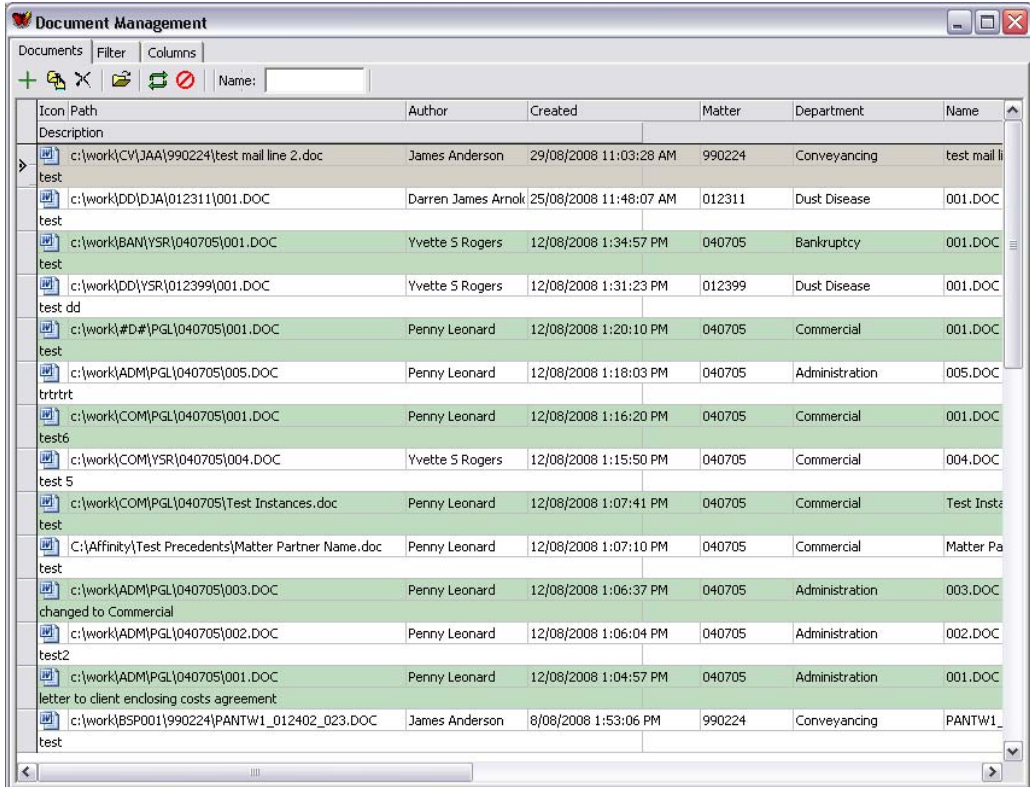


2. The column headings shown in the "Hidden" box do not display at all in the Documents table.
3. The column headings shown in the "Displayed" box will display in the Documents table, in the order they appear in the list.
4. Add more columns to the display by clicking on the column name in the "Hidden" box and then clicking on the **Add >** button. The column name will appear at the bottom of the "Displayed" box but can be repositioned by dragging and dropping the column name higher up in the list.
5. Remove columns from the display by clicking on the column name in the "Displayed" box and then clicking on the **< Remove** button.
6. Reposition the columns by dragging and dropping the column names up or down in the "Displayed" list.
7. Click on the **Documents** tab to view the changed layout.

Multiple Bands



Click on the “Multiple Bands” check box for a multi-line display of document entries as shown below.



Icon	Path	Author	Created	Matter	Department	Name
	c:\work\CV\JAA\990224\test mail line 2.doc	James Anderson	29/08/2008 11:03:28 AM	990224	Conveyancing	test mail li
	c:\work\DD\DDA\012311\001.DOC	Darren James Arnok	25/08/2008 11:48:07 AM	012311	Dust Disease	001.DOC
	c:\work\BAN\YSR\040705\001.DOC	Yvette S Rogers	12/08/2008 1:34:57 PM	040705	Bankruptcy	001.DOC
	c:\work\DD\YSR\012399\001.DOC	Yvette S Rogers	12/08/2008 1:31:23 PM	012399	Dust Disease	001.DOC
	c:\work\#D#\PGL\040705\001.DOC	Penny Leonard	12/08/2008 1:20:10 PM	040705	Commercial	001.DOC
	c:\work\ADM\PGL\040705\005.DOC	Penny Leonard	12/08/2008 1:18:03 PM	040705	Administration	005.DOC
	c:\work\COM\PGL\040705\001.DOC	Penny Leonard	12/08/2008 1:16:20 PM	040705	Commercial	001.DOC
	c:\work\COM\YSR\040705\004.DOC	Yvette S Rogers	12/08/2008 1:15:50 PM	040705	Commercial	004.DOC
	c:\work\COM\PGL\040705\Test Instances.doc	Penny Leonard	12/08/2008 1:07:41 PM	040705	Commercial	Test Inst
	C:\Affinity\Test Precedents\Matter Partner Name.doc	Penny Leonard	12/08/2008 1:07:10 PM	040705	Commercial	Matter Pa
	c:\work\ADM\PGL\040705\003.DOC	Penny Leonard	12/08/2008 1:06:37 PM	040705	Administration	003.DOC
	c:\work\ADM\PGL\040705\002.DOC	Penny Leonard	12/08/2008 1:06:04 PM	040705	Administration	002.DOC
	c:\work\ADM\PGL\040705\001.DOC	Penny Leonard	12/08/2008 1:04:57 PM	040705	Administration	001.DOC
	c:\work\BSP001\990224\PANTW1_012402_023.DOC	James Anderson	8/08/2008 1:53:06 PM	990224	Conveyancing	PANTW1

The Multiple Bands display shows the description on the second line for each entry.



Hands on

The aim of this exercise is for you to become familiar with using the Column Layout in the Documents list.

1. Open your matter and display the generated documents.
2. Click on the "Columns" tab.
3. Remove the following columns from the display list:

Path

CliNet

Category

Department

Operator

4. Place *Operator* back on the display list.
5. Order the columns to be displayed as follows:
Icon
Name
Description
Operator
Author
(order the remaining columns as you wish)
6. Click on the "Documents" tab to review the results.
7. Resize the *Description* column to make it smaller.
8. Reverse the order of *Operator* and *Author* (use the drag and drop method).
9. Close the matter window.
10. Open your PhoneBook entry and click on the "Documents" tab to view the document list.
11. Open the Document Management window and view the document list.
12. Sort the list by date in ascending order.
13. Sort the list by matter number.
14. Sort the list by author.

14.8 Add, Modify and Delete Entries

Add Entries




Use the **[Add a Document]** button to add a reference or link to documents or other file types that are related to a matter or PhoneBook entry (client).

Files you may wish to add include:

- A Word document that was not saved using Document Management
- A document generated by another word processor (eg. WordPerfect)
- A scanned image that has been saved onto your system
- A spreadsheet that has been saved onto your system

Add a Single Document Entry

To add a single document:

1. Open the Documents windows (from either the Matter, PhoneBook or DM windows)
2. Click on the  button. The following dialog box will display:



3. *Path*: click on the binoculars button to browse to the file.

When you have located the file, double-click on the file name.

4. *Matter:* insert the matter number (may be left blank if the file is not associated with any particular matter).



TIP: If you enter the **Matter No** first, the **Author**, **PhoneBook**, **Branch** and **Department** fields will be automatically completed for you.

5. *Description:* enter a meaningful description for the file.
6. *Date:* defaults to today but can be altered.
7. *Mailed:* tick this box to record the date the document was mailed (if required).
8. *To Folder Structure:* select to move or copy the file to the Document Management folder structure used in Word or leave it where it is. (This feature is only available is activated by your System Administrator.)



TIP: If you select the "Neither" option then the document will be indexed within Affinity in its current location. This option is not recommended, especially if the document resides in a local drive or user's home directory. In this scenario only the user who registers the document within Affinity will be able to open the document.

9. *CliNet:* select if you have CliNet and would like this file to be available to CliNet.
10. *Operator:* defaults to the user logged into Lexis Affinity Library.
11. *Sender:* used to enter the name of the sender of an incoming document or email.
12. *Precedent:* insert the name of the precedent document used to generate this file.
13. *Category:* nominate a document category or practice area (eg. Litigation) for this file.
14. *Department:* defaults to the matter department. This can be modified.
15. *Branch:* defaults to the matter branch. This can be modified.

16. *Type(s)*: allows you to flag this file as a particular type (eg. letter, spreadsheet, image). You may select more than one type.




TIP: Document Types are set up in another area of Lexis Affinity Library. Please see your System Administrator if you need to add more types.

17. Once all required fields are completed, click on the **[OK]** button to add the file to the list.

Add Multiple Entries

The procedure for adding multiple entries is the same as that for adding single entries. Note that when adding multiple entries, the files must be assigned to same PhoneBook entry and/or matter number. Likewise, all files selected will be assigned against the same author, operator, category, department etc. It is possible to modify an entry to say, change the author, after the files have been added to the list.

NOTE: When adding multiple files, the files must all reside in the same folder.

1. Click on the  button.
2. *Path*: click on the binoculars button to browse to the files.
3. Single-click to select the first file to be added. To select further files, hold down the **<Ctrl>** key on the keyboard while selecting each entry with the mouse.



TIP: To select an entire folder of files, press **<Ctrl> A** on the keyboard.

4. Complete the other field details as required.

NOTE: The *Description* field will show as [**<File Name>**] when multiple entries are added. This means the name of the file will be inserted as the description. This can be changed but whatever you change it to will be inserted for all files you are adding in this procedure.

5. Click on the **[OK]** button.
6. You will see that each file has been added as an entry in the list.


Modify Entries

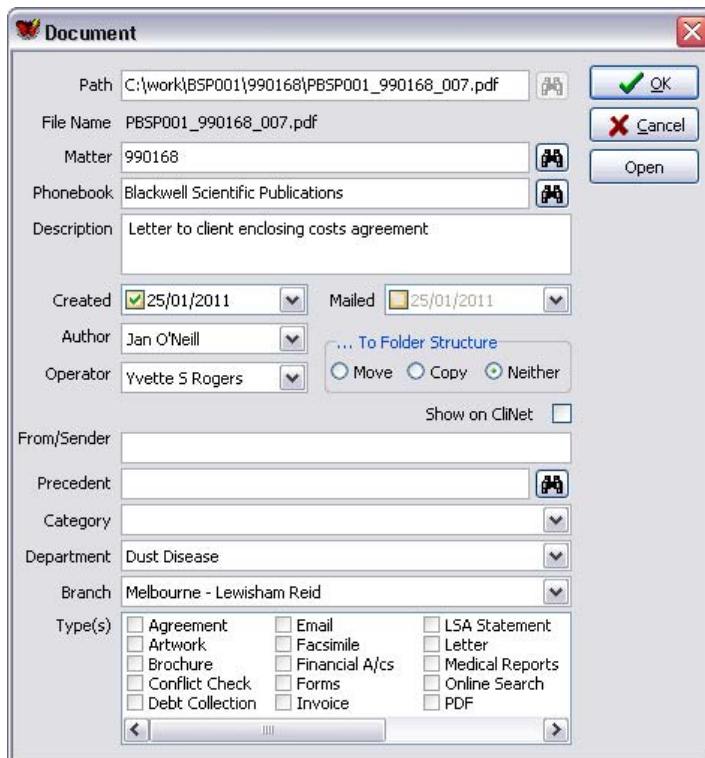
Once a file entry has been added to the list, the details of the entry may be modified. There are two methods:

1. Use the Edit function to open a dialog box that allows editing of the documents details.
2. Unlock the display grid to allow direct editing within each column.

Edit Via Dialog Box



1. Locate and select the document entry to be edited
2. Click on the  button OR right-click on the entry and select "Edit" from the drop-down menu. The following dialog box will display:



The image shows a 'Document' dialog box with the following fields and options:

- Path:** C:\work\BSP001\990168\PBSP001_990168_007.pdf
- File Name:** PBSP001_990168_007.pdf
- Matter:** 990168
- Phonebook:** Blackwell Scientific Publications
- Description:** Letter to client enclosing costs agreement
- Created:** 25/01/2011
- Mailed:** 25/01/2011
- Author:** Jan O'Neill
- Operator:** Yvette S Rogers
- ... To Folder Structure:** Move, Copy, Neither (Neither is selected)
- Show on CliNet:**
- From/Sender:** [Empty field]
- Precedent:** [Empty field]
- Category:** [Empty dropdown]
- Department:** Dust Disease
- Branch:** Melbourne - Lewisham Reid
- Type(s):** Agreement, Artwork, Brochure, Conflict Check, Debt Collection, Email, Facsimile, Financial A/cs, Forms, Invoice, LSA Statement, Letter, Medical Reports, Online Search, PDF

3. Modify the details as required. Note that the path and file name cannot be changed.
4. Click on the **[OK]** button.

Direct Editing from the *Documents* Grid

File entries may be modified directly from the Documents grid. The grid is locked by default to avoid accidental changes. To unlock the grid for editing:


1. Right-click anywhere on the Documents list (grid). You will see that the *Lock Grid* item is ticked on by default.
2. Select the *Lock Grid* item to de-select it.
3. The document entries may now be edited by tabbing to the row and column required and making the changes.

For example:

- To change the *Description*:

Click on the description for a file to position the cursor inside the description box. You may then type in a new description, or modify an existing description.

- To change the *Author*:

Click on the author name on a file. A drop-down arrow will display. 

Click on the arrow and select a different author from the list.

- To change the *Matter*:

Click on the Matter field. A graphic will display at the end of the field. 

This graphic indicates that, if selected, a window will open. Click on the graphic to open the Matter window. Select the matter required. You may also type the matter number directly into the Matter field.


4. When editing is complete the grid should be locked again. Follow steps 1 and 2 above to re-lock the grid.

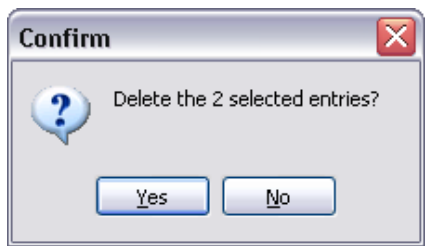
Delete Entries

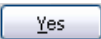


Entries may be deleted from the database if they have been incorrectly added.

NOTE: This option should be used with caution!!

1. In the Documents list, highlight the entry to be deleted.
2. Click on the  button on the toolbar. The following message will display:




3. Click on the  button to confirm the deletion.

NOTE: This action does not delete the actual file from your system; it only hides the reference to the file in the Affinity database. Your System Administrator will confirm the deletion before the entry is finally removed, and may also delete the actual file where necessary. Your System Administrator may also restore the document if you accidentally deleted the file from within Affinity.



Hands on

1. Open Excel and begin a new worksheet.
2. Type "15,000" into one of the cells and then save the spreadsheet to the desktop. Name the file *DM Figures*.
3. Close Excel.
4. Open matter **012352**.
5. Click on the "Documents" tab.
6. Click on the  button.
7. *Path:* browse to your spreadsheet file.
8. *Description:* Proposed Figures for Submission to Client
9. *File Type:* spreadsheet.
10. Click on **[OK]**.
11. Locate the new document entry for this spreadsheet in the "Documents" list.
12. Change the matter to **990168**.
13. Refresh the list. You should see that the file is removed from the current matter.
14. Open matter **990168** and select the "Documents" tab.

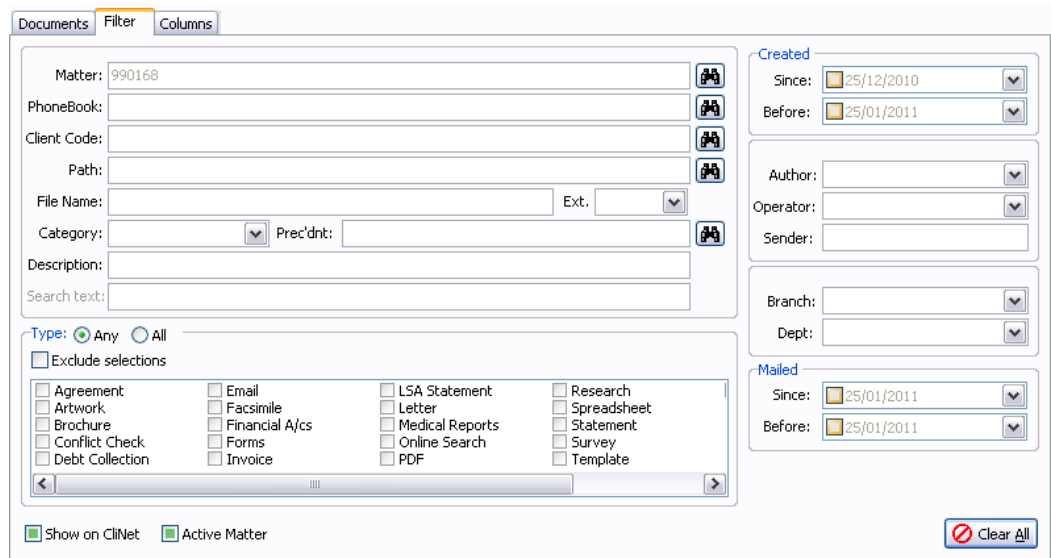
An entry for the spreadsheet file will display in this list.


14.9 Filters

The **Filters** window is used to narrow down the selection of documents displayed. For example, after viewing the complete list of documents for a PhoneBook entry, you may wish to narrow down the list by date range, by matter number or by file type. These are just a few of the criteria available for filtering a list.

To filter a document list:

1. Display the document list (in the Matter, Client, PhoneBook or DM window);
2. Click on the "Filter" tab.



3. Click on the  button to clear the previous selections.
4. Enter the filter criteria required (see below for examples).
5. Click on the "Documents" tab to display the results.

Filter Examples

Example 1: List all documents created since 1/05/2010 where John Woodward is the author.

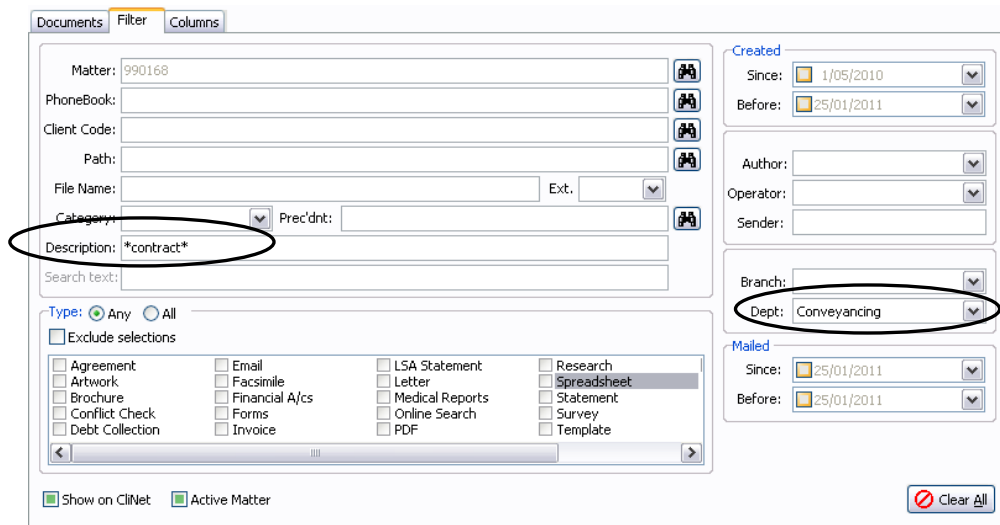
The screenshot shows the LexisNexis filter interface. The 'Created' section is configured with 'Since' set to 1/05/2010 and 'Author' set to John Woodward. The 'Type' section has 'Spreadsheet' selected. The 'Matter' field is set to 990168. The 'Created' section also has 'Before' set to 25/01/2011. The 'Mailed' section has 'Since' and 'Before' both set to 25/01/2011. The 'Type' section has 'Any' selected. The 'Exclude selections' checkbox is unchecked. The 'Show on Clnet' and 'Active Matter' checkboxes are checked. The 'Clear All' button is visible at the bottom right.

Example 2: List all spreadsheets created by author Yvette Rogers.

The screenshot shows the LexisNexis filter interface. The 'Created' section is configured with 'Since' set to 1/05/2010 and 'Author' set to Yvette S Rogers. The 'Type' section has 'Spreadsheet' selected. The 'Matter' field is set to 990168. The 'Created' section also has 'Before' set to 25/01/2011. The 'Mailed' section has 'Since' and 'Before' both set to 25/01/2011. The 'Type' section has 'Any' selected. The 'Exclude selections' checkbox is unchecked. The 'Show on Clnet' and 'Active Matter' checkboxes are checked. The 'Clear All' button is visible at the bottom right.

NOTE: Spreadsheets will be recognised only if they have been flagged as this “type” of document when they have been added to the document list.

Example 3: List all documents created by the Conveyancing Department where the description contains the word “contract”.




The screenshot shows the Document Management window with the following settings:

- Matter: 990168
- PhoneBook:
- Client Code:
- Path:
- File Name:
- Ext:
- Category:
- Prec'dnt:
- Description: ***contract*** (circled in red)
- Search text:
- Type: Any All
- Exclude selections
- Document types: Agreement, Artwork, Brochure, Conflict Check, Debt Collection, Email, Facsimile, Financial A/cs, Forms, Invoice, LSA Statement, Letter, Medical Reports, Online Search, PDF, Research, Spreadsheet, Statement, Survey, Template
- Created: Since: 1/05/2010, Before: 25/01/2011
- Author:
- Operator:
- Sender:
- Branch:
- Dept: **Conveyancing** (circled in red)
- Mailed: Since: 25/01/2011, Before: 25/01/2011
- Show on CLINet: Active Matter:
- Clear All button



Hands on

1. Open the Document Management window.
2. Click on  to clear the filter settings.
3. Use the filter to display all documents where Yvette Rogers is the author.
4. View all documents created today.
5. View all Excel spreadsheet files.
6. View all documents where the description contains the word “Letter”.
7. View all documents created last year where the description contains the word “Letter”.

14.10 Full Text Searching

Lexis Affinity allows for full text searching of documents, i.e. searching for text within the documents themselves as opposed to simply the metadata which was entered at the time of saving the document. Full text searching is achieved via the "Search Text" field on the document filter screen.

NOTE: Lexis Affinity's full text searching functionality needs to be enabled and requires Oracle 11g. Speak to your systems administrator if this option is not available.

Currently, Lexis Affinity full text searching only performs literal text searches; it does not support "Google-style" searching. Therefore searching for "contract for sale" would only return documents containing the *exact* phrase "contract for sale". Keyword searches using "and", "or" etc are not currently supported. When used, these keywords are treated as part of the search criteria (i.e. searching for "contract and sale" will search for documents containing the phrase "contract and sale")



TIP: Searching is not case sensitive, therefore searching for "CONTRACT FOR SALE" would return documents containing "CONTRACT FOR SALE", "Contract for Sale" and "contract for sale".

Full text searching within Lexis Affinity works across most types of documents including Word documents, emails, spreadsheets and searchable PDF files.

Example 4: List all documents created in the last month containing the phrase "contract for sale".

The screenshot shows the Lexis Affinity document filter interface. The 'Search text' field is highlighted with a red circle and contains the text 'contract for sale'. The 'Created' section has 'Since' set to 31/12/2010 and 'Before' set to 31/01/2011. The 'Mailed' section has 'Since' and 'Before' both set to 31/01/2011. The 'Type' section has 'Any' selected. The 'Exclude selections' section includes checkboxes for Agreement, Artwork, Brochure, Conflict Check, Debt Collection, and Email. The 'Show on Clnet' and 'Active Matter' checkboxes are also visible.



TIP: Unlike the "Description" field you do not need to use wildcards when searching (i.e. *).

14.11 Print Documents in Microsoft Word

While it is possible to continue using the printing features of Microsoft Word, it is strongly recommended that the **DM Print** function is used for all print jobs sent from Word (regardless of whether the document has been created using DM). This is because selection of the correct stationery from the correct bin is much simpler. If using DM Print, you will **not** usually need to set a paper source under Word's Page Setup menu.

Print Styles

A "Print Style" is a print job configuration which sets the printer and the bin for each page of a print job. Examples of Print Styles are:

1. HP LaserJet Level 1 - Letters
2. HP LaserJet Level 1 – White A4
3. Canon Laser 3rd Floor – Letters
4. Canon Laser 3rd Floor – File Copy

Printing a Document

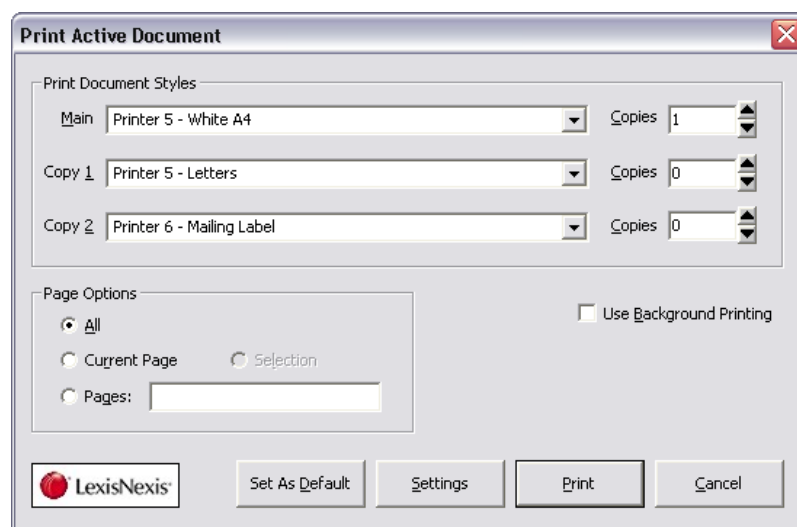
To send a print job:

1. Click on the **[Print]** button on the Lexis Document Toolbar.



TIP: The file to be printed must be open in the active window. If you have a number of documents open in Word, only the file in the active window will be printed.

The following dialog box will display:



Three Print Styles will be listed by default (these defaults can be changed).

2. Beside the style required, enter the number of copies required (usually 1). It is possible to send multiple copies against all three print styles at once.
3. Make other selections such as the pages to be printed (the dialog box defaults to "All").
4. Click on the **[Print]** button to send the job to the selected printer/s.

Selecting a Print Style not Shown

To select a Print Style other than one of the three default Print Styles, click on the down arrow beside one of the Print Style boxes. A list of all available Print Styles will drop down. Select the required style then proceed as described above.

Changing the Default Print Style Selection

To change the printing defaults you get each time you click on the DM **[Print]** button:

1. Select the required Print Style in the three style boxes by clicking on the down arrow beside the style name and selecting a style from the drop-down list.
2. Click on the default number of copies required for each style.
3. Click on the **[Set As Default]** button to set these selections as your default option.

Background Printing

Click on the box beside "Use Background Printing" to select background printing.

It is necessary to select this option if the document contains borders, otherwise the lines will not print. To save this setting for future print jobs, click on **[Set as Default]** before printing the document.

14.12 Saving Emails from Outlook

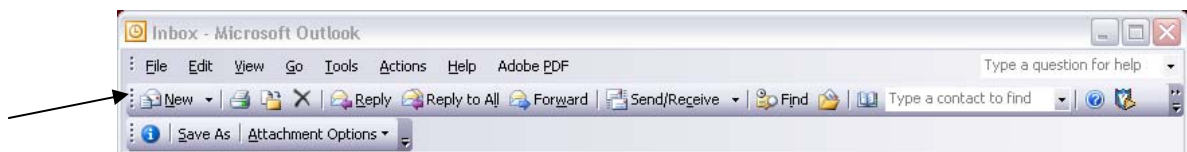
The Lexis Email Toolbar saves email messages and their attachments, and records the entries in the Lexis Affinity database.


Pre-Requisites

- This utility works with Microsoft Outlook 2003 and above. Outlook Express is not supported.
- Microsoft Word must not be used as the email editor in Outlook 2003.
- Outlook must be connected to a Microsoft Exchange Server.

Lexis Email Toolbar

When installed, the Lexis Email Toolbar will display inside Microsoft Outlook.



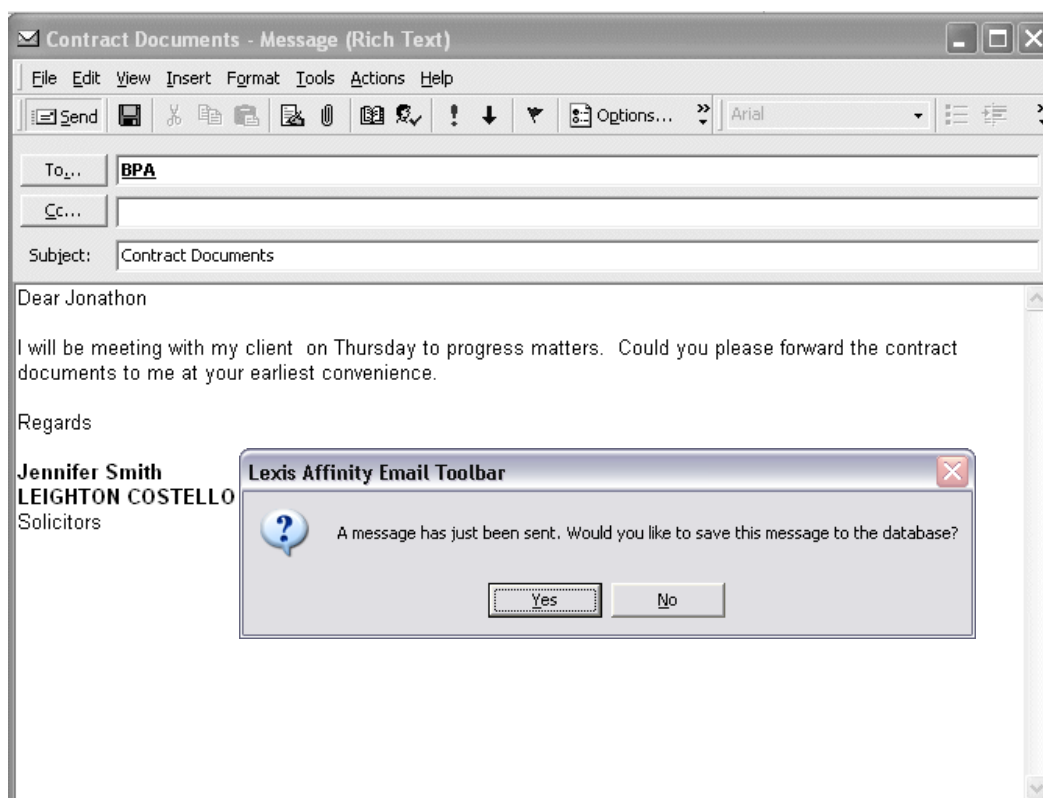
The  button is visible in the following Outlook windows:

- Inbox
- Outbox
- Drafts
- Sent Items
- Deleted Items
- Message window (when the message is open) except the new message window and open messages in the Drafts and Outbox folders.

14.13 Saving Emails and Attachments

Emails Sent from the New Message Window

The **Save As** button does not display in the new message window. When an email is sent, you will be prompted to save the email into the Lexis Affinity Library database.

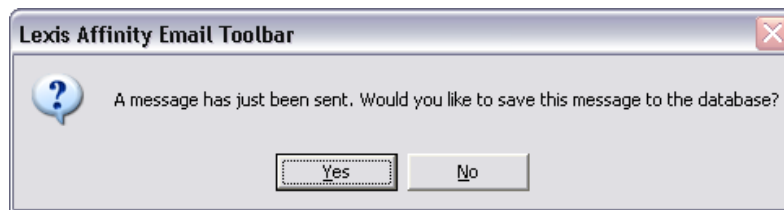


NOTE: The above prompt will display only if it has been turned on. You may turn it on or off at any time. In Outlook, click on Tools, Options, DMEmail and check the box beside "Remind to save message when it is sent".

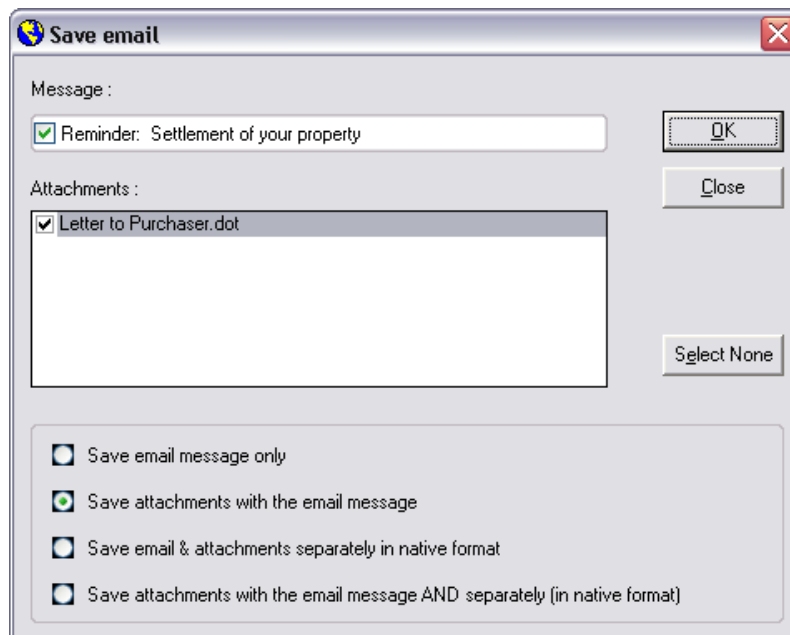
If you do not have this feature turned on, sent emails can be selected in the Sent Items folder, then clicking on **Save As**

PROCEDURE

1. Create a new email message and then select **[Send]**. The following message will display:



2. Select **[Yes]** to save the message to the database. The "Save Email" dialog box will display:



NOTE: The message being saved has no attachments.

3. Select **[OK]**. The following dialog box will display:

4. Complete the details in the dialog box. The following fields will be auto-populated with data:

Created: Defaults to today's date.

Operator: Defaults to the user currently logged into Lexis Affinity Library.

Sender: Defaults to the contents of the "From:" field in Outlook. The sender's full email address is inserted or, where the email address cannot be identified, the name of the sender is inserted.

Description: Defaults to the contents of the "Subject:" field in Outlook. If the message has attachments, the Description field will also show "[Includes Attachments]".

NOTE: **The contents of these fields may be modified before saving.**

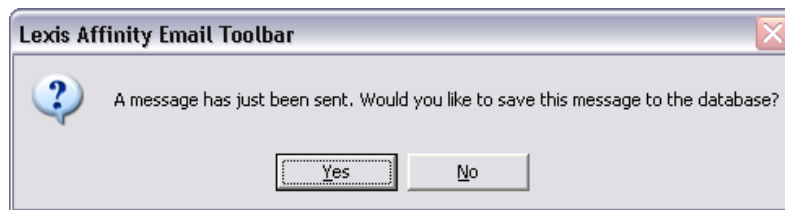
5. After completing the required details, click on the **[OK]** button. The message will be saved to disk, and an entry will be created in the Lexis Affinity Library database.

Saving an Email Message with Attachments

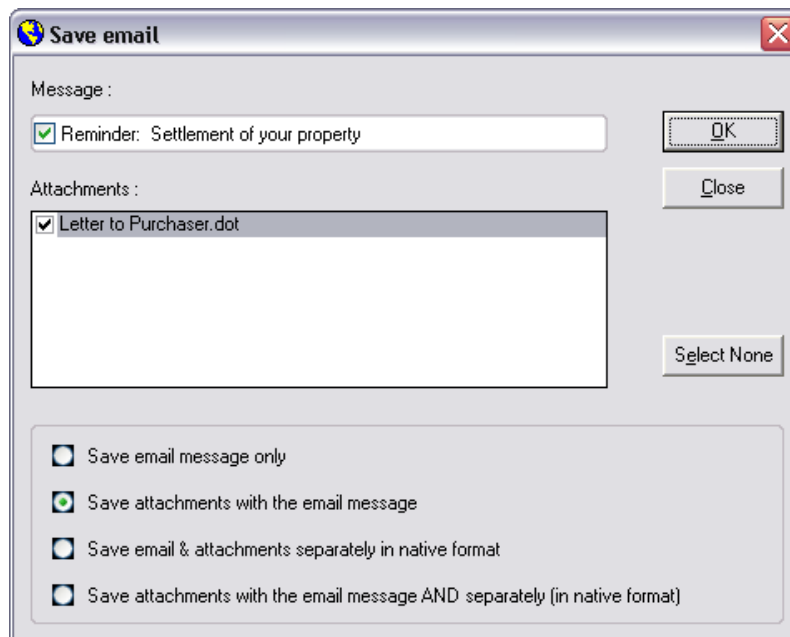


PROCEDURE

1. Create a new email and select the **[Send]** function.
2. When the following message box displays, select **[Yes]**.



3. The "Save Email" dialog box will then display, listing the message and all the attachments.



Save Options

Save email message only

Saves the email message without attachments as an msg file (i.e. native Outlook format). One entry will be added to the documents tab within Lexis Affinity.

Save attachments with the email message

Saves the email and attachments as a single msg file (i.e. the email will be saved in its original format with the attachments). One entry will be added to the documents tab within Lexis Affinity. If you unselect the Email item, each attachment will be saved individually in their native format (as per the following option).

Save email & attachments separately in native format

Saves the email and selected attachments as separate documents in their original format. A separate Save dialog will be displayed for each email/attachment and multiple entries will be added to the Documents tab within Affinity.

Save attachments with the email message AND separately (in native format)

Saves the email and attachments as a single msg file (i.e. the email will be saved in its original format with the attachments) AND also saves the attachments as separate documents in their original format. A separate Save dialog will be displayed for each email/attachment and multiple entries will be added to the Documents tab within Affinity.



TIP: When installed the default option is "Save attachments with the email message". You can change the default by clicking the "Attachment Options" button on the Lexis Email Toolbar and choosing the required save option.

4. Select the items to be included and then select **[OK]**.

Each item, including the email itself has a tick box next to it. You can choose to select which items you wish to save by ticking the relevant item. If you are only interested in the attachment(s) you can unselect the tick box next to the email subject. This will save each attachment as an individual file.

The screenshot shows the 'Save Email' dialog box with the following details:

- Matter:** [Empty]
- Phonebook:** [Empty]
- Description:** Reminder: Settlement of your property (Includes attachments)
- Created:** 22/03/2012
- Mailed:** 22/03/2012
- Author:** Yvette S Rogers
- Operator:** Yvette S Rogers
- Show on CliNet:** [Unchecked]
- From/Sender:** ysr@lewreid.com.au
- Precedent:** [Empty]
- Category:** [Empty]
- Department:** Dust Disease
- Branch:** Sydney - Lewisham Reid
- Type(s):**
 - Agreement
 - Artwork
 - Brochure
 - Conflict Check
 - Debt Collection
 - Email
 - Facsimile
 - Financial A/cs
 - Forms
 - Invoice
 - LSA Statement
 - Letter

5. Complete the details and then select **[OK]**.

Note that the "Description" field will indicate whether attachments are included. The "Email" document type is selected automatically.

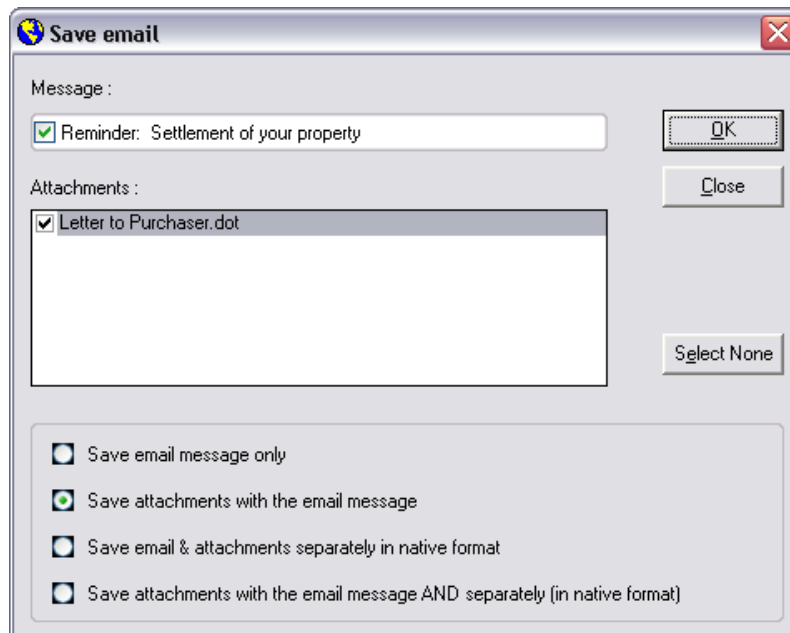
Saving from the Sent Items Folder

You may also save an email you have sent from the Sent Items folder. The **Save As** button will display in the both the main window, and the open message window. The procedure for saving the email is the same from both windows.



PROCEDURE

1. Open the **Sent Items** folder.
2. Either open the email to be saved or simply highlight (select) the email in the list of sent emails.
3. Click on the **Save As** toolbar button.



4. Select the items to be saved.
5. Click on **[OK]**. The "Save Email" dialog box will display:

Save Email

Matter:

Phonebook:

Description: Reminder: Settlement of your property
(Includes attachments)

Created: 22/03/2012 Mailed: 22/03/2012

Author: Yvette S Rogers

Operator: Yvette S Rogers Show on Clnet

From/Sender: ysr@lewreid.com.au

Precedent:

Category:

Department: Dust Disease

Branch: Sydney - Lewisham Reid


Type(s): Agreement Debt Collection Forms
 Artwork Email Invoice
 Brochure Facsimile LSA Statement
 Conflict Check Financial A/cs Letter

6. Enter the details and select **[OK]**.

14.14 Saving Emails Received

Received email messages and their attachments may be saved directly from the message window or from the Inbox.

PROCEDURE

1. From either the open message window or the Inbox window, select the  button on the toolbar. The following dialog box will display:

Save email

Message : Reminder: Settlement of your property

Attachments : Letter to Purchaser.dot

Save email message only
 Save attachments with the email message
 Save email & attachments separately in native format
 Save attachments with the email message AND separately (in native format)

2. Select the items to be included
3. Select the relevant save option and then select **[OK]**.

Save Email

Matter: 012402

Phonebook: Antwell Building Company

Description: FW: Reminder: Settlement of your property (Includes attachments)

Created: 22/03/2012 Mailed: 22/03/2012

Author: Melissa Ryan

Operator: Yvette S Rogers Show on CliNet

From/Sender: Jacqui.White@LexisNexis.com.au

Precedent:

Category:

Department: Litigation

Branch: Melbourne - Lewisham Reid

Type(s):

<input type="checkbox"/> Agreement	<input type="checkbox"/> Debt Collection	<input type="checkbox"/> Forms
<input type="checkbox"/> Artwork	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Invoice
<input type="checkbox"/> Brochure	<input type="checkbox"/> Facsimile	<input type="checkbox"/> LSA Statement
<input type="checkbox"/> Conflict Check	<input type="checkbox"/> Financial A/cs	<input type="checkbox"/> Letter

OK Cancel

4. Complete the details and then select **[OK]**.

14.14.1 Saving Multiple Messages

You may select a number of email messages from the Inbox, Sent Items or Deleted Items windows. Use <Ctrl> + left mouse click to select multiple messages.

Each message will be saved individually and you need to complete the "Save Email" dialog boxes for each message selected.

14.14.2 Working Offline in Outlook

If you use Outlook in Offline mode, you will not be able to save messages to the Lexis Affinity Library database. The **Save As** button will continue to be visible but if you activate it, the following message will display:



When you reconnect your computer to the network and Outlook is online, the messages can then be saved to the Lexis Affinity Library database.



TIP: If Outlook is configured to automatically send messages from the Outbox when the workstation is back online, you will need to go to Sent Items to find any messages that need to be saved to the Lexis Affinity Library database. When working offline, you may prefer to save new messages to a separate folder in Outlook so that you can easily identify them when you are back online.

14.14.3 Saved Email Files

When an email and/or its attachments are saved using Document Management, the email message and the attachments are saved onto disk. The files are saved into the standard folder structure set up for Document Management in Microsoft Word.

- An email message will be named using the following pattern:

Subject + Underscore + Date & Time Sent/Rec'd + .msg

For example:

Fire Drill Notification_20060107121430.msg

The above message had a subject line of "Fire Drill Notification" and was sent or received on 1/7/2006 at 12:14am.

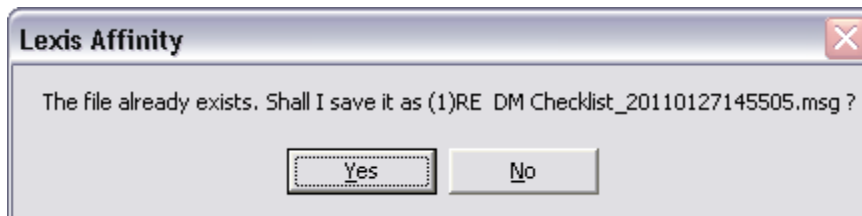
- Note that the "Created" column in the database will show the date the email was saved to the database, not the date the email was sent or received.

14.14.4 Deleting Emails in Outlook

It is not necessary to keep an email in Outlook once it has been saved into the Lexis Affinity Library database. You may continue to delete emails as usual, once they have been saved in the database.

14.14.5 Duplicate Emails












There may be instances where users save an email message and/or its attachments when it has been saved previously. If this occurs, the following prompt will display:



- Select **[Yes]** to save the email again with a **(1)** prefix in the file name. If the file is saved again, a **(2)** prefix will be added to the file name and so on.
- Selecting **[No]** will not save the file at all.
- The above rules also apply for attachments, where they have been saved separately.

14.15 Displaying the "Saved" Column in Outlook

To indicate which email messages have been saved into Lexis Affinity Library, a column entitled "Saved" may be added to the various folders in Outlook (eg. Inbox, Sent Items). This is a user option rather than a global option, so each user must customise the column layout to see the "Saved" column.

Sent Items				
			Subject	Sent
	No		RE: Corp details	Fri 28/01/2011 11:17 AM
	Yes		Corp details	Fri 28/01/2011 10:52 AM
	Yes		RE: Exchange Integration	Fri 28/01/2011 10:15 AM
	No		RE: DM Checklist	Fri 28/01/2011 9:47 AM
	Yes		RE: DM Checklist	Thu 27/01/2011 2:57 PM
	Yes		RE: Indictment List	Thu 20/01/2011 9:55 AM

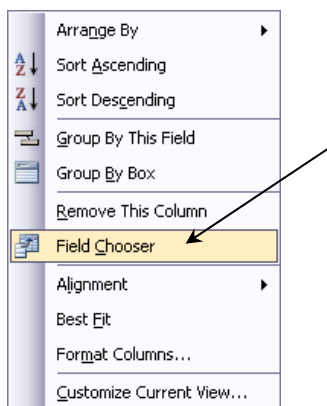
A **Yes** in the "Saved" column indicates the message has been successfully saved to the database.

A **No** in the "Saved" column indicates the email was not successfully saved to the database. This could be due to the user closing or cancelling the "Save As" dialog boxes, or there has been a failure in connecting to the database during the save process.

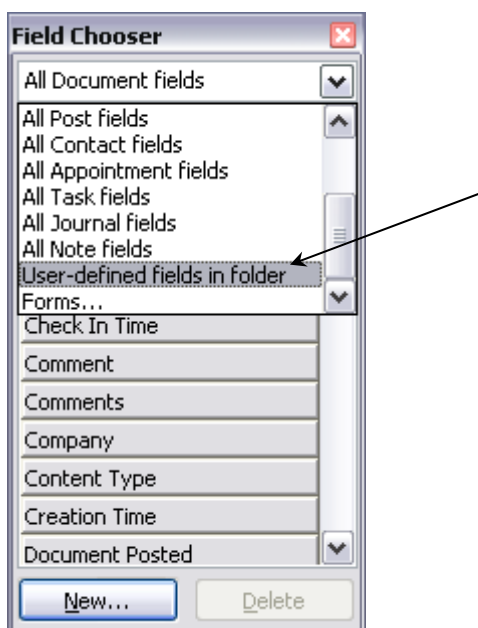
Emails sent and received prior to implementation of this feature will show a blank in the "Saved" column. A blank value will also display against any emails that have not had a "Save As" procedure actioned on them.

To add the "Saved" Column

1. Display the **Inbox** (or other Outlook folder).
2. Right-click on any of the column headings in the current view and then select **Field Chooser**.



3. Click on the drop-down arrow at the top of the dialog box and select "User-defined fields in folder"



4. A dialog box similar to the following will display:



The "Saved" item will only appear in this dialog box if you have previously saved an email from this folder using the "SAVE AS" button.

If it does not display, return to the folder and save an item to the database. Then return to this dialog box and continue.

5. Click-and-drag the "Saved" item onto your column headings in the position you would like it to display. You can reposition the column later if required.
6. Close the "Field Chooser" dialog box.

NOTE: The above procedure must be repeated for all Outlook folders in which the "Saved" column is required.

14.16 Displaying Emails in Lexis Affinity Library

Depending on the method used for saving an email and its attachments (if any), one or more entries will be written to the Lexis Affinity Library database.



An envelope icon in "Path" field indicates the entry is an email.



A small block symbol followed by the words "[Includes Attachments]" indicates that the message has attachments within it. When you open the messages, you will also see the attachments.

NOTE: An attachment saved separately (without the message) will always be shown as a separate database entry. The icon shown in the "Path" field will match the file type. For example, an attachment that is a Word document will display with the standard Microsoft Word icon.

Icon	Path	Name	Created	Description	Author	Operator
✉	W:\BDP-001\RE	Precedents RE: Precedents for Affinity 233	5/01/2007 8:03:47 AM	RE: Harris Publishing [Includes attachments]	Yvette S Rogers	Yvette S Rog
📄	W:\BDP-001\P_YSR_016.DD	P_YSR_016.DOC	5/01/2007 8:01:37 AM	Letter to debt collection agency	Yvette S Rogers	Yvette S Rog
📄	W:\BDP-001\P_YSR_015.DD	P_YSR_015.DOC	4/01/2007 5:01:53 PM	Letter enclosing Cost Agreement	Yvette S Rogers	Yvette S Rog
📄	W:\BDP-001\P_YSR_014.DD	P_YSR_014.DOC	4/01/2007 5:01:23 PM	Professional Letter BDP-001 for matter 012399: Dem	Yvette S Rogers	Yvette S Rog

14.17 Displaying Messages using Filters

You can use the **Filter** window to narrow down the selection of files, and display email messages only.

You can either:

- Tick the "Email" box in the Type field. This relies on users consistently marking saved emails as this type.

OR

- Enter ***.msg** in the "Path" field to display only email messages. This is more reliable as it will pick up any file with a **.msg** extension.

The screenshot shows the 'Filter' window in LexisNexis. The 'Path' field is set to '*.msg'. In the 'Type' section, the 'Email' checkbox is checked. The 'Created' section shows 'Since' as 28/12/2010 and 'Before' as 28/01/2011. The 'Mailed' section shows 'Since' and 'Before' as 28/01/2011. A 'Clear All' button is visible at the bottom right.

Field	Value
Matter:	990168
PhoneBook:	
Client Code:	
Path:	*.msg
File Name:	
Ext.:	
Category:	
Prec'dnt:	
Description:	
Search text:	
Type:	Any
Exclude selections:	
Agreement	<input type="checkbox"/>
Artwork	<input type="checkbox"/>
Brochure	<input type="checkbox"/>
Conflict Check	<input type="checkbox"/>
Debt Collection	<input type="checkbox"/>
Facsimile	<input type="checkbox"/>
Financial A/cs	<input type="checkbox"/>
Forms	<input type="checkbox"/>
Invoice	<input type="checkbox"/>
LSA Statement	<input type="checkbox"/>
Letter	<input type="checkbox"/>
Medical Reports	<input type="checkbox"/>
Online Search	<input type="checkbox"/>
PDF	<input type="checkbox"/>
Research	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>



TIP: Remember that if attachments have been saved separately, and not as part of the message, they will have an extension corresponding to their file type (eg. Word documents have a .doc extension)

14.18 Auto-Profiling of Emails

Lexis Affinity has the ability to automatically save emails sent and/or received into the Lexis Affinity database. This is done by Lexis Affinity searching for specific metadata entered into the subject of the email.

When creating a new message, click on the Select Matter or Select Phonebook button on the Outlook toolbar to insert this metadata.

14.18.1 The Lexis Email Toolbar – New Messages

The Lexis Email toolbar for new messages will be displayed when creating a new email or forwarding an existing email.



Select Documents: Allows you to attach documents saved using Lexis Affinity Library.

Select Matter: Inserts a matter number in a pre-defined format into the subject line of the email.

Select PhoneBook: Inserts the unique ID of a phonebook record in a pre-defined format into the subject line of the email.

14.18.2 Associating a New Email Message with a Matter

Complete the following steps to associate a new email message with a Lexis Affinity matter number.

PROCEDURE

1. Create a new email within Outlook. Enter a recipient email address (any) and subject.
2. Click the **[Select Matter]** button. The following dialog will be displayed:

Client	Description	File	Partner	Author	Type
Antwell Building Company	Antwell -v- General Insurance Company	012402	MER	MER	LITIG
Ares Military Research Pty Lt	Ares v TRC	2030434	MER	MMC	COMP
Ares Military Research Pty Lt	Contract to produce Assault Rifles	ARE5-002	RKD	ADV	ADV
Ares Military Research Pty Lt	Potential Redundancies Advice	012352	MMC	DJA	EMP
Black Day Publishing Pty Ltd	Contract of Employment - Marketing Manager	012311	MER	DJA	ADM
Black Day Publishing Pty Ltd	Debt Recovery from Harris Publishing	012399	MER	YSR	DEBT
Black Day Publishing Pty Ltd	Debt Recovery from Regents Park Books	012326	MER	YSR	DEBT
Black Day Publishing Pty Ltd	Debt Recovery from The Open Book	012347	MER	YSR	DEBT
Black Day Publishing Pty Ltd	Debt from Gemini Ski Hire	990105	MMC	YSR	DEBT
Black Day Publishing Pty Ltd	General advice annual retainer	040705	RKD	PGL	ADV

3. Select matter 012399 from the matter list or click the Filter tab and enter the search criteria.
4. Click the [OK] to insert the matter number in the message.



TIP: The metadata that is used to identify matters / phonebook records is customisable by your system administrator. In the above example (Ref: 012399) was inserted. Outlook will look for (Ref: xxx) to identify matter information (where xxx is any valid matter number).

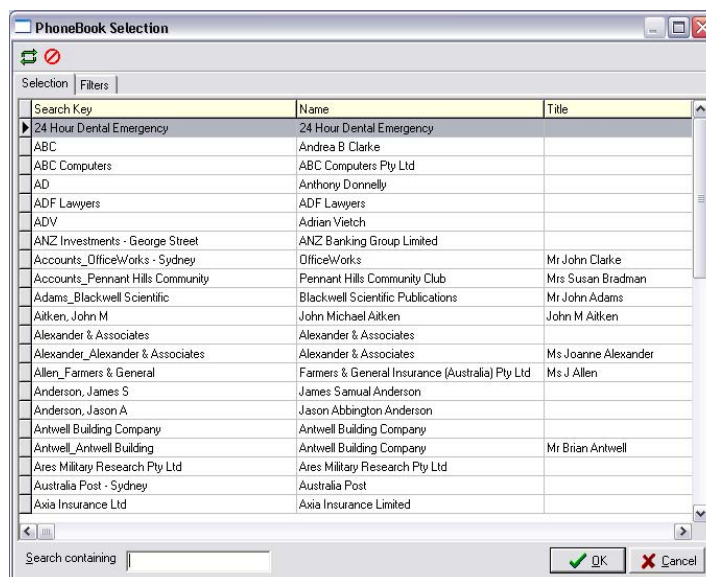
5. Finish preparing the message then click Send. If you have the option turned on to automatically profile sent messages, the email will automatically be saved to Lexis Affinity. Open the Sent Items folder in Outlook. The Saved column for the sent email should read "Yes".

14.18.3 Associating a New Message with a Phonebook Record

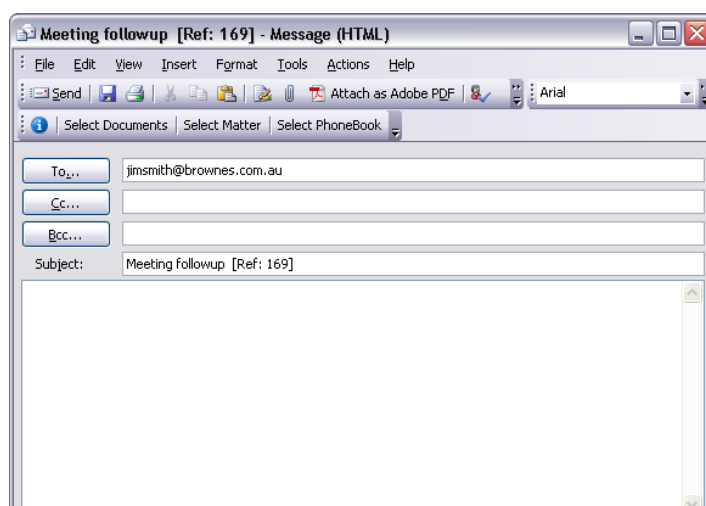
Complete the following steps to associate a new or forwarded message with an existing phonebook record. Do this when the message is not related to any matter.

PROCEDURE

1. Create a new email within Outlook. Enter a recipient email address and subject.
2. Click the **[Select PhoneBook]** button. The following dialog will be displayed:



3. Select "Antwell Building Company" from the PhoneBook list or click the Filter tab and enter the search criteria.




4. Finish preparing the message then click Send. If you have the option turned on to automatically profile sent messages, the email will automatically be saved within Affinity. Open the Sent Items folder in Outlook. The Saved column for the sent email should read "Yes".

14.18.4 Automatically Saving Received Emails

Lexis Affinity Library can also automatically save received emails as they arrive if you have the appropriate settings turned on.

If an email is received whilst Outlook is running, Affinity will attempt to automatically save the new email immediately. The email will be successfully saved if a valid matter number or phonebook identifier is found in the correct format within the subject line of the email.

If an email is received whilst Outlook is not running, Affinity will attempt to automatically save the new email(s) once Outlook is opened. Depending on your system settings this may happen immediately or after at least 10 minutes.

Messages which you send offline (using a PDA device or Outlook web client) may not always get profiled automatically. In this case select the message you wish to save and click the  button on the Lexis Email Toolbar.

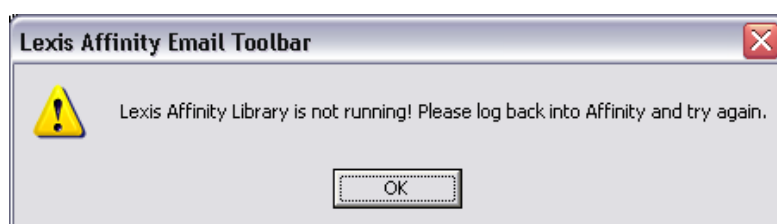


TIP: The default attachment option is used when emails are automatically profiled. To change the default attachment option click the Attachment Options drop down list on the Lexis Email Toolbar and select the appropriate saving method. The default setting is "Save attachments with the email message".




IMPORTANT

To ensure emails are saved successfully it is important to ensure that Lexis Affinity is running **before** starting Outlook. If Outlook attempts to automatically save an email whilst Lexis Affinity is closed you may get a message similar to below:



To ensure subsequent emails are automatically saved successfully, close Outlook. With Outlook closed launch Lexis Affinity, then restart Outlook.

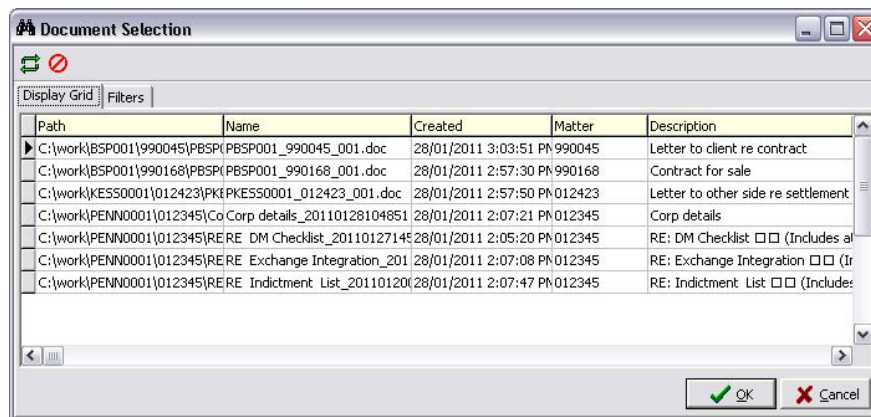
NOTE: Lexis Affinity will only attempt to automatically profile messages which have a blank value in the "Saved" column. If a message has "No" in the Saved column, it will not be automatically profiled. In this case you will need to manually save the message by clicking on the  button.

14.19 Attaching Documents to Emails

You can attach documents which have been saved in Affinity directly from within Outlook by clicking the **[Select Documents]** button.

PROCEDURE

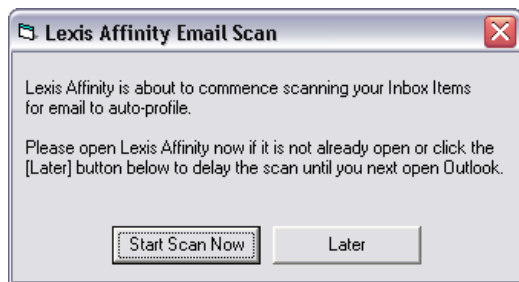
1. Create a new email within Outlook.
2. Click the **[Select Documents]** button. The following dialog will be displayed:



3. Select the required document(s) to attach. To select multiple documents hold down the CTRL key whilst selected the relevant documents.
4. The document list is filtered to show only documents for the last month. To find the required document, you may need to select the Filters tab and enter different search criteria.
5. Click **[OK]** to insert the selected document(s).

14.20 Scanning your Inbox

When autoprofiling is activated on your workstation, Lexis Affinity interrogates each email as it arrives in your Inbox to determine whether or not to save it. However, some emails will arrive in your Inbox while you have Outlook close (eg. overnight). So that no emails are missed, whenever you open Outlook, Lexis Affinity will perform a scan to find emails that have yet been checked. There is a delay of at least one minute before the scan commences. When the scan starts you will see the following dialog box:



Select Start Scan Now to commence the scan. You will see a progress dialog as the scan processes. On completion, the progress dialog will disappear.

Select Later if you do not want to perform the scan now. You will have another opportunity to next time your open Outlook.

15. Tasks

Tasks are the activities that need to be actioned for a matter. They include but are not limited to court appearances, meetings, producing documents, telephone calls and emails. Tasks typically have a date assigned to them but do not have a specific time associated with them (unless the task is a diary appointment).

The Task List

Tasks are displayed in the Task List. There are three areas where the Task List can be viewed:

1. In the Diary by displaying the "Daily" view.
2. In the matter window by displaying the "Tasks" tab. This will show the tasks for this matter only. This task list can also be filtered.
3. In the Task List program.

How are Tasks Created for a Matter?

Tasks are created for a matter in one of two ways:

- A user creates an ad-hoc task (also known as a Custom Task)
- A Workflow is attached to the matter which assigns the tasks for that matter, and automatically inserts new tasks as earlier tasks are completed. This is known as a Workflow Task.

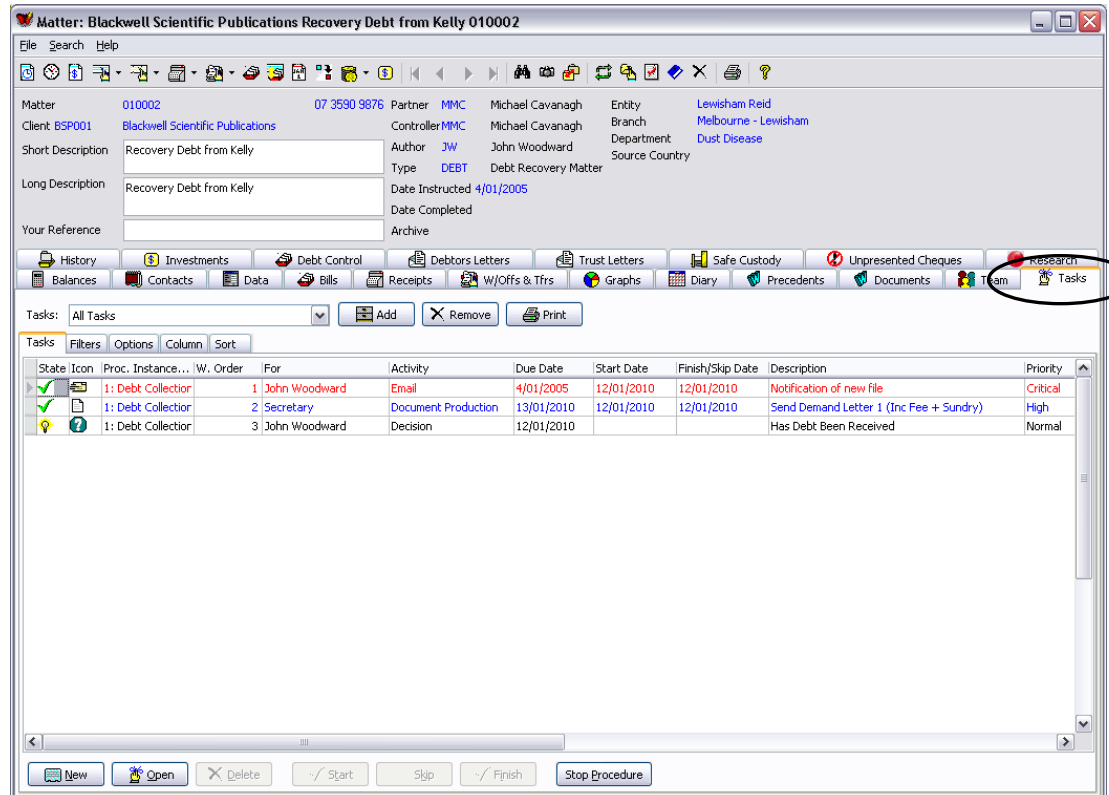
More About Workflow Tasks

Workflow tasks display on the matter as a result of a workflow being attached to that matter. A Workflow is a set of pre-defined steps for a matter according to the matter type. For example, where the firm acts for the purchaser in a conveyancing matter, there are a number of tasks that are generally always performed for that type of matter (eg. exchange of contracts, title searches, building inspections, settlement and so on). Furthermore, these tasks tend to be performed in a specific order and are dependent on each other, in that some tasks cannot be scheduled until another task is complete. A well-designed workflow will set out all the tasks to be performed, including how the date for the task should be determined and any other contingencies that may affect when or how the task is performed.

Workflow tasks populate the matter Task List dynamically, as earlier tasks are performed and as decisions are made (via Decision Point tasks). At the commencement of a matter there may only be two or three tasks on the matter, but as these tasks are completed, new tasks display on the matter.

15.1 Task List in the Matter Window

Tasks can be viewed from the "Tasks" tab in the matter window.







The tasks have different colours applied, indicating the priority for that task (normal, high, critical). For example, critical tasks may display in red. Your system administrator is responsible for defining the colours used to indicate task priority.

Note that not all the tasks generated by a workflow will display on the matter at one time. Many tasks will be dependent on completion of earlier tasks and the due date cannot be determined until an earlier task has been completed, or a decision point task has been actioned. As tasks are "finished", new tasks for the matter will display in the list.

The details about each task can be viewed by opening the task or by viewing the details in column layout. You may customise the column layout to suit your requirements.

The column layout will show information such as:

State	Indicates the status of the task.	
	Started	Task has been started
	Finished	Task has been completed
	Not started	Action needs to be taken
	Skipped	Task has been skipped
	Past Due	Task is past its due date


Icon	This column displays icons indicating the type of activity to be performed. Some examples are:
	 Document Production  Email  Telephone Call  Decision Point
For	Identifies the person (or role) allocated to perform the task.
Activity	Identifies the type of task (eg. email, document, decision point).
Due	The date the task is due.
Started	The date the task was started.
Finished/Skip	The date the task was either finished or skipped.
Description	Details of the task to be carried out.
Priority	Indicates the importance of the task (normal, high or critical).

For a complete description of all the details available in the task columns, please refer to section “15.3 Customising Column Display”.

15.1.1 Task Actions


When you have tasks allocated to you, you need to action these tasks. The buttons at the bottom of the “Tasks” window are used to action tasks and to create new tasks.




New	Select this button to create a new ad-hoc task. For further details on creating ad-hoc tasks, refer to section “15.7 Custom Tasks”.
Open	Select this button to open the "Task (Actual)" window for the task you currently have selected. This will enable you to see the details pertaining to this task, including what actions will be performed automatically.
Delete	Select this button to remove an ad-hoc task from the list. You cannot remove workflow or procedure tasks. If a workflow or procedure task does not need to be performed for this matter, use the [Skip] button.
Start	Select this button to start the task. This will change the status of the task to “Started” with the current system date. Tasks that have been started, but not yet finished display a red tick  in the status column.

Skip Select this button to skip a task (only where you do not need to perform the task for this matter.) This updates the status of the task to show “Started” and “Finished” with the current system date. No further reminders will be given.

This option is intended for those tasks that will never be actioned or that users have the authority to ignore. Lexis Affinity Library forces you to skip these tasks (rather than allowing them to be deleted) so that there is a record of what action was taken on a task.

Tasks that have been flagged as Skipped display a  in the status column.

Finish This button flags the task as “Finished” with the current system date. Tasks that have been flagged as finished display a green tick  in the status column.

Stop Procedure

This button ends a workflow procedure. This means no further tasks will be added to the matter from that workflow procedure. Not all users will have access to this functionality.

What Happens When a Task is Started?

Some tasks contain only a description of an action to be performed (eg. phone client). When you select **[Start]** to begin this simple task, there will be no action performed on the system except to flag the task as “started”. (It is appropriate to simply select the **[Finished]** button for these tasks once the activity has been performed.)


However, many tasks will include automated functions such as generation of a document or email, creation of a cheque request, creation of a diary appointment and so on. When you select **[Start]** on these tasks, you will see various windows opening and actions being performed. You may need to enter further details (eg. into dialog boxes) for some of these automated actions.

You should select the **[Finished]** button only when all of these automated functions have run and been completed.



Hands on

In this series of exercises you will register a new debt recovery matter and process the debt recovery workflow.

1. Open the client **Consolidated Supplies Pty Limited**.
2. Click on  to create a new matter.
3. Enter the details as follows:

- Partner* Leave as MMC
- Controller* Select AD from the drop down list
- Author* Select your own logged-in user
- Type* Select DEBT from the drop down list
- Description* Debt Recovery from L A Peterson & Sons <TAB>

4. Select the “Analysis” tab:

- Branch* Sydney
- Department* Commercial

5. Select the “Miscellaneous” tab.

Note that the Workflow **DEBT - Debt Recovery** has been automatically inserted.

6. Select the “Team” tab

Load From: Select “NSW Work Team”

The members of the team will display.

- Select the “Billing” tab.

Billing Template: Select “Detailed Bill Template”

Tax Status for New Bills Select “Taxable Bill”

- Click **[OK]** to create the new matter. If you are prompted to print the instructing letter, answer **No**.

The matter has been successfully created and the matter number is allocated and displayed on the screen.

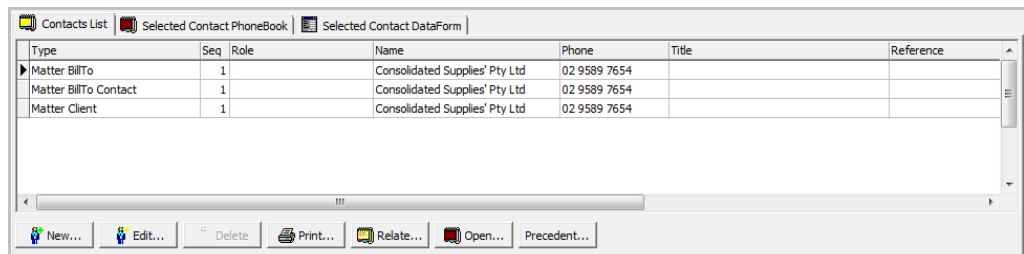
Make a note of the matter number allocated as you will be using this matter in later exercises.

- Close the client window.
- Open the matter you just created.

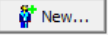


TIP: You can click on the down arrow beside the Matters toolbar button to display the recently used records.

- Select the “Contacts” tab to add the other party to the matter.




Type	Seq	Role	Name	Phone	Title	Reference
Matter BillTo	1		Consolidated Supplies' Pty Ltd	02 9589 7654		
Matter BillTo Contact	1		Consolidated Supplies' Pty Ltd	02 9589 7654		
Matter Client	1		Consolidated Supplies' Pty Ltd	02 9589 7654		

- Click  to add a new contact.

13. Enter the details in this dialog box as follows:

Type Select “Other Party”.

Role Select “Debtor”

14. Click on  to open the Phonebook and select L A Peterson & Sons

15. Click  to update the matter.

16. The “Contacts” tab should now show the Debtor’s name.

Type	Seq	Role	Name	Phone	Title	Reference
Matter BillTo	1		Consolidated Supplies' Pty Ltd	02 9589 7654		
Matter BillTo Contact	1		Consolidated Supplies' Pty Ltd	02 9589 7654		
Matter Client	1		Consolidated Supplies' Pty Ltd	02 9589 7654		
Other Party	1	Debtor	L A Peterson & Sons	02 9245 6899		

The matter is now set up and you are ready to process tasks.




Hands on

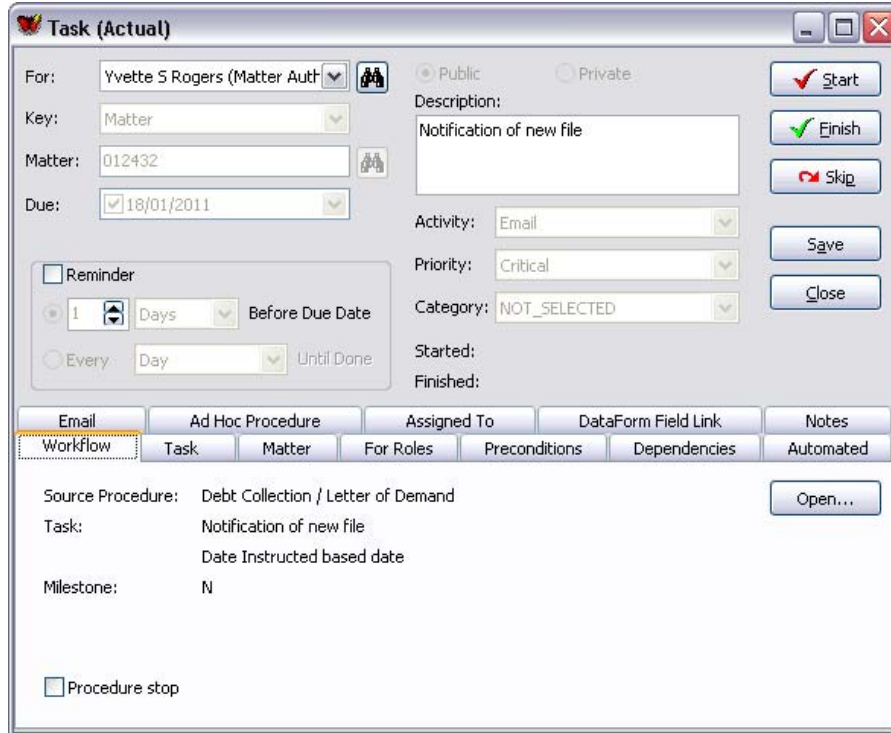
1. Open your matter and select the “Tasks” tab.

The following tasks will display:


State	Icon	Proc. Instance ID	W. Order	For	Activity	Due Date	Start Date	Finish/Skip Date	Description	Priority
		1: Debt Collector	1	Michelle Downs	Email	22/02/2008			Notification of new file	Critical
		1: Debt Collector	2	Secretary	Document Production	28/02/2008			Send Demand Letter 1 (Inc Fee + Sundry)	High

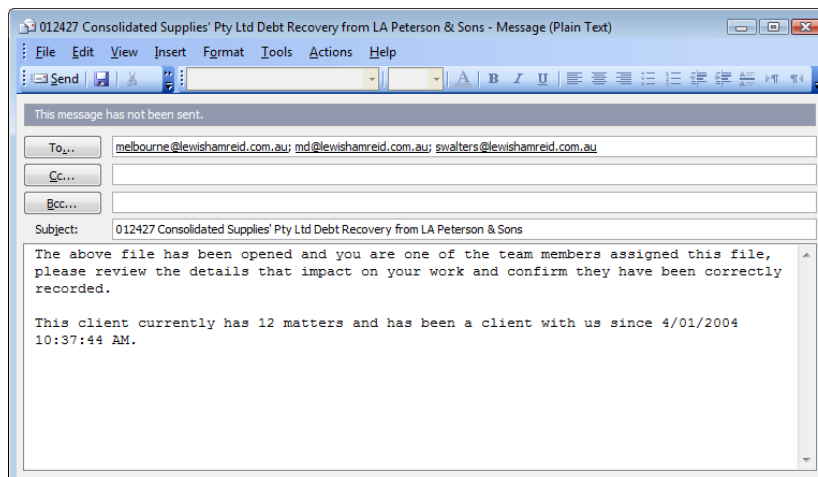
2. Select the first task and click the  button.

The Task dialog box will display




TIP: You can double-click on a task to open the task's dialog box.

3. Click on  and the following email will be produced.



(close this window without sending)

Word will now be launched and the first Letter of Demand produced by merging the information entered on the DataForm and details of the matter registration.

The Task also has ancillary functions attached, which include recording a Postage charge and a Fee Entry.

Branch: SYDNEY
Our Ref: 012425;XXX

9 November, 2009

L A Peterson & Sons
GPO Box 6547
SYDNEY NSW 2001

Dear Sir/Madam

**RE: Debt Owing to Consolidated Supplies' Pty Limited
Invoice Number H1234**

We act on behalf of the above named. We are instructed that you are indebted to our client in an amount of \$16,500.00 for building materials and supplies during June 2002. Despite previous requests you have failed and neglected to settle the outstanding account.

We are instructed by our client to issue legal proceedings against you to collect this debt unless payment in full is made or a repayment agreement is reached within seven days.

Please telephone our office at your earliest convenience to avoid legal action.

Yours faithfully
Lewisham Reid

Yvette S Rogers



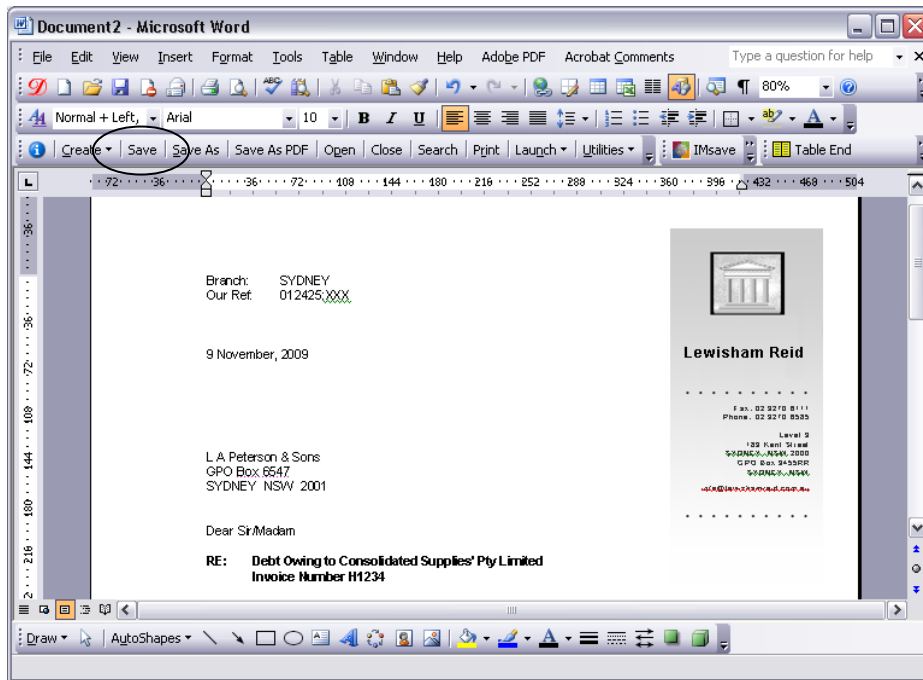
Lewisham Reid

Fax: 02 9270 8111
Phone: 02 9270 8535


Level 5
132 Kent Street
SYDNEY NSW 2000
GPO Box 2455RR
SYDNEY NSW

yle@lewisreid.com.au

7. If Document Management is installed, save the document using the Lexis Affinity **Save** function.



Note that many details have already been populated by Lexis Affinity. You can edit these details as required.

8. Close the document.
9. Click  to flag the task as finished. Close the task.
10. Click the “Data” tab and select the **Debt Recovery** DataForm.

The following screen displays:

These details were entered via the DataForm at the time of document production.

11. Click the “Balances” tab

The segment of the “Balances” information is shown below:

Work in Progress - Scale Cost	\$100.00	WIP
Unbilled Disbursements		Disburse
Anticipated Disbs - Unbilled - Debtors		AntDisb
Sundries	\$4.09	Sundry

Amounts are now showing against Work in Progress and Sundries.

Lexis Affinity has entered these amounts automatically. You can view the WIP and Sundry Ledger if required.

12. Select the “Documents” tab to view the documents generated.

Icon	Path	Name	Created	Description
	C:\DOCUMENTS\DD\MD\0124\	PDD_MD_012424_001.DOC	25/08/2008 11:06:48	Professional Letter CSP001 for matter 012427: D

13. Click the “Tasks” Tab.

State	Icon	Proc. Instance ID	W. Order	For	Activity	Due Date	Start Date	Finish/Skip Date	Description	Priority
✓		1: Debt Collector	1	Michelle Downs	Simple Task	22/02/2008	27/02/2008	27/02/2008	Notification of new file	Critical
✓		1: Debt Collector	2	Secretary	Document Production	28/02/2008	27/02/2008	27/02/2008	Send Demand Letter 1 (Inc Fee + Sundry)	High
?		1: Debt Collector	3	Michelle Downs	Decision	27/02/2008			Has Debt Been Received	Normal

Note the ✓ against the first two tasks, indicating that the tasks have been completed. You will also see that a third task now displays in the list.

14. Open the third task. This is a “Decision” Task.

15. A decision task requires you to select an option from the drop-down list. Select **No**.
16. Click **[OK]**. If the dialog for the next task opens, close it.

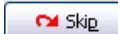

The list of tasks is updated and another 2 tasks have been added as shown below:

State	Icon	Proc.	Instance ID	W. Order	For	Activity	Due Date	Start Date	Finish/Skip Date	Description	Priority
✓	📄	1: Debt Collector		1	Michelle Downs	Simple Task	22/02/2008	27/02/2008	27/02/2008	Notification of new file	Critical
✓	📄	1: Debt Collector		2	Secretary	Document Production	28/02/2008	27/02/2008	27/02/2008	Send Demand Letter 1 (Inc Fee + Sundry)	High
⚠	📄	1: Debt Collector		3	Michelle Downs	Decision	27/02/2008	27/02/2008	27/02/2008	Has Debt Been Received	Normal
⚠	📄	1: Debt Collector		4	Michelle Downs	Email	27/02/2008			Advise client debt not received	High
⚠	📄	1: Debt Collector		5	Michelle Downs	Decision	12/03/2008			Has debt been received	Normal



Hands on

In this exercise you will skip the next task for this matter and then produce the second letter of demand. This task has two automated actions linked to it that allow the user to enter the value of postage and the number of units for a Fee entry.

1. Select the task “Advise client debt not received” and then click on the  button.
2. Open the task “Send Demand Letter 2” (this task appeared in the list after you skipped the previous task).
3. Click on the  button.

The second letter of demand will be produced. (Note that it has drawn the secretary’s details from the Matter Team.)

4. As the task has a sundry associated with it, the Sundry Creation dialog box will display.

Sundry Creation

Matter 012425
Consolidated Supplies' Pty Ltd
Debt Recovery from L A Peterson & Sons

Date 9/11/2009

Type POST Postage

Description Postage for second letter of demand

Tax Rate TAXIN Tax included in price

Units 1.00 Rate \$0.50 Amount \$0.45

Tax \$0.05

Private?

5. Click to post the Sundry item. The Fee Creation dialog box will display.

Fee Creation

Date 9/11/2009

Matter 012425
Consolidated Supplies' Pty Ltd
Debt Recovery from L A Peterson & Sons

Author XXX Yvette S Rogers

Fee Type N Normal Fee

Description Preparation and despatch of 2nd letter of demand

File Note

Time Cost
Units 1.00 Minutes 6
Rate \$500.00
Tax Rate TAX Standard Tax
Amount \$50.00 Tax \$5.00

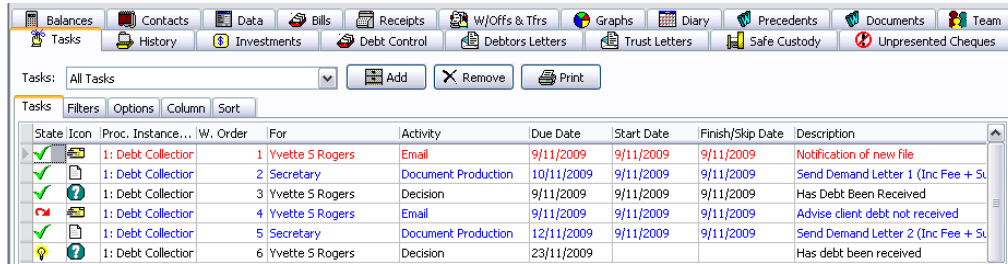
Scale Cost
Units 0
Rate 0
Tax Rate TAX Standard Tax
Amount \$0.00 Tax \$0.00

Department DD Dust Disease
Branch SYD Sydney - Lewisham Reid
Employee Type PAR Partner

Private
Print
Non-Billable WIP

6. Enter "2" in the *Units* field and click .


7. Click  and then . The "Task" tab now looks similar to below:

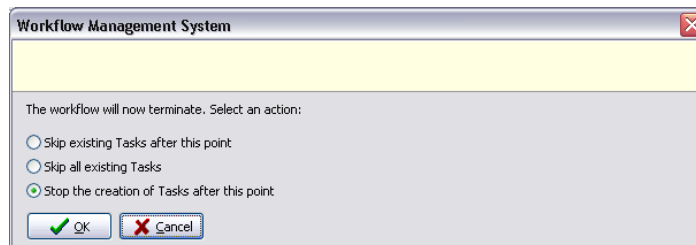



State	Icon	Proc. Instance...	W. Order	For	Activity	Due Date	Start Date	Finish/Skip Date	Description
✓		1: Debt Collector	1	Yvette S Rogers	Email	9/11/2009	9/11/2009	9/11/2009	Notification of new file
✓		1: Debt Collector	2	Secretary	Document Production	10/11/2009	9/11/2009	9/11/2009	Send Demand Letter 1 (Inc Fee + Sl
?		1: Debt Collector	3	Yvette S Rogers	Decision	9/11/2009	9/11/2009	9/11/2009	Has Debt Been Received
✓		1: Debt Collector	4	Yvette S Rogers	Email	9/11/2009	9/11/2009	9/11/2009	Advise client debt not received
✓		1: Debt Collector	5	Secretary	Document Production	12/11/2009	9/11/2009	9/11/2009	Send Demand Letter 2 (Inc Fee + Sl
?		1: Debt Collector	6	Yvette S Rogers	Decision	23/11/2009			Has debt been received

8. Select "Yes" at the next decision point. This is confirming that the other party has now paid the debt, following the second letter of demand.
9. Another decision point will then display. Select "Client" from the drop-down list, indicating that the debt was settled directly with the client.

At this point the Billing sub-procedure will commence. We will stop the procedure at this point.

10. Close the Task that is currently open ("Request Bill to Client from Accounts").
11. Position the cursor on the final task in the list.
12. Click on the  button. The following dialog box will display:




13. Select "Skip all existing Tasks" and click on the  button.


Note that the final task will be flagged as skipped.

14. Open the final task and note the message in the bottom left corner of the window, indicating that the procedure has been stopped, including date and employee initials.

Task (Actual)

For: Yvette S Rogers (Matter Auth)  Public Private

Key: Matter Description: Create a draft bill.

Matter: 012425  Activity: Simple Task

Due: 9/11/2009 Priority: Normal

Category: NOT_SELECTED

Started: Finished:

Reminder

8 Days Before Due Date

Every Day Until Done

Automated	Ad Hoc Procedure	Assigned To	DataForm Field Link
Workflow	Task	Matter	For Roles
			Preconditions
			Dependencies
Source Procedure:	Bill Client	<input type="button" value="Open..."/>	
Task:	Create draft bill		
	None		
Milestone:	N		

Procedure stopped by XXX on 9/11/2009 3:22:32 PM

15. Close this task and close the matter.



TIP: You will only see the button if you have been given "permission" to use this feature in Lexis Affinity Library.

15.2 Attaching a Workflow or Procedure

Where workflows have been created for specific matter types, it is usual for these workflows to be attached automatically to the matter at the time the matter is created.

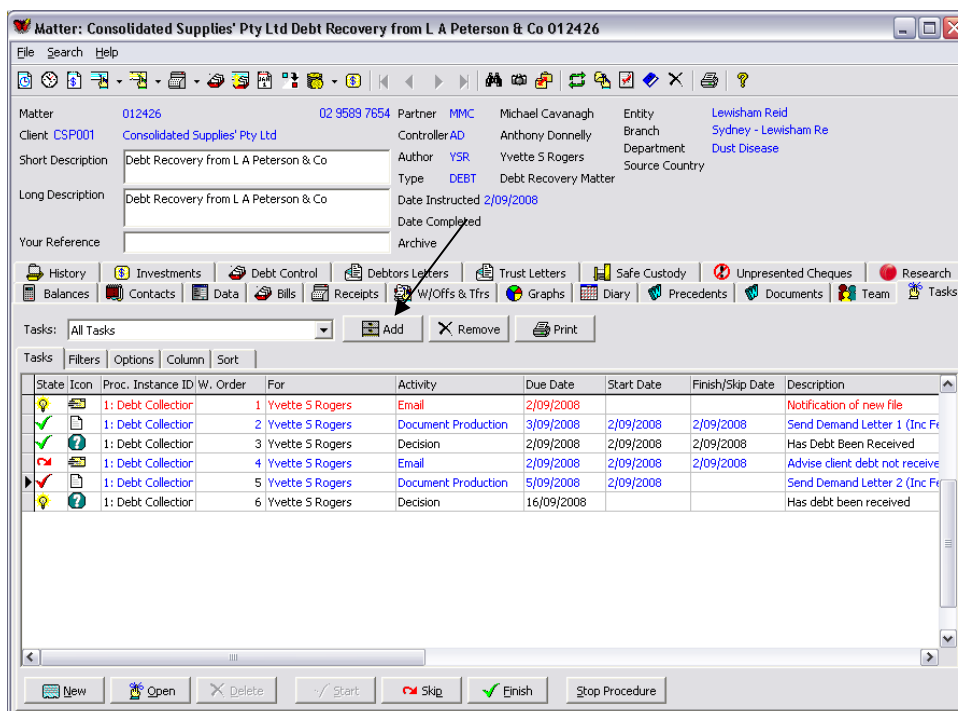
However, you may also attach a workflow or a procedure to a matter at any stage while you are working on the matter. For example, a set of tasks for debt recovery may be required for a particular matter. If your firm has a standard debt recovery workflow, this can be attached to a matter as and when required.

Workflow vs Procedure

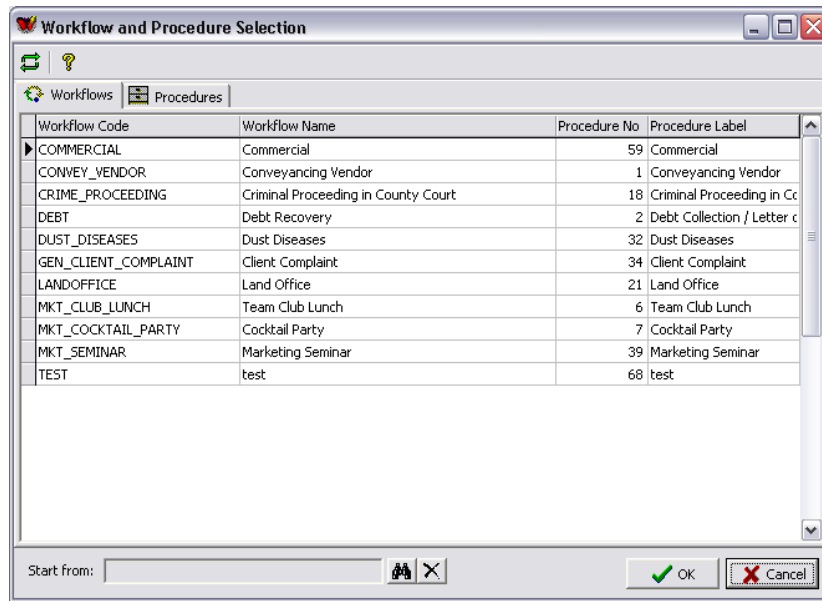
A workflow and a procedure are both a set of pre-defined tasks. A workflow is actually made up of one or more procedures. Sometimes a set of tasks will be contained only within a specific workflow, and sometimes that set of tasks will have been created as a procedure and then attached to the workflow. This gives more flexibility since a saved procedure can be included in a number of different workflows.

To attach a workflow or a procedure to a matter:

1. Open the matter and select the "Tasks" tab.
2. Select the **[Add]** button.



3. A list of all available workflows (first tab) and procedures (second tab) will display:



4. Select the procedure or workflow required and then click on **[OK]**.

The first group of tasks for the selected procedure or workflow will now display in the Task List on the matter, ready for actioning.



Hands on

1. Attach the "Review with Client" procedure (no. 23) to your debt recovery matter.
2. Attach the "Client Complaint" workflow to your debt recovery matter.

15.2.1 Displaying Tasks by Workflow Group

When you have more than one workflow or procedure attached to a matter, you may find it helpful to display only some of the tasks at any one time, or to display only the tasks belonging to a particular workflow or procedure. Use the "Tasks" drop-down list to display tasks according to the workflow or procedure to which they belong. This defaults to "All Tasks" but can be changed at any time.

The screenshot shows a software window titled "Matter: Consolidated Supplies Pty Ltd Debt Recovery from L A Peterson & Co 012426". The window contains a menu bar, a toolbar, and a main content area. The main content area is divided into several sections: "Matter" details, "Client" information, "Short Description", "Long Description", and "Your Reference". Below these sections is a toolbar with various icons. The "Tasks" panel is open, showing a list of tasks with columns for State, Activity, Due Date, Start Date, Finish/Skip Date, and Description. A red hand icon points to the "Tasks" dropdown menu.

State	Activity	Due Date	Start Date	Finish/Skip Date	Description
	Notification of new file	2/09/2008			Notification of new file
	Send Demand Letter 1 (Inc F	3/09/2008	2/09/2008	2/09/2008	Send Demand Letter 1 (Inc F
	Has Debt Been Received	2/09/2008	2/09/2008	2/09/2008	Has Debt Been Received
	Advise client debt not receive	2/09/2008	2/09/2008	2/09/2008	Advise client debt not receive
	Send Demand Letter 2 (Inc F	5/09/2008	2/09/2008		Send Demand Letter 2 (Inc F
	Has debt been received	16/09/2008			Has debt been received
	Proceed or not	3/09/2008			Proceed or not
	Complaint received - all detail	2/09/2008			Complaint received - all detail



Hands on

1. Open your debt recovery matter and display the Tasks.
2. Display only the tasks belonging to the procedure "Review with Client".
3. Display only the tasks that belong to the "Client Complaint" workflow.
4. Display only the tasks that belong to the "Debt Recovery" (DEBT) workflow.
5. Display all tasks.

15.3 Customising Column Display

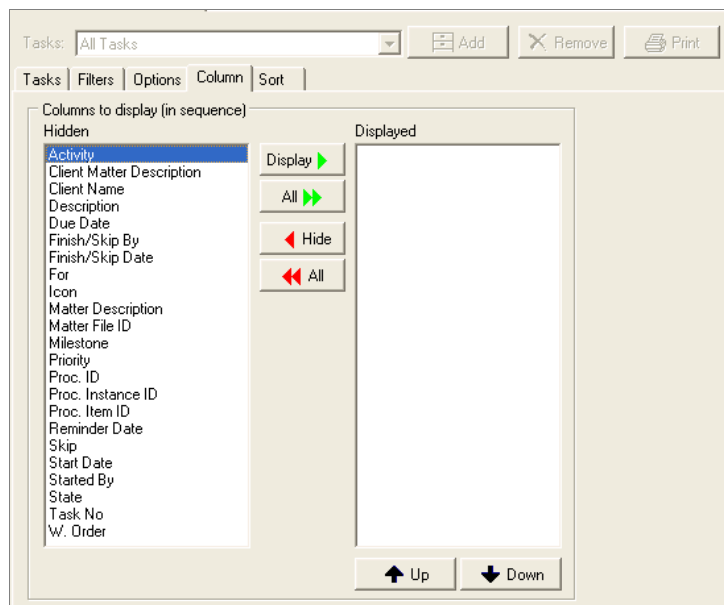
The "Column" tab in the task window enables you to determine which columns of information you want to see when displaying a list of tasks. The procedure for customising the column display is the same whether you are customising columns in the matter window, the Task List program, or the Diary.

You may have different column layouts in each area of Lexis Affinity Library. This will allow you to select the column layout that is most suitable for the area you are working in. For example, you will probably want to display the matter number in the Diary window, but this would not be necessary in the matter window.



Procedure





1. In the "Tasks" window on the matter, select the "Column" tab. The following window will display:



1. From the column headings listed in the "Hidden" column, select the columns to be displayed by selecting the column name and then clicking on the **[Display]** button. This will move the column name from "Hidden" into "Displayed".
To select all columns, simply select the **[All]** button.
2. Remove columns by selecting the column name in the 'Displayed' column and then click on the **[Hide]** button.
3. Change the order of displayed columns by selecting the column name and then clicking on the **[Up]** or **[Down]** buttons to position the columns in your preferred order.

NOTE: You can select several columns names at a time using <Ctrl> + left mouse click or <Shift> + left mouse click to select a group of column names.

15.3.1 Column Headings

Activity	Identifies the type of task (eg. email, document, decision point).
Category Code	ID or code applied to the task category (if a category has been assigned).
Category Description	Description of the task category (if a category has been assigned).
Client Matter Description	A combined field of client name and matter description
Client Name	This is the Name field from the Client record.
Description	Details of the task to be carried out.
DISABLESKIP	Indicates whether this task has the "Disable Skip" flag applied.
Due Date	The date when the task is due.
Finished/Skip By	The initials of the person who skipped the task.
Finished/Skip Date	The date the task was either finished or skipped.
For	Identifies the person (or role) allocated to perform the task.
Icon	Icons indicate the type of activity to be performed. For example: <ul style="list-style-type: none">  Document Production  Email  Telephone Call  Decision Point
Matter Description	Description entered at matter opening
Matter File Id	Matter number
Milestone	Use this field to flag a task as a milestone. This field may be used to filter tasks (ie. show all tasks that are milestones).
Priority	Indicates the importance of the task.
Proc ID	The procedure ID which is a number allocated to procedure.
Proc. Instance ID	Refers to the name of the workflow.
Proc Item ID	Number allocated to task.
Reminder Date	Date of reminder
Skip	Y/N Indicates whether a task has been skipped or not.

Source Procedure Code

The ID or code assigned to the source procedure.

Source Procedure Label

Description of the source procedure.

Start Date






The date the task commenced.

Started By

Person or role who started task

State

Indicates the status of the task.

	Started	Task has been started
	Finished	Task has been completed
	Not started	Action needs to be taken
	Skipped	Task has been skipped
	Past Due	Task is past its due date

Task No

This is unique identifier and is used to determine the sequence in which tasks were added to a matter. This should not be confused with the order of processing tasks.

W. Order

The number in this column relates to the order of the task in the workflow it belongs to. As a matter may have multiple workflows attached, each workflow has its own numbering sequence. If the task is not a workflow task, this column will be blank.

15.3.2 Sorting Columns

You can alter the order of the columns using the “Sort” tab.



Procedure

1. Display the Tasks window on a matter and select the “Sort” tab.
2. In the “Available” column, select the columns that you want to be used when sorting entries.
3. Click on **[Add]** to move the column to the “Selected” column.

If a Column is already included, you can use **[Up]** and **[Down]** to rearrange the sort order. If more than one column is selected, the primary sort is by the first columns, the secondary sort is by the second column etc.

You can check the “Descending” check box to display the tasks in descending order.



Hands on

1. Open your debt recovery matter and display the task list.
2. Customise the column layout of tasks, displaying only the following columns in the order shown:

State
Icon
For
Activity
Description
Due Date
Priority
Proc Instance ID

3. Re-set the column display to the default layout



TIP: Use the [<< All] button to remove all column headings from the display list.

15.4 Filter

As in other areas of Lexis Affinity Library, a filter may be applied to the Task List to selectively display tasks.

In the Tasks window on the matter, select the "Filter" tab. The following screen will display.

The screenshot shows the 'Tasks' window for matter 012431. The 'Filters' tab is active, displaying a 'Load From' dropdown set to 'All Tasks' (circled in red). Below this are several filter sections: 'Select Equal to' with dropdowns for Employee, Workflow Supervisor, Priority, Role, Workflow, Category, and Client Master; 'Reminder Date' and 'Finish Date' sections with 'From Date' and 'To Date' pickers and checkboxes for 'Blank Reminder Date' and 'Blank Finish Date'; and 'Due Date' and 'Start Date' sections with similar pickers and checkboxes for 'Blank Due Date' and 'Blank Start Date'. A 'Default' button is at the bottom right.

15.4.1 Filter Equal To

Select Equal to - Employee

Select an employee from the drop-down list to display tasks for that employee only.

Select Equal to – Workflow Supervisor

Select an employee from the drop-down list to display tasks where that employee has been nominated as the Workflow Supervisor (note that a Workflow Supervisor is assigned to an entire workflow area, not to individual tasks within that workflow).

Select Equal to - Priority

Select a Priority from the drop-down list to select tasks for a particular Priority rating.

Select Equal to - Role

Select a Role from the drop-down list to select tasks for a particular Role.

Select Equal to - Workflow

Select a workflow from the drop-down list to select tasks belonging to a particular workflow.

Select Equal to - Category

Select a Category from the drop-down list to select tasks for a particular Category.

Select Equal to Tasks

Select the type of Task from the drop-down list to select tasks of a particular type

Milestone Only

Tick this to list only Tasks that are Milestones.

15.4.2 Filter by Date

A number of date options are available on the filter screen that enable tasks to be filtered by the reminder date, due date, finish date and start date.

From and To Dates:

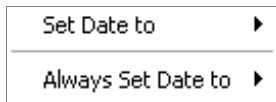
To filter by a date range, check the boxes beside "From" and "To" and then select the dates required. These may be entered via the keyboard, or by using the pull-down calendar.

Set Date Button:



The "Set Date" button is used to quickly populate the "From" and "To" boxes with a specific time period. For example, you may set the dates to display a date range for this week, last week, this month and so on.

When you click on the "Set Date" button, a drop-down menu with two items will display:



Set Date to: Setting the date using this option sets the date using the criteria selected for this report only.

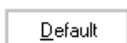
Always Set Date to: Setting the date using this option sets the date to the period selected and the date range is updated each time the report is generated. If this option is selected, it will be indicated on the Filter screen with the words "Always set to <period> date period".

For example if you want to produce a Task List of matters that were due for action in the last 7 day period, use the criteria "Always set date to – Last week".

Blank Date:

Check the blank date check box (eg. "Blank Start Date") to display only those Tasks where the date is blank. For example, checking "Blank Start Date" will return all Tasks that have not yet been started.

15.4.3 Clearing and Restoring the Filter Settings



Click on this button to restore the Filter defaults (all tasks due today but not finished for the current user).



Click on this button to clear all the Filter settings.

15.4.4 Saved Filter Settings

Commonly-used filter settings can be saved for re-use.



PROCEDURE

1. In the Tasks Filter, set the filter option as required.
2. Click on the **[Save As]** button at the top of the Filter window.

Matter: Consolidated Supplies' Pty Ltd Debt Recovery from L A Peterson & Sons 012431

File Search Help

Matter 012431 02 9589 7654 Partner MMC Michael Cavanagh Entity Lewisham Reid
 Client CSP001 Consolidated Supplies' Pty Ltd Controller AD Anthony Donnelly Branch Sydney - Lewisham Re
 Short Description Debt Recovery from L A Peterson & Sons Author YSR Yvette S Rogers Department Commercial
 Long Description Debt Recovery from L A Peterson & Sons Type DEBT Debt Recovery Matter Source Country
 Your Reference [Empty] Date Instructed 13/01/2010
 Date Completed [Empty] Archive

History Investments Debt Control Debtors Letters Trust Letters Safe Custody Unpresented Cheques Research
 Balances Contacts Data Bills Receipts W/Offs & Tfrs Graphs Diary Precedents Documents Team Tasks

Tasks: All Tasks [Add] [Remove] [Print]

Tasks Filters Options Column Sort

Load From [Dropdown] [Save As] [Save] [Delete] [Clear]

Private? Save settings on close?

Select Equal to

Employee [Dropdown]
 Workflow Supervisor [Dropdown]
 Priority All [Dropdown]
 Role [Dropdown]
 Workflow [Dropdown]
 Category [Dropdown]
 Tasks All Tasks [Dropdown]
 Milestone Only
 Client Master [Dropdown]
 Client Group [Dropdown]

Reminder Date
 From Date 13/01/2010 [Dropdown]
 To Date 13/01/2010 [Dropdown]
 Blank Reminder Date

Finish Date
 From Date 13/01/2010 [Dropdown]
 To Date 13/01/2010 [Dropdown]
 Blank Finish Date

Due Date
 From Date 13/01/2010 [Dropdown]
 To Date 13/01/2010 [Dropdown]
 Blank Due Date

Start Date
 From Date 13/01/2010 [Dropdown]
 To Date 13/01/2010 [Dropdown]
 Blank Start Date

[Default]

3. The following dialog box will display:

Input Form

Task List Filter save name:
 [Text Input Field]

Private?

[OK] [Cancel]

4. Enter a meaningful name for the filter (eg. Unfinished for this Week).
5. Tick the "Private" box. Private filters will only display for the person who creates them.
6. Select **[OK]**. This will save the filter and you will see the filter name in the "Load From" box.

The screenshot shows a software interface for managing filters. At the top, there are buttons for 'Add', 'Remove', and 'Print'. Below that, a 'Tasks' dropdown is set to 'All Tasks'. The main section is titled 'Filters' and contains a 'Load From' dropdown menu currently showing 'Unfinished for this week'. An arrow points to this dropdown. To the right of the dropdown are buttons for 'Save As', 'Save', 'Delete', and 'Clear'. Below these are checkboxes for 'Private?' (checked) and 'Save settings on close?'. The interface is divided into several sections for setting filter criteria: 'Select Equal to' with dropdowns for Employee, Workflow Supervisor, Priority (set to 'All'), Role, Workflow, Category, and Tasks (set to 'All Tasks'); 'Reminder Date' with 'From Date' and 'To Date' pickers (both set to 5/01/2007) and a 'Blank Reminder Date' checkbox; 'Due Date' with similar pickers and a 'Blank Due Date' checkbox; 'Finish Date' with 'From Date' (1/12/2006) and 'To Date' (5/01/2007) pickers and a 'Blank Finish Date' checkbox; and 'Start Date' with 'From Date' and 'To Date' pickers (both 5/01/2007) and a 'Blank Start Date' checkbox. A 'Default' button is located at the bottom right.

15.4.5 Changing a Saved Filter

If you need to modify a saved filter:

1. Display the filter by selecting the filter name from the drop-list in the "Load From" box.
2. Change the filter settings as required.
3. Click on the **[Save]** button.

This will re-save the filter with the new settings.

15.4.6 Deleting a Saved Filter

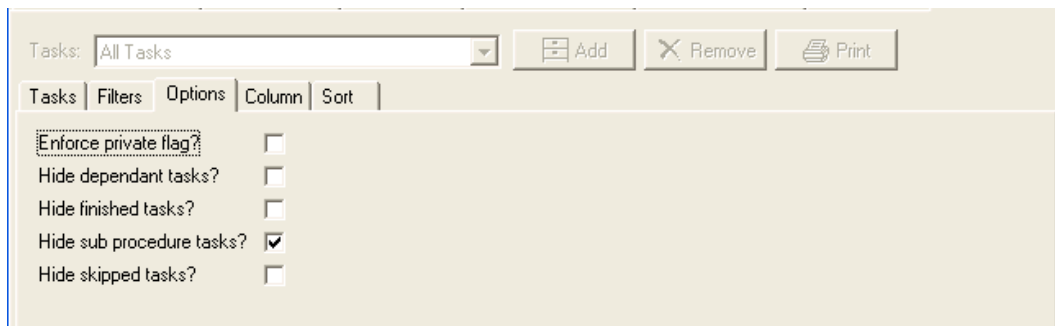
To delete a saved filter:

1. Display the filter by selecting the filter name from the drop-list in the "Load From" box.
2. Click on the **[Delete]** button.

The selected filter will be deleted from the list.

15.4.7 “Options” Tab

The “Options” tab in the matter task window provides additional options for determining which tasks to display in the task list.



The options are:

- Enforce private flag?

If this option is checked, the task list will not display any tasks that other users have flagged as “Private”.

- Hide dependent tasks?

This is legacy option, relevant only for firms using earlier versions of Lexis Affinity Library.

- Hide finished tasks?

If this option is checked, the task list will not display any tasks that have been finished.

- Hide sub-procedure tasks?

If this option is checked, that task list will not display any sub-procedure tasks. The tasks that form part of the sub-procedure will continue to display, but the task that calls the sub-procedure (which does not require any action by the user) will be hidden.

- Hide skipped tasks?

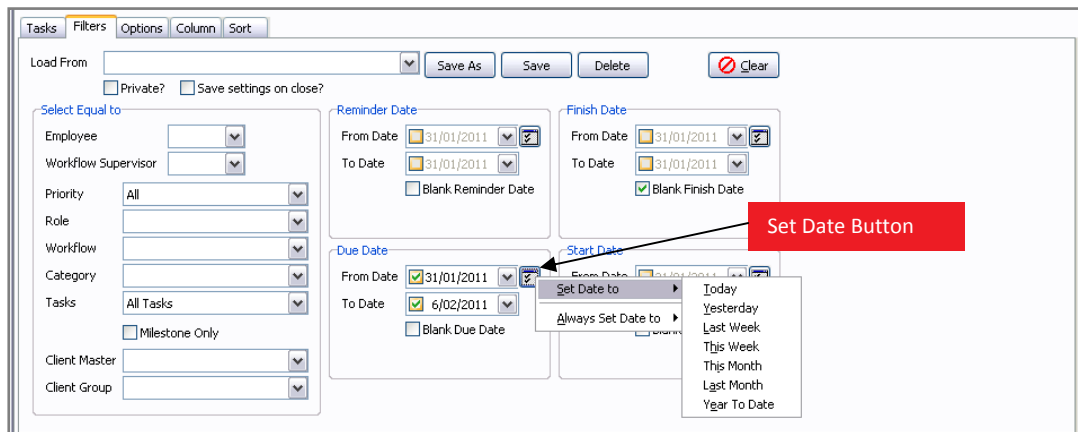
If this option is checked, the task list will not display any tasks that have been skipped. This is useful where many tasks have been skipped, and you only wish to see those tasks that have been or will be performed.



Hands on

In the exercise you will create and save two filter settings:

1. Open your debt recovery matter and display the “Tasks” tab.
2. Select “Filters”.
3. The first filter will be for unfinished tasks on this matter that are due to be done this week. In the “Due Date” area, click on the “Set Date” box and choose “This Week”.



4. Check the “Blank Finish Date” button.
5. Click on the **Save As** button. The following dialog will display:

6. Insert the name “Unfinished Tasks this Week”.
7. Check the box beside “Private?”. This will save the filter for the current user only. Leaving this box unchecked will make this filter available to all users.
8. Click on **[OK]**. The filter is now saved and you will be able to select it in the “Load From” drop-down list.
9. Create and save a filter to display all tasks due but not finished this month for the current user. (You should consider whether this should be a private filter and save the filter accordingly.)

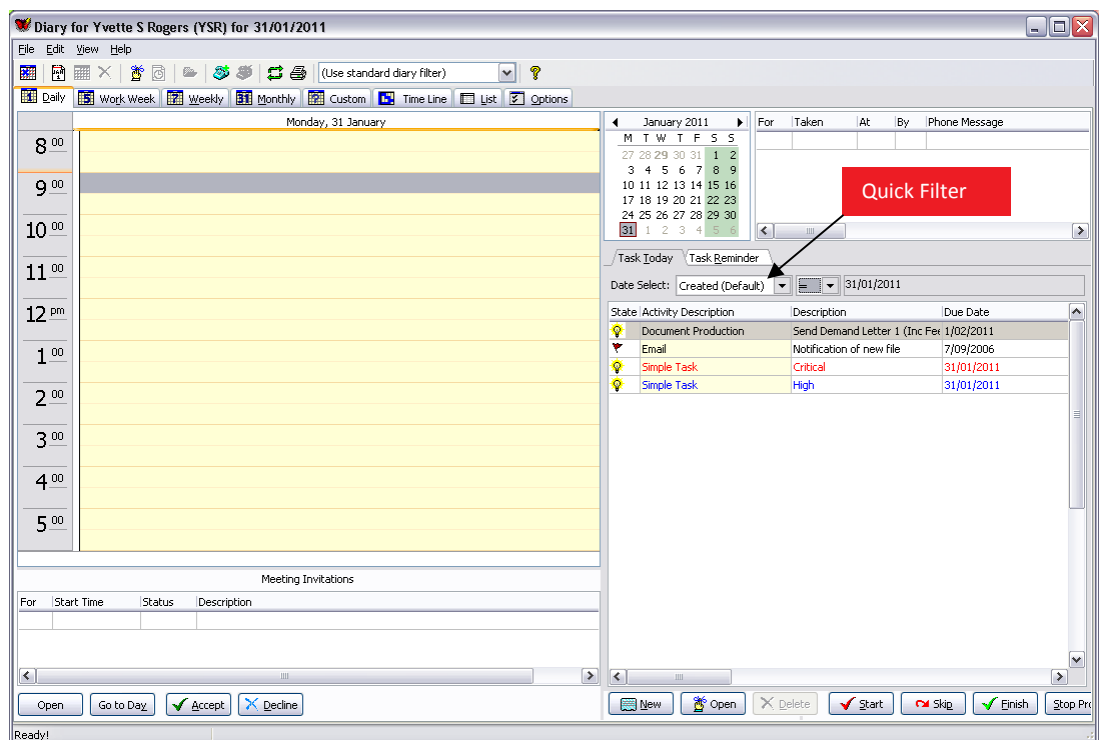
15.5 Viewing Tasks from Diary

Tasks may be viewed and actioned from the Daily view in Diary. Before applying any filters, the tasks displayed will be for the current user only and will show tasks across all matters for the current date. This is a useful way to see what tasks you have to perform across all matters for today.



Procedure

1. Open Diary.
2. Select the "Daily" tab to display the daily diary view.



3. By default, the Diary opens on today's date. The Daily view displays tasks, appointments, telephone messages and meeting invitations.

Task Today and Task Reminder

Tasks can be displayed in either the "Task Today" list or the "Task Reminder" list. The "Task Today" list is displayed by default.

"Task Today" displays all tasks that match the quick filter criteria (see screen layout above). In the example above, the quick filter is set to show tasks where the finish date is greater than or equal to 31/07/2006. Users can change this quick filter to show due, started, finished and created dates, and can also change the date and date comparison operator. See below under 15.5.2 Filtering Tasks in the Daily View for further details.

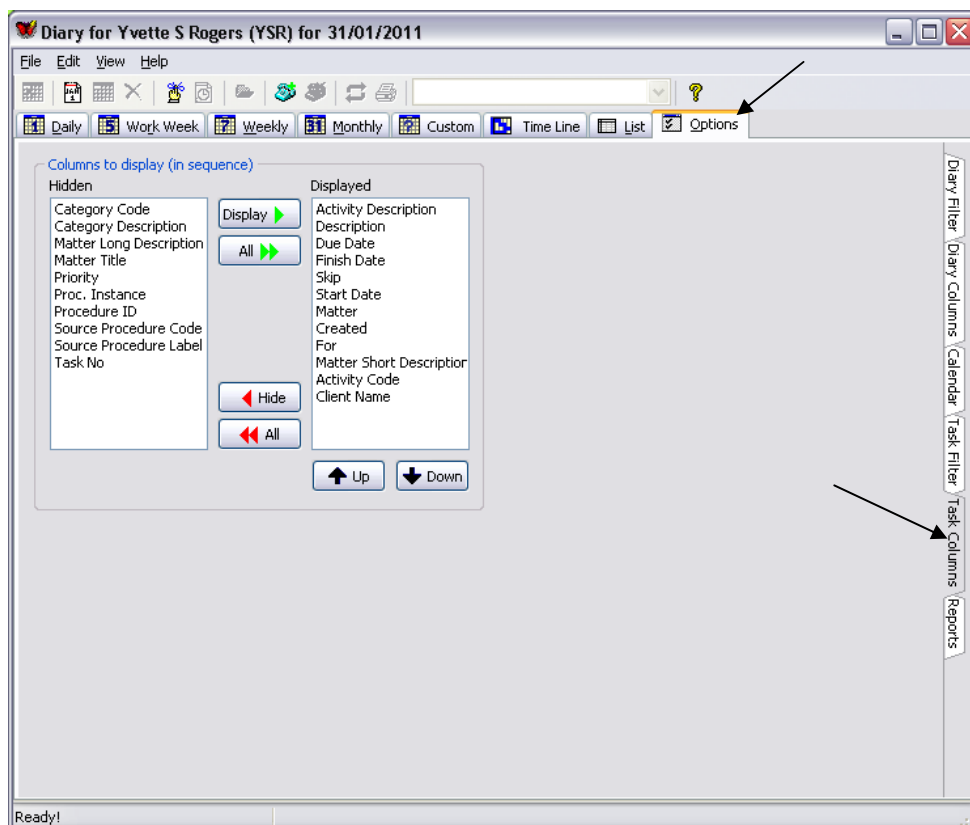
“Task Reminder” does not use the quick filter. It simply displays all tasks for the selected employee(s). (This is generally the user currently logged into Lexis Affinity Library but is determined by the employees selected in the Diary Filter.)


15.5.1 Column Layout

The column layout can be modified in the Diary window in the same way as it is modified in the matter window. You will see that some additional columns are available in the Diary view such as matter title, matter short description and matter long description. (These columns are not available in the matter window). You will probably want to include the matter number and/or client name in the column layout as the task list shows tasks due across all matters and you need to be able to quickly identify the matter a task belongs to.

To modify the column layout of the task list in Diary:



1. From the “Daily” view, select the “Options” tab.
2. Select the “Task Columns” tab (found on the tabs listed down the right-hand side of the window).



3. Select the columns required, and click on the  button to place them in the “Displayed” column.



TIP: You can use <Ctrl>+ left mouse click to select multiple columns at a time.

4. Use the  and  buttons to order the columns as required.
5. Click on the “Daily” tab to view the results.

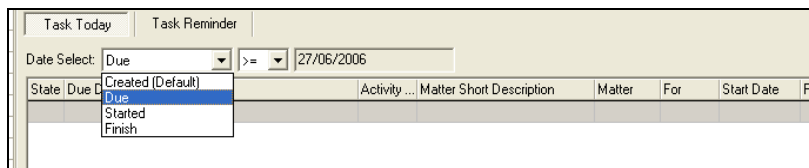
15.5.2 Filtering Tasks in the Daily View

There are two ways to filter tasks in Diary.

- Using the “Date Select” quick filter.
- Using the “Task Filter” tab under “Options”.

Date Select Quick Filter

This option enables the user to filter tasks based on a the created date, due date, started date or finished date.



Created Date the task was created or entered into the Task list

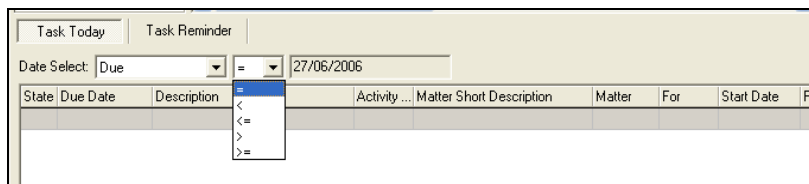
Due Date the task is actually due on

Started Date the task was started (Task may or may not yet be completed)

Finish Date the task was finished (ie completed)

Task Filter Comparisons

Use a comparison operator to set the date range to display:



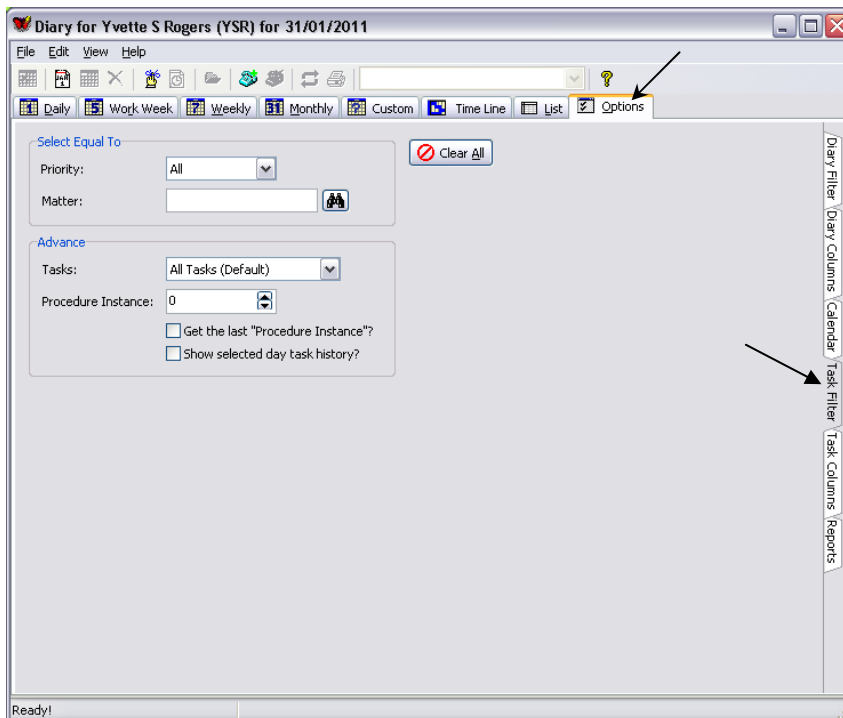
= Equal to the date displayed

< Less than the date displayed

- <= Less than or equal to the date displayed
- > Greater than the displayed date
- >= Greater than or equal to the displayed date


Task Filter

This option allows the user to select which tasks are to be reported on the Task area of the Daily Diary. The filter screen is displayed below:



Priority The priority set on the task. Select from:

All
Normal
High
Critical

Matter Enter the matter number or click on  to display the matter selection window.

Tasks Select the type of task to display: Select from:

All tasks
All Custom Tasks
All Procedure Tasks
All Workflow Tasks

Proc Instance You can select a particular instance from the procedures that are attached to a matter

Get the Last "Procedure Instance"?

Check this box to show only the last instance of a procedure. (This is useful where a procedure has been added to a matter multiple times but you only want to see the most recent instance.)

Show selected day task history

Check this box to include finished tasks for the selected day. If the box is unchecked, finished tasks will be hidden.

15.6 Task List

The Task List program (found under the Case Management group) displays all tasks for all users across all matters. Filters can be applied to this list to enable firm-wide reporting of various types of activities (eg. settlements, court appearances, seminars). The task list can also be printed from this program.



Procedure

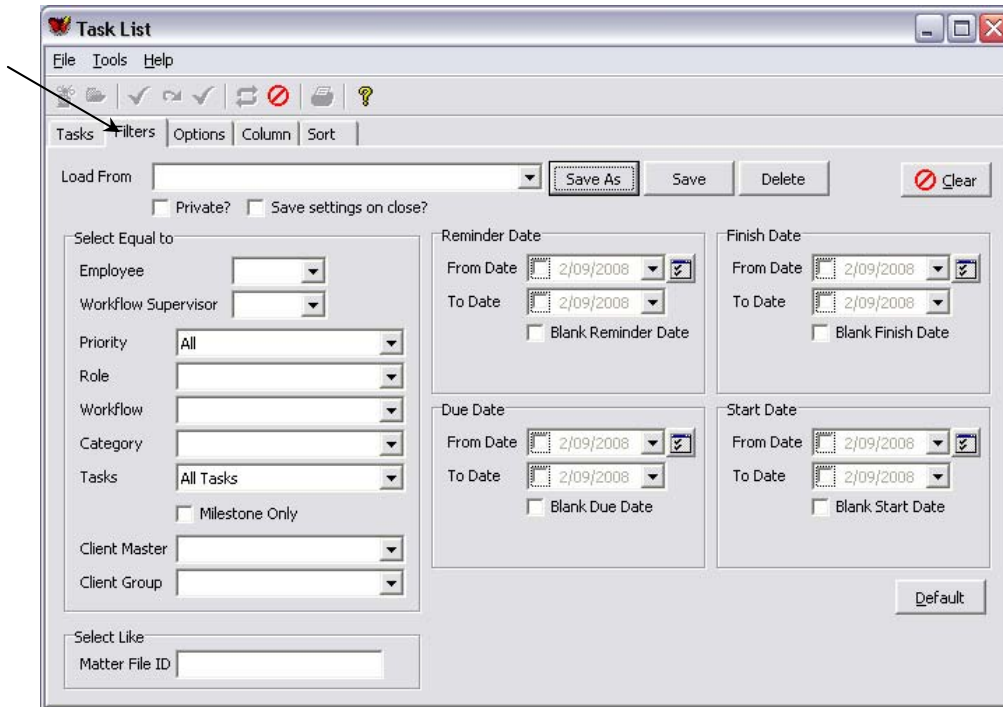
1. To view tasks, select Case Management | Workflow & Tasks | Task List.

State	Due Date	Icon	Description	Client Name	Matter Description	Priority
			Send letter (or Fax) to agent c	Gribble, Mr John	Sale to Thompson	Normal
			Phone client and agent to conf	Consolidated Supplies Pty Ltd	Sale to Birrell	Normal
	25/09/2008		Attend Seminar	Lewisham Reid - Melbourne	Grassroots Campaign 2007	Normal
✓	6/06/2008		Follow up on client complaint	Fauldings Pty Ltd	Dust Disease - James Hardie -v-	Critical
✓	6/06/2008		Follow up on client complaint	Fauldings Pty Ltd	Dust Disease - James Hardie -v-	Critical
✓	14/06/2005		Letter of Demand	Department of Consumer Affai	Debt from JM Smith	Normal
✓	14/06/2005		Debt Unrecovered	Department of Consumer Affai	Debt from JM Smith	Normal
✓	14/06/2005		2nd Letter of Demand	Department of Consumer Affai	Debt from JM Smith	Normal
✓	14/06/2005		Debt Recovered	Department of Consumer Affai	Debt from JM Smith	Normal
✓	14/06/2005		Has debt been recovered	Department of Consumer Affai	Debt from JM Smith	Normal
✓	14/06/2005		2nd Letter of Demand	Department of Consumer Affai	Debt from JM Smith	Normal
✓	22/12/2006		Send email to client advising de	Black Day Publishing Pty Ltd	Debt Recovery from Regents F	Normal
✓	24/12/2006		Send Final Letter of Demand (I	Black Day Publishing Pty Ltd	Debt Recovery from Regents F	Normal
✓	10/01/2007		Has debt been recovered	Black Day Publishing Pty Ltd	Debt Recovery from Regents F	Normal
	6/12/2006		Advise client debt not receiv	Black Day Publishing Pty Ltd	Debt Recovery from Regents F	High
	29/12/2006		Advise client debt not receiv	Consolidated Supplies Pty Ltd	Recovery from Kelly	High
	1/09/2008		Advise client debt not receiv	Consolidated Supplies Pty Ltd	Dust Disease - James Hardie-v-	High
	12/12/2006		Advise client debt not receiv	Department of Consumer Affai	Recovery from Fauldings	High
✓	3/07/2005		Letter of Demand	Black Day Publishing Pty Ltd	Debt from Gemini Ski Hire	Normal

2. As this Task List shows all tasks for the firm, you will need to use a filter to display a more useable list of tasks.

15.6.1 Filter on Task List

The filter window in the Task List program is very similar to the filter found in the matter window. There is one additional field for filtering, which is the “Matter File ID” field. This allows you to filter the task list by matter.



Hands on

In this exercise you will display a task list for outstanding tasks that were due this month and have no Start or Finish date recorded.

1. In the “Due Date” area, select the “Set Date” button and then select “This Month” from the drop-down menu.

The dates will be completed automatically.

2. Check the box beside “Blank Finish Date”.
3. Check the box beside “Blank Start Date”.
4. Click on the “Tasks” tab and view the list of tasks generated.
5. Return to the filter window and save the current filter as “Uncompleted Tasks for current month”.


15.7 Custom Tasks

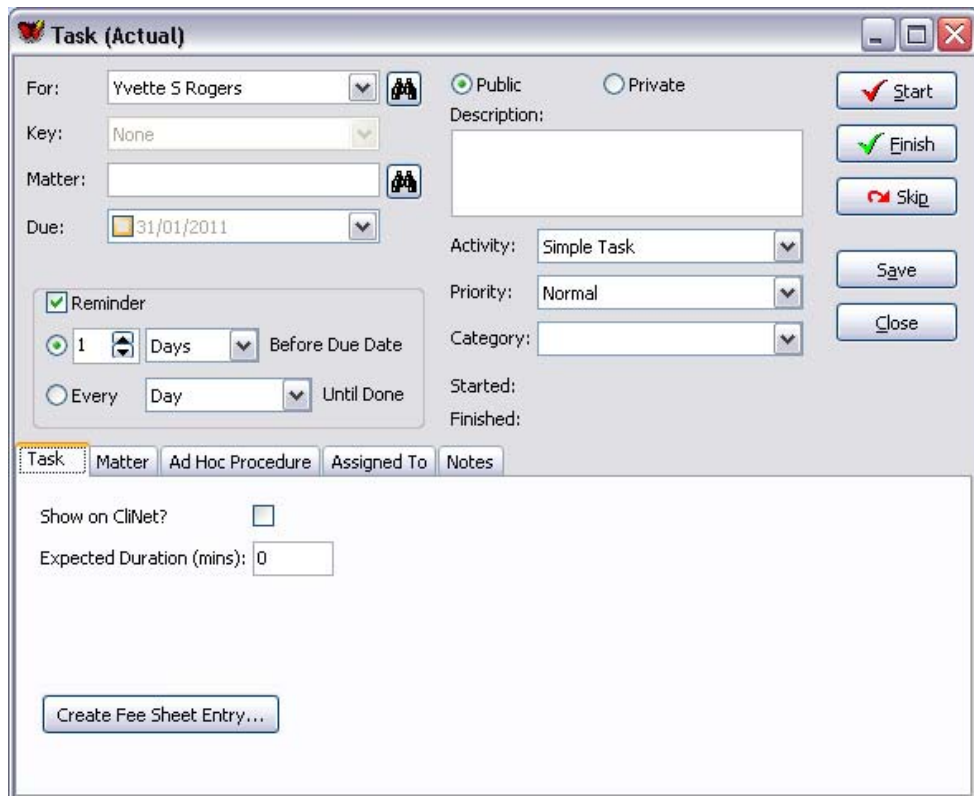
Sometimes you will need to be record a single task that needs to be performed which is not standard to a matter and therefore not included in a workflow. These ad-hoc tasks are referred to as Custom Tasks. Custom Tasks may be created from the matter window, the Diary, or the Task List window.

15.7.1 From Diary



Procedure

1. Open Diary and ensure the Daily view is displayed.
2. Click on the  button (in the Task pane) to create a new task. This will open the "Task (Actual)" dialog box.



3. In the "For" box, select the person or role for whom the task is being created. This will default to the current user.
4. Enter the matter number that this task relates to (if applicable).
5. Select the due date for the task (if applicable). The default is today.
6. If you would like a pop-up reminder for this task, ensure the reminder box is checked. You may then choose to be reminded a specified number of days prior to the due date of the task, or to be reminded every day until this task is done.

7. Select either "Public" or "Private". If the task is to be viewed by all users select Public.
If the Task is not to be viewed by all users or is a personal entry select Private.
8. In the "Description" box, enter an explanation of what the task is and what actions need to be taken.
9. Select the type of activity this task relates to (eg. email, telephone call).
10. Select a priority for the task – Normal, High or Critical.
11. Optionally, you may select a Category for this task. Task categories are usually created by your system administrator and are used for reporting purposes.


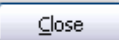
For example, your firm may have a task category for "Settlement Date" to enable a task filter to be applied showing all settlements that are scheduled to take place in a given period.

12. In the "Task" tab in the lower part of the window, enter an expected duration for this task, in minutes. This is optional but is useful to show other staff members how busy you are with tasks when they attempt to schedule you into meetings.

You may also create a fee sheet entry for this task by clicking on the

 button.

This will open a "Fee Sheet Entry" dialog box.

13. Once all the above details have been entered, selected  and then . This task will now display in the Task Reminder list for the person it was created for and is ready to be actioned.

15.8 Task Reminders

Task Reminders are used to remind or alert the employee(s) who is/are to perform the task that there is a task to be performed.

Task Reminders will automatically appear on the Affinity Desktop or can be invoked manually at any time.

When a Task Reminder is displayed (either automatically or manually) the relevant matter number, activity, description, due date and priority status will display. The priority is also shown by a coloured band at the bottom of the task reminder.

Reminders will continue to display until a Task has been flagged as "Finished" or as "Don't Remind Me Again".

Task Reminder Dialog Box



If you select “Don’t Remind Me Again” the dialog box will change to allow you to either open, start or finish the task.

If “Open” is checked the task screen will open, allowing you to start, finish or skip the task.

15.8.1 Checking for Task Reminders Manually

To check your task reminders:



Procedure

1. From the Lexis Affinity Library menu bar, select File | Check for Task Reminders.

Your reminders will display. The number of reminders that will display at one time depends on what options you have selected (see below).

You may action the task via the reminder dialog or simply close the reminder dialog.

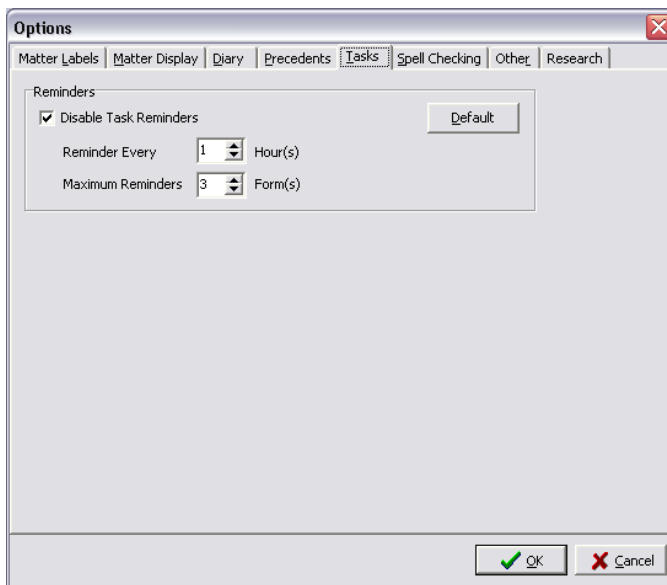
2. Close the reminder dialogs by clicking on
3. Repeat the above steps to view additional task reminders.

15.8.2 Options for Task Reminders

The **Options** window contains settings for the behaviour of task reminders.

To open the Options window, select Utilities | User Options.





These options allow you to set the time interval for task reminders and control the number of reminders that will pop up at one time. You may also disable pop-up task reminders.

NOTE: Your system administrator can also set task options at a system level which may or may not override the options you set yourself. Please refer to your system administrator for further information on how your system has been set up.

16. LexisNexis Research Services

If you subscribe to LexisNexis AU or LexisNexis NZ, you can access online research from within Lexis Affinity Library.

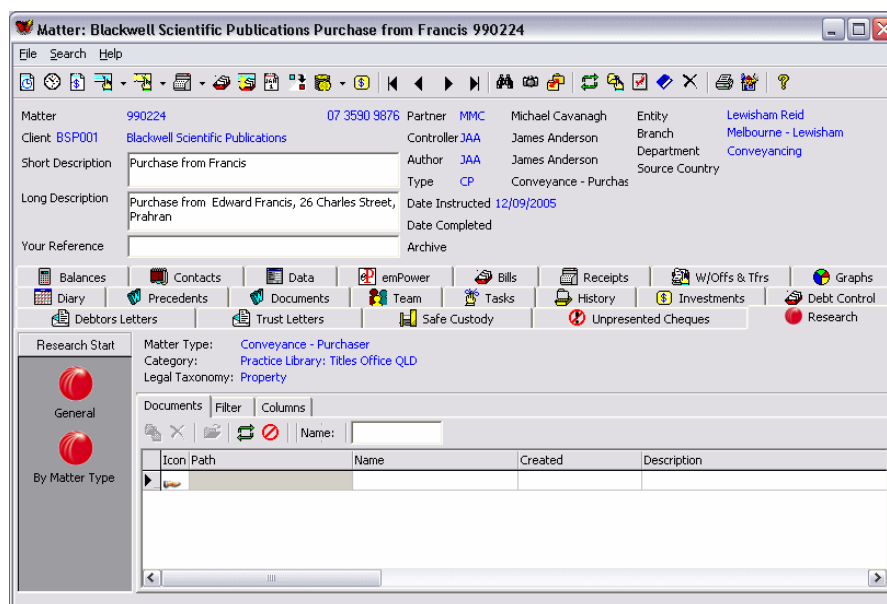
This chapter describes how to access online research from inside Lexis Affinity, save research links back to matters and record time spent doing research. It is not intended to provide information on the functionality of LexisNexis AU or LexisNexis NZ.

16.1 Launch Research from Matters



Hands On

1. Open matter **990224**.
2. Select the “Research” tab.



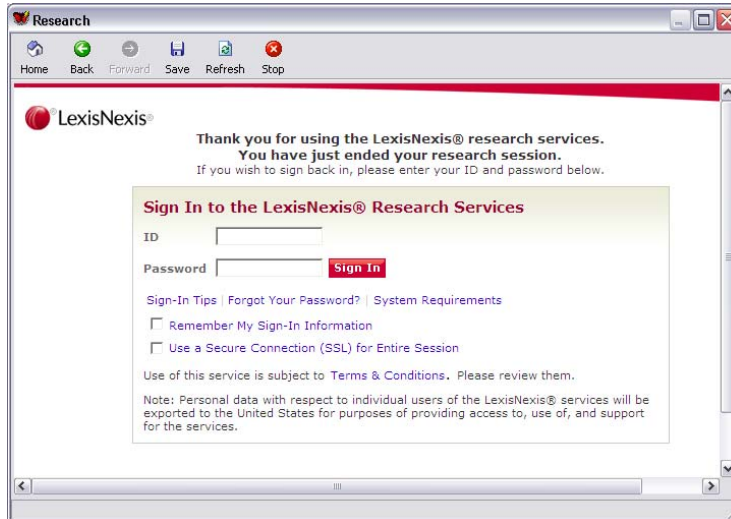
3. There are two research icons listed in the left side panel.

General: launches the LexisNexis research web site for a search across all subscribed sources. Your default home page will display.

By Matter Type: launches the LexisNexis research web site with only selected sources loaded. You will be prompted to enter your search terms before the web page is launched. You will be taken straight to a results list.

General Research

4. Select "General". You will be prompted to sign in to LexisNexis Research Services.



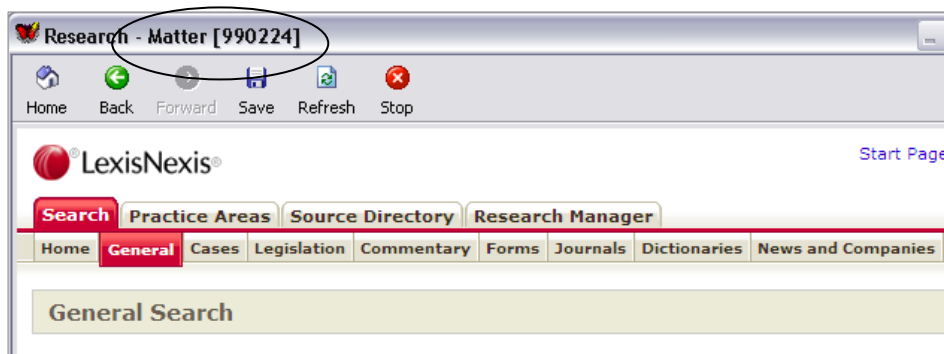
5. Enter your user name and password and then click **Sign In**.



TIP: If you tick "Remember My Sign-In Information", this window will not display again.

Your default page will display.

Note that this page is part of a special Lexis Affinity Library window which has its own toolbar. You will also see that the matter number is displayed in the title bar.



6. Enter your search criteria as usual and display the results.
7. Close the research window to return to the matter window.

By Matter Type

Matter Types can be customised by applying selected research sources. For example, Intellectual Property matters can be setup to select only Intellectual Property sources on LexisNexis AU or LexisNexis NZ.

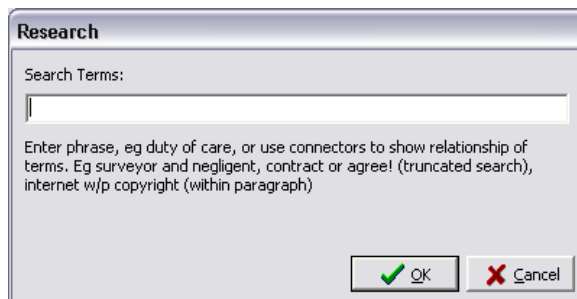
Matter Types are customised by your System Administrator to suit your firm's requirements. If a particular Matter Type has not been customised for research, you will only see the "General" icon under the Research tab. Where a research customisation has been applied, a "By Matter Type" icon will also display.



Hands On

1. Open matter **990224**.
2. Select the "Research" tab.
3. Click on the "By Matter Type" button in the left side panel.

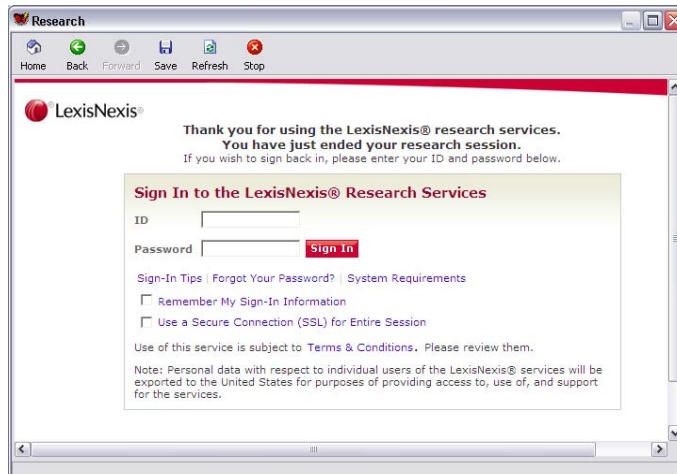
The following dialog box will display:



4. Enter your search terms and then click [OK].

For example, enter "notice to complete".

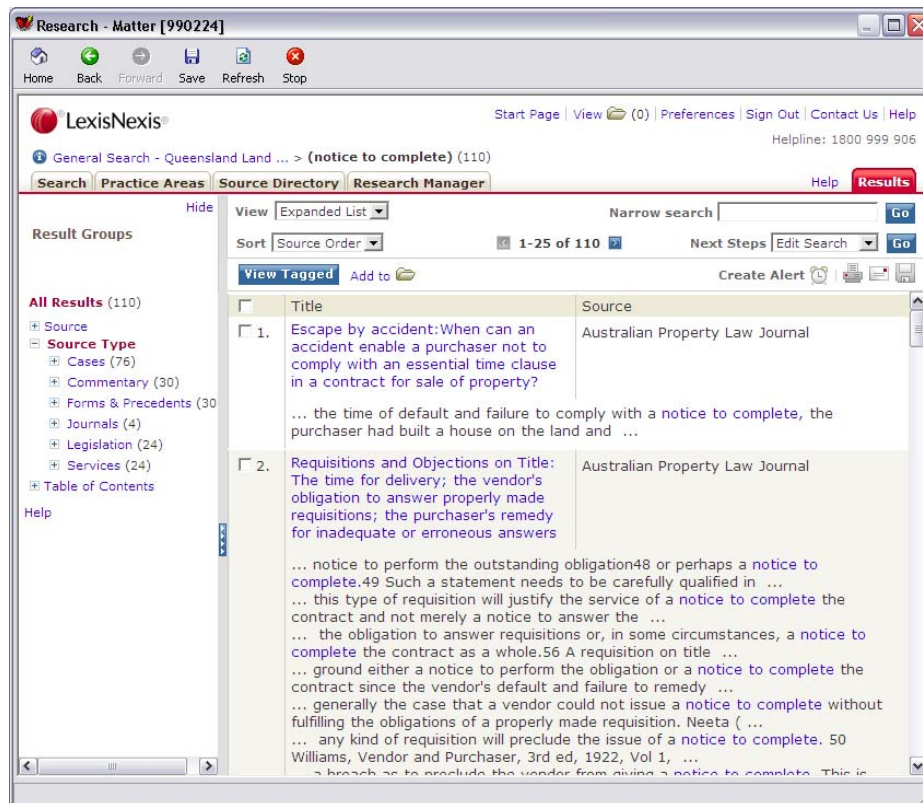
The Sign In dialog will display.





TIP: If you tick "Remember My Sign-In Information", this window will not display again.

5. The next screen to display will be the results list. For example:



6. Browse your results, and then select Sign Out. You will be returned to the matter window in Lexis Affinity Library.

16.2 Fee Sheet Entries

You can automatically record Fee Sheet entries in Lexis Affinity Library for time spent doing research. When you enable automatic time recording in Lexis Affinity Library the Fee Sheet timer starts as soon as research is launched. The timer stops as soon as the research window is closed.

16.2.1 Setting up Options for Fee Sheet

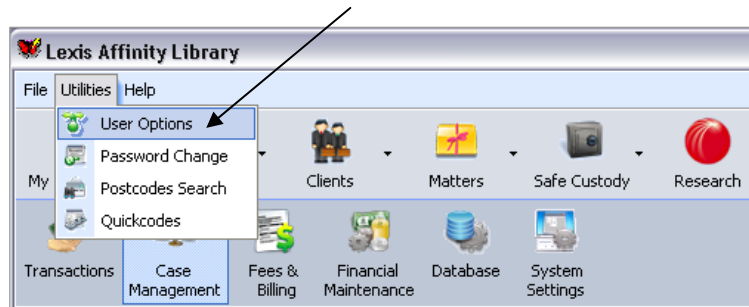
You can set default options for creation of Fee Sheet entries when performing online research.



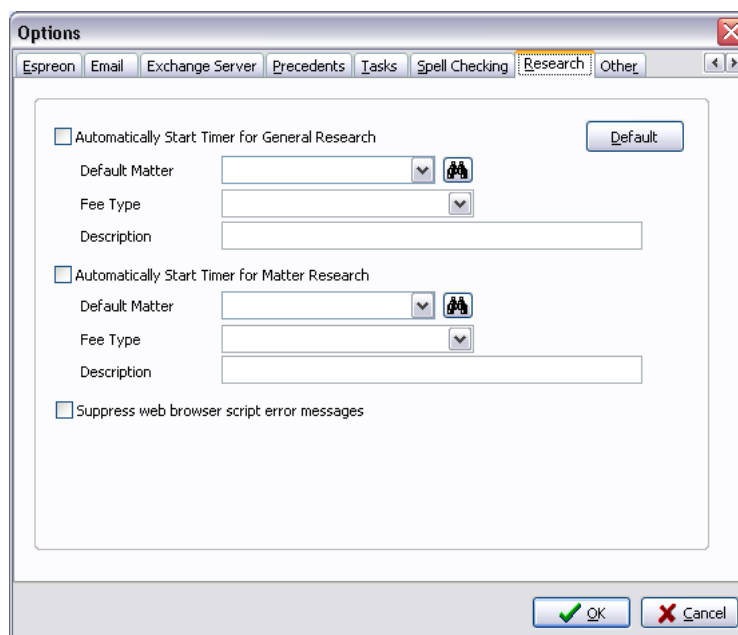
Procedure

To apply research settings at the user level:

1. From the menu, select Utilities | User Options.



2. Select the “Research” tab.



3. You can activate the timer for general research and/or matter research.

You can then enter a default matter number, default fee type and default description for the Fee Sheet entry.

General

This refers to research launched from the Global Navigation Toolbar (ie. not from a matter window).

Under Default Matter, select from the following:

[USE SEARCH] to display the Matter Search window and allow the user to select any matter before the Research window opens.

[NO DEFAULT] to not default the Fee Sheet entry to any matter number. In this case, the user will need to enter a matter number into the Fee Sheet on completion of the research.



to select a particular matter against which all general research will be recorded (eg. your personal administration matter number).

Matter Research

[MATTER] to always use the current matter (ie. matter on which research was launched).



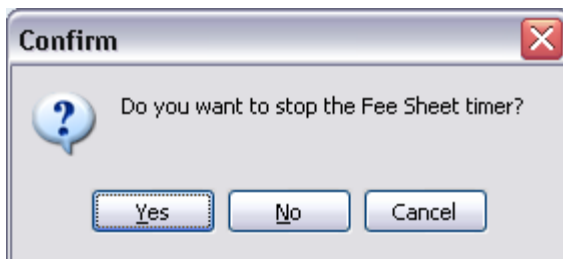
to select a particular matter against which all matter research will be recorded.

Note that the matter and fee type selected may cause a chargeable fee sheet entry to be created for a matter, and this will become a Fee on the matter when submitted. Choose matter numbers and fee types carefully if you do not wish fees for research to be created on clients' invoices.



IMPORTANT

Research launched from a workflow task can be set up to launch using your default browser rather than the Affinity browser. If you are automatically recording time while performing research, note that the Fee Sheet timer will not stop when you close an external browser window. You must stop the timer manually after closing your browser window. If using the Affinity browser, the Fee Sheet timer will stop if you answer Yes to the following prompt:



If you answer No to this prompt, the timer will continue and you will need to go to the Fee Sheet and stop it manually.



Hands On

In this exercise you will set up Fee Sheet defaults for research.

1. From the menu, select Utilities | User Options.
2. Select the “Research” tab.
3. *Automatically Start Timer for General Research:* tick this box.
4. *Default Matter:* select the administration matter for the user you are logged in under.
5. *Fee Type:* Non Chargeable
6. *Description:* General Research
7. *Automatically Start Timer for Matter Research:* tick this box.
8. *Default Matter:* [MATTER]



TIP: This selects the matter number from which you launched research.

9. *Fee Type:* Research
10. *Description:* Conduct Research
11. Select [OK].

16.3 Save Research Links

Links to individual documents found on LexisNexis AU or LexisNexis NZ can be saved into Lexis Affinity Library. These saved links are stored in the Document Management system, however note that you are not saving the actual document onto your file system. You are saving a link to the document on the research web site.

If you discontinue your subscription for research services, you will not be able to activate these links.



Hands On

1. Open matter **990224** and select the “Research” tab.
2. Select *By Matter Type*.

3. *Search Terms:* drainage easement
4. Display the first document in the results list.
5. Select the save button from the top toolbar.



6. The following dialog box will display:

 A screenshot of a "Save Research Link" dialog box. The dialog has the following fields and options:

- Path: Research/267703,7TPR-SNF0-Y91J-R36H
- File Name: (empty)
- Matter: 990224
- Phonebook: Blackwell Scientific Publications
- Description: WORIMI LOCAL ABORIGINAL LAND COUNCIL v MINISTER FOR LANDS FOR NEW SOUTH WALES (No 2) -
- Created: 12/01/2010
- Mailed: 12/01/2010
- Author: James Anderson
- Operator: Yvette S Rogers
- Show on CLiNet:
- From/Sender: (empty)
- Precedent: (empty)
- Category: (empty)
- Department: Conveyancing
- Branch: Melbourne - Lewisham Reid
- Type(s): A grid of checkboxes including Agreement, Artwork, Brochure, Conflict Check, Debt Collection, Email, Facsimile, Financial A/cs, Forms, Invoice, LSA Statement, Letter, Medical Reports, Online Search, and PDF.

7. Select **[OK]**.
8. Close the Research window.
The Fee Sheet will display in Lexis Affinity Library.
9. Submit the current entry and close the Fee Sheet.
10. You should now see a saved research link in the matter window.
11. Double-click on the link to re-display the document, then close the document.
12. Select the "Balances" tab and display WIP. You should see an entry for the research you conducted. This is because a chargeable matter and fee type were entered in your research defaults.

16.4 Launching Research from a Workflow Task

If you use workflows, tasks may be set up to trigger the launch of LexisNexis AU or another URL. Where another URL/web page is launched, the Save function will save a link to that URL.

Note that a LexisNexis Practice Guidance page cannot be saved using the Affinity browser Save button. When Practical Guidance is launched in the Affinity browser you will not see a Save button on the toolbar.

16.5 Display all Research Links

A list of all saved links to documents on LexisNexis AU or LexisNexis NZ can be viewed in the Document Management program.



Hands On

1. Open Document Management (in the Case Management group).
2. Clear the filter and then select the “Filter” tab.
3. Tick Research under Types.
4. Display the results. All saved research links will display.



TIP: Remember to insert accurate descriptions when saving research links, as these can be used to further filter results.

Notes

17. On-line Searches via Espreon

On-line searches such as title searches, property enquiries and company searches can be performed from the matter window in Lexis Affinity Library. The service provider is Espreon (SAI Global). To use this feature, your firm must be licensed for the Espreon Integration module, and you must have an account with Espreon. You will continue to be billed by Espreon in the usual way.

There are two methods for performing searches:

1. Using the Espreon B2B Gateway. This allows you to perform the most common types of searches (eg. title search, owner search) and have the search results and charges captured back to the Affinity matter (immediately in many instances).
2. Using the Espreon Web Site. This allows you to launch the Espreon web site from inside Lexis Affinity. This gives you access to all the searches available from Espreon. You can save the results and the costs back to the matter. Costs are returned as part of an overnight process.

NOTE: If using the Espreon web site, it must be launched from inside Lexis Affinity. If you launch Espreon from the desktop, it will not be integrated with Lexis Affinity.

17.1 Searches via the B2B Gateway

The B2B Gateway method provides a quick data entry point from inside Lexis Affinity and in many instances, allows costs to be captured on the matter immediately.

The searches available using this method are:

ASIC

- Company Search
- Company Extract

NSW

- Address Search
- Owner Search
- Title Search
- Image Status Search
- Image Order (eg. plan, dealing, deed, primary application, SCIGS)

QLD

- Address Search
- Owner Search
- Lot Plan Search
- Title Search
- Image Search (eg. plan, title, dealing, pre-ATS dealing)

VIC

- Address Search
- Owner Browse
- Owner Search
- Lot Plan Search
- Title Search
- Image Search (eg. plan, instrument, survey report, title diagram)

**Hands On**

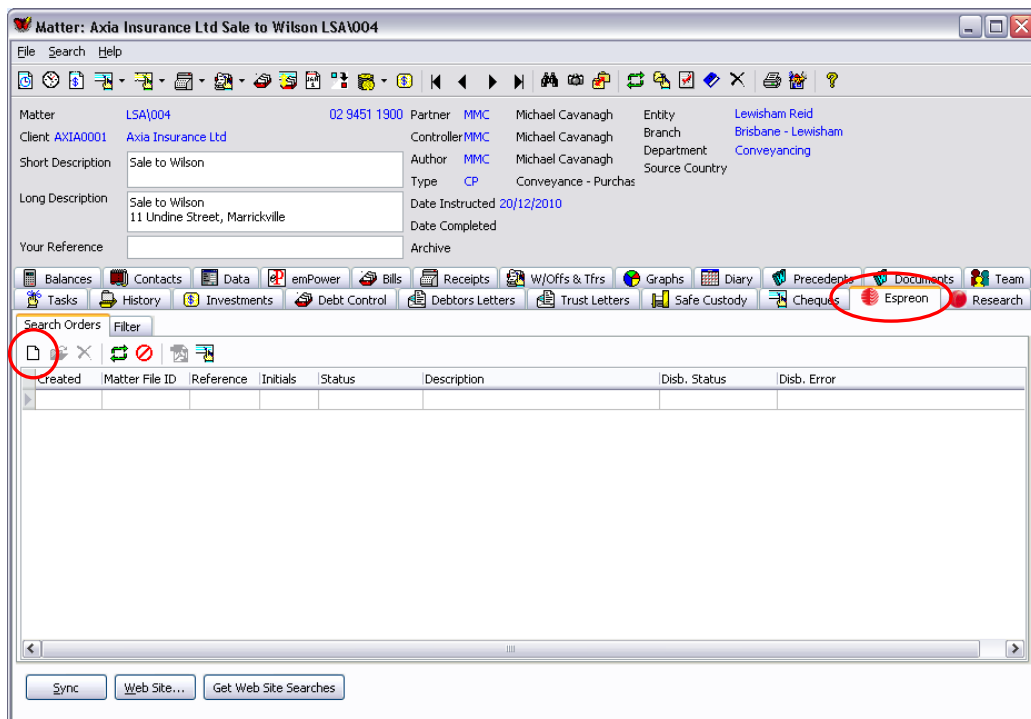
1. In Lexis Affinity, open a conveyancing matter (CV or CP matter type).


It is important to select the correct matter, as charges will automatically write to the matter ledger.

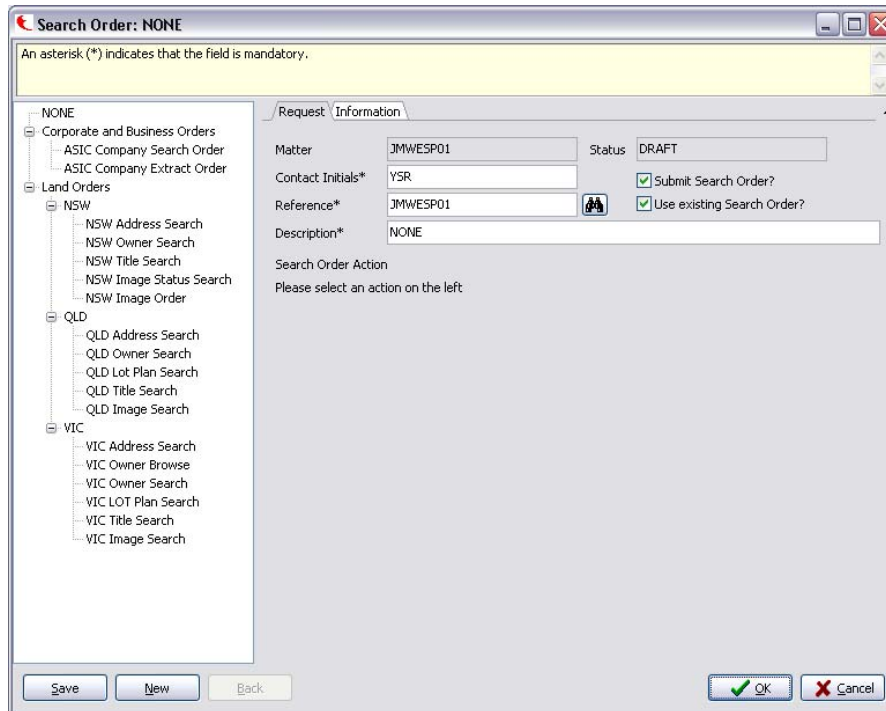


TIP: On your system, you may find that only some types of matters have access to Espreon. This is determined by your System Administrator. The most common matter types for use with Espreon are Conveyancing matters.

2. Select the Espreon tab.

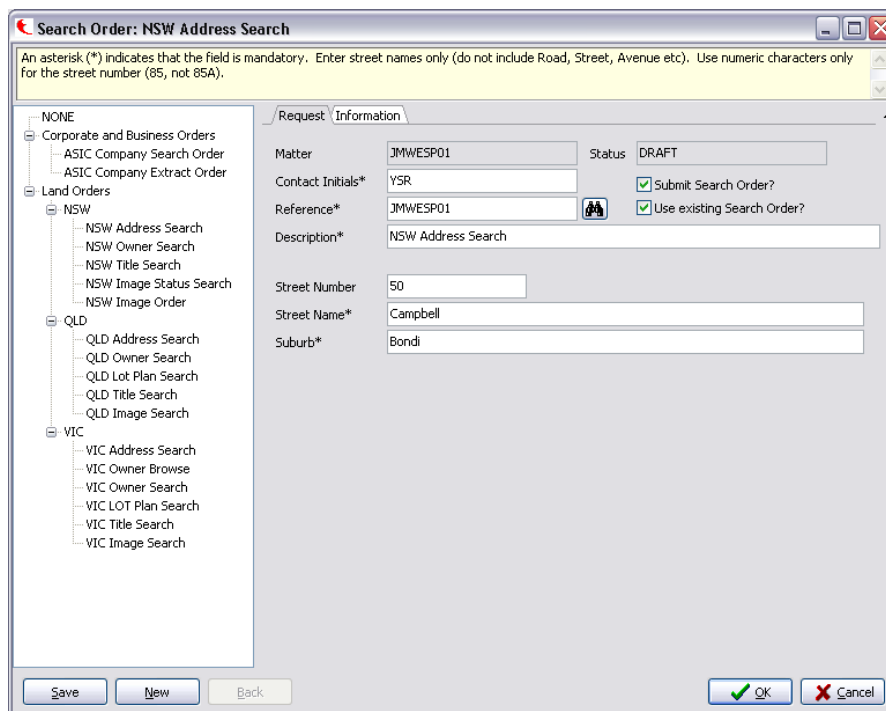


3. To perform a new search, click on the New Search Order icon . The following dialog will display:



4. Select a search to perform by clicking on the name of the search from the list on the left. This will display the required fields for completion:

Example: NSW Address Search



Note that you cannot enter unit numbers in the Street Number field for a NSW address search. Do not enter "Road", "Street" etc beside the Street Name.



TIP: The yellow box at the top of the window contains help text to assist you to complete the required details correctly. For example, fields marked with an asterisk * are compulsory.

5. Enter the details and select [OK] to submit the search order.

A list of properties matching the details entered will be returned.

An asterisk (*) indicates that the field is mandatory. Enter street names only (do not include Road, Street, Avenue etc). Use numeric characters only for the street number (85, not 85A).

Request Information

Matter: JMWESP01 Status: COMPLETE

Contact Initials*: YSR

Reference*: JMWESP01

Description*: NSW Address Search

Street Number: 50

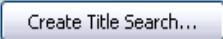
Street Name*: Campbell

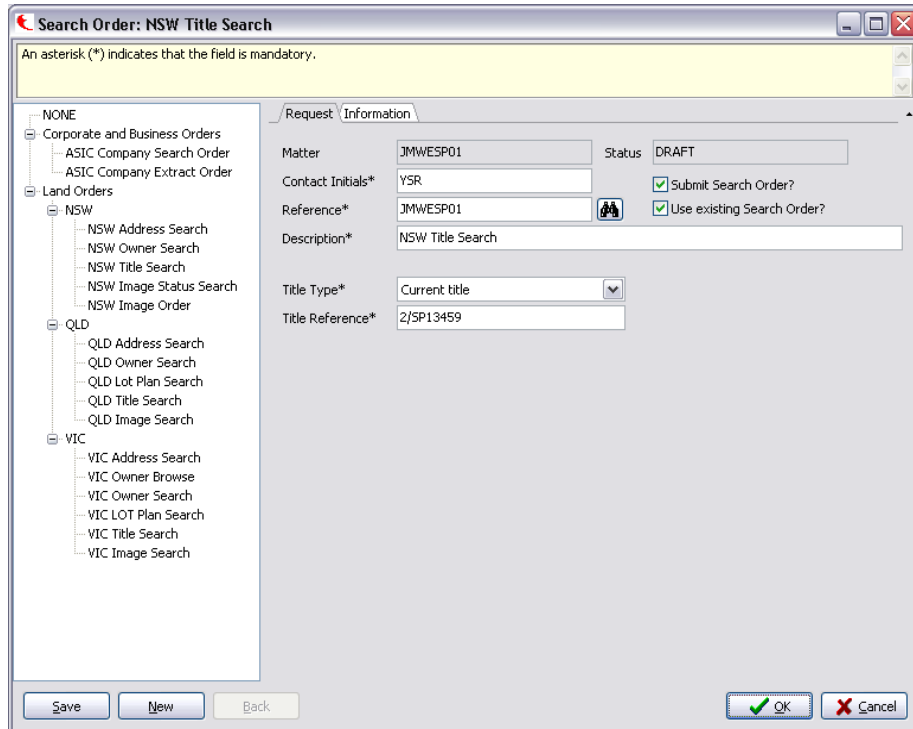
Suburb*: Bondi

Street Address	Title Reference
50-54 CAMPBELL PARADE, BONDI BEACH	1/SP13459
50-54 CAMPBELL PARADE, BONDI BEACH	2/SP13459
50-54 CAMPBELL PARADE, BONDI BEACH	3/SP13459
50-54 CAMPBELL PARADE, BONDI BEACH	4/SP13459
50-54 CAMPBELL PARADE, BONDI BEACH	5/SP13459
50-54 CAMPBELL PARADE, BONDI BEACH	6/SP13459
50-54 CAMPBELL PARADE, BONDI BEACH	7/SP13459
50-54 CAMPBELL PARADE, BONDI BEACH	8/SP13459
50-54 CAMPBELL PARADE, BONDI BEACH	9/SP13459
50-54 CAMPBELL PARADE, BONDI BEACH	10/SP13459

Create Title Search...

Save New Back OK Cancel

6. If you are ready to perform the title search, select the property required, and then click on . This will auto-populate the NSW Title Search order form.



Search Order: NSW Title Search

An asterisk (*) indicates that the field is mandatory.

Request Information

Matter: JMWESP01 Status: DRAFT

Contact Initials*: YSR Submit Search Order?

Reference*: JMWESP01 Use existing Search Order?

Description*: NSW Title Search

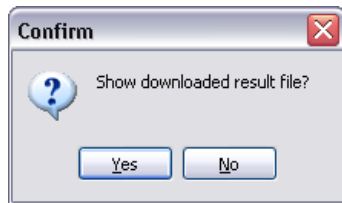
Title Type*: Current title

Title Reference*: 2/SP13459

Buttons: Save, New, Back, OK, Cancel

7. Click [OK] to perform the title search.

The following message will display:



Confirm

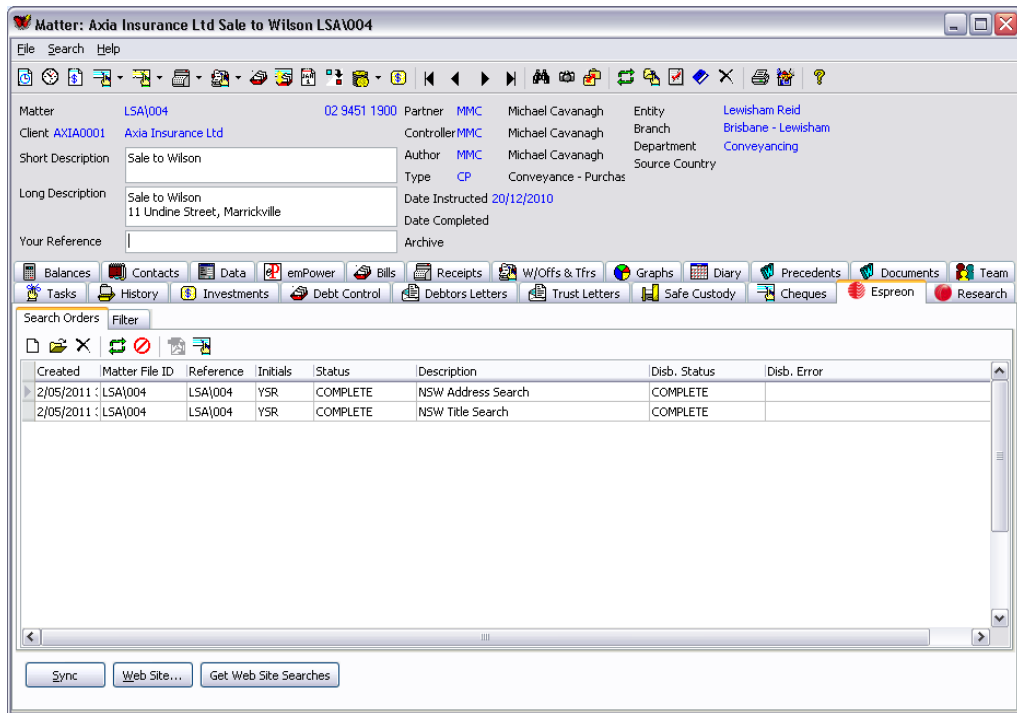
Show downloaded result file?

Buttons: Yes, No

If you select [Yes] the document will open in your PDF Reader. If you select [No] you will be returned to the order dialog box for this search.

You can click either [OK] or [Cancel] to close the order windows.

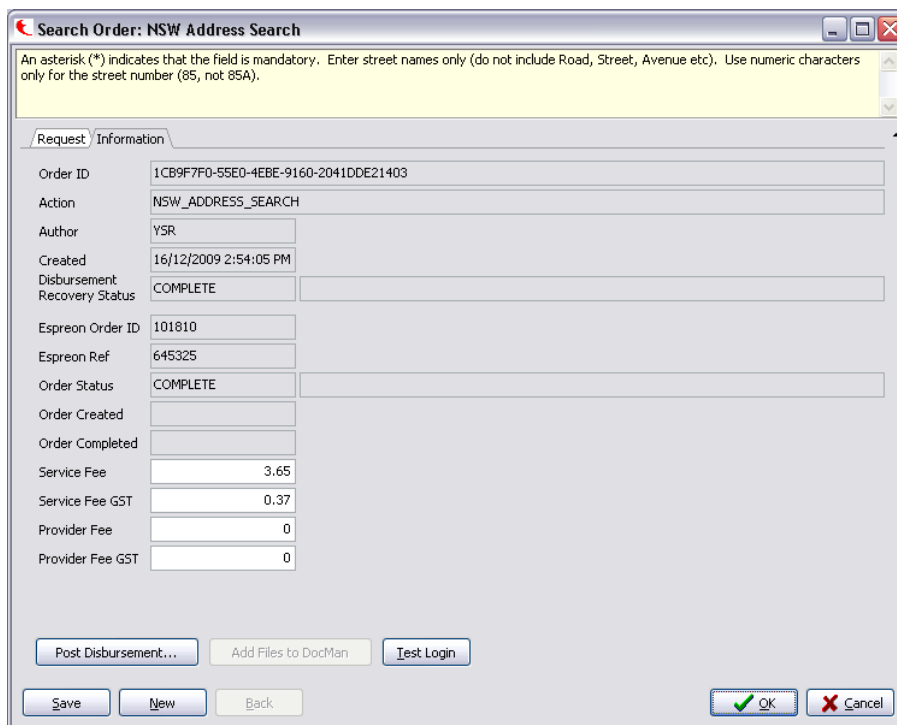
The Espreon tab will then show a list of orders submitted for this matter.



Based on the actions described above, this window will show 2 orders: a NSW Address Search order and a NSW Title Search order.

To view the details of these orders, select the order and click on the button, or simply double-click on the order.

8. Double-click on the NSW Address Search Order. Click on the "Information" tab:



The "Information" tab show details for this order.

Order ID: A unique ID assigned by Lexis Affinity to each order.

Action: The name of the search.

Author: Initials of the employee who ordered the search.

Created: Date the search order was created in Lexis Affinity.

Disbursement Recovery Status:

Indicates if a disbursement has been captured against the matter for this order. This will show as complete or in progress.

Espreon Order ID:

A unique ID assigned to the order by Espreon.

Espreon Ref:

A unique reference number assigned to the order by Espreon. This is used as the reference number for the bill by Lexis Affinity.

Order Status:

Indicates whether the order is complete, in progress or has failed.

Order Created:

Date order created at Espreon.

Order Completed:

Date order completed at Espreon.

Service Fee: The fee charged by Espreon for performing this search.

Service Fee GST:

The GST applied to the service fee.

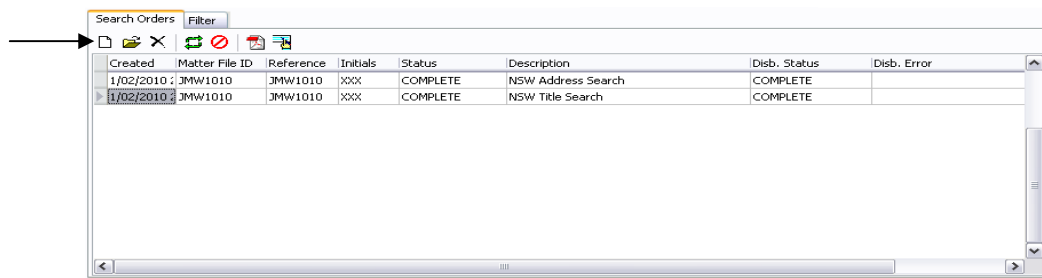
Provider Fee:

The fee charged by the provider for performing this search.

Provider Fee GST:

The GST applied to the provider fee.

17.2 Search Order Toolbar



Submit a new search order. The search order window will open.



Open a search order currently in the list. Select the order first.



Delete a search order in the list. Select the order first.



Refresh the display.



Clear the filter.



Open the PDF document for the search. Note that not all searches return a PDF document. If there is no PDF result, this button will be inactive.

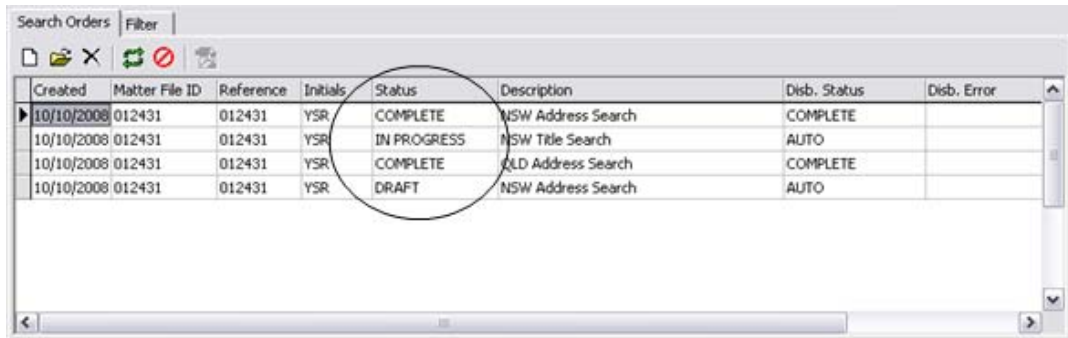


Post Disbursement. Processes disbursements that are set to "auto" and not yet complete.

17.3 Search Status

When a search is submitted it is placed in a queue. Sometimes the results will be returned quickly; other times there may be a delay.

The Status field is important as it shows what is happening with a particular order.



Created	Matter File ID	Reference	Initials	Status	Description	Disb. Status	Disb. Error
10/10/2008	012431	012431	YSR	COMPLETE	NSW Address Search	COMPLETE	
10/10/2008	012431	012431	YSR	IN PROGRESS	NSW Title Search	AUTO	
10/10/2008	012431	012431	YSR	COMPLETE	QLD Address Search	COMPLETE	
10/10/2008	012431	012431	YSR	DRAFT	NSW Address Search	AUTO	

Complete: The search order is complete and results are available.

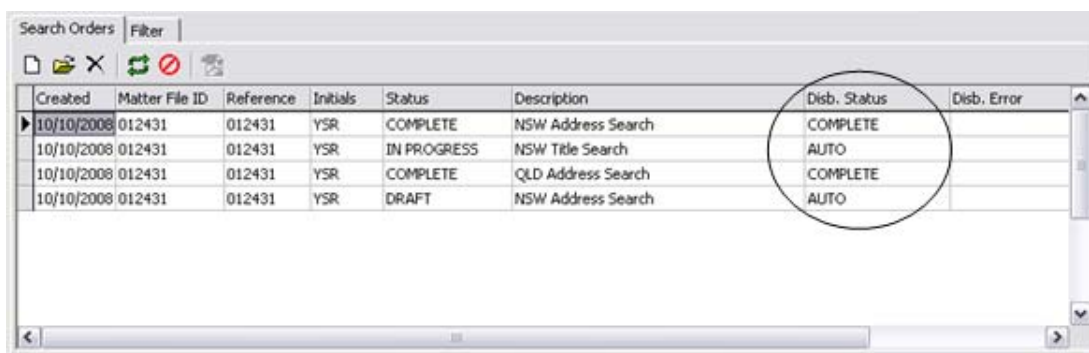
In Progress: The search order is in the queue but results are not yet available.

Draft: The search order has been saved but not yet submitted.

Failed: The search order cannot be completed. This may be because invalid data has been entered or because the service is not currently available. Note that if a search has failed, you will need to attempt to submit it again later. Once a search has failed, Affinity will not attempt to re-submit it.

17.4 Disbursement Recovery Status

The Disbursement Status field indicates whether a disbursement has been captured against the matter for this search.





The screenshot shows a software window titled 'Search Orders' with a 'Filter' tab. Below the title bar are several icons: a folder, a close button (X), a refresh button, a stop button, and a search button. The main area contains a table with the following columns: Created, Matter File ID, Reference, Initials, Status, Description, Disb. Status, and Disb. Error. The 'Disb. Status' column is circled in red. The table contains four rows of data.

Created	Matter File ID	Reference	Initials	Status	Description	Disb. Status	Disb. Error
10/10/2008	012431	012431	YSR	COMPLETE	NSW Address Search	COMPLETE	
10/10/2008	012431	012431	YSR	IN PROGRESS	NSW Title Search	AUTO	
10/10/2008	012431	012431	YSR	COMPLETE	QLD Address Search	COMPLETE	
10/10/2008	012431	012431	YSR	DRAFT	NSW Address Search	AUTO	

Complete: The disbursement has been captured and can be viewed by displaying the ledger.

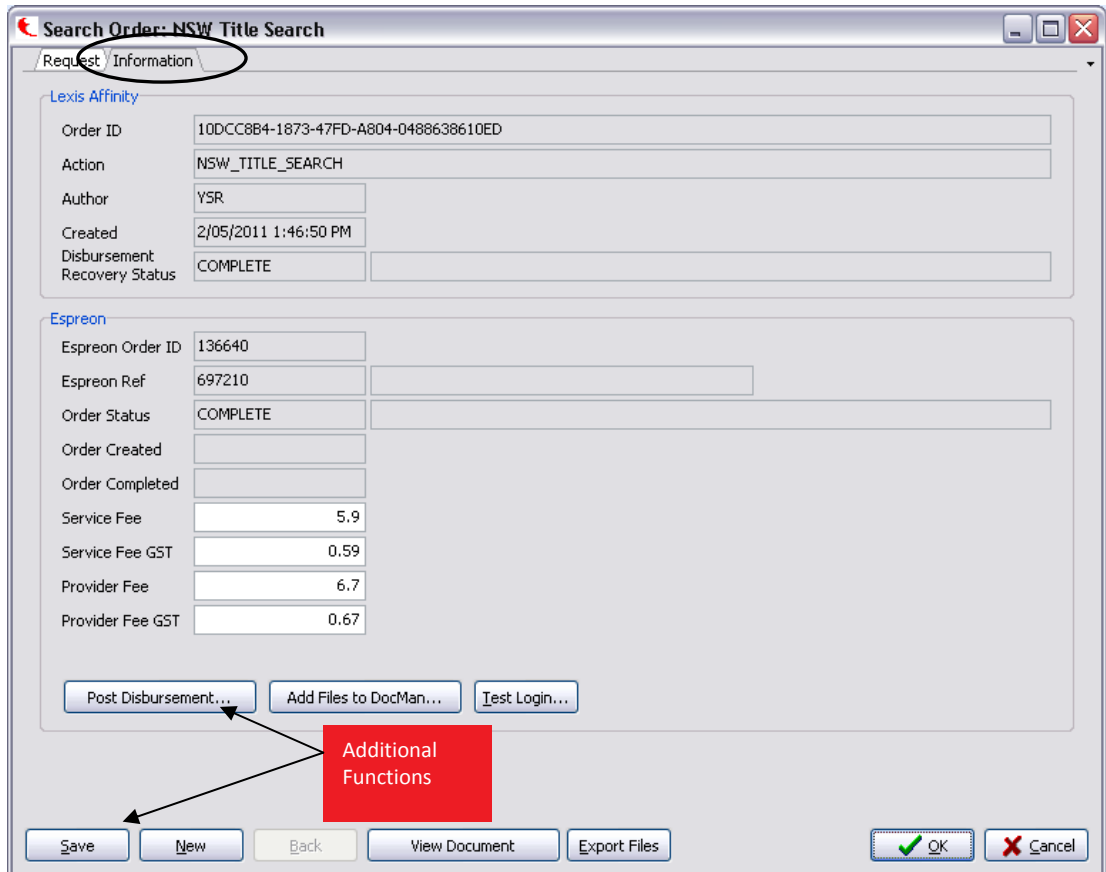
Auto: A disbursement will be captured automatically but it is still in progress.

Hold: Disbursement recovery is on hold for this search. You need to post it manually by clicking on the Post Disbursement  button.

None: No disbursement recovery is set up for this search type. You may still post the disbursement manually by clicking on the Post Disbursement  button.

17.5 Other Functions

Various other functions are available in the Search Order window, however their availability depends upon the type of search being performed. Open the order and select the "Information" tab to access these functions.



Search Order: NSW Title Search

Request / Information

Lexis Affinity

Order ID	10DCC8B4-1873-47FD-A804-0488638610ED	
Action	NSW_TITLE_SEARCH	
Author	YSR	
Created	2/05/2011 1:46:50 PM	
Disbursement Recovery Status	COMPLETE	

Espreon

Espreon Order ID	136640	
Espreon Ref	697210	
Order Status	COMPLETE	
Order Created		
Order Completed		
Service Fee	5.9	
Service Fee GST	0.59	
Provider Fee	6.7	
Provider Fee GST	0.67	

Post Disbursement... Add Files to DocMan... Test Login...

Additional Functions

Save New Back View Document Export Files OK Cancel

Save: Save search details without submitting the search order. This will create an order but the status will show as DRAFT. You can open the search later and click [OK] to submit the search.

New: Create a new search order.

Back: Go back to the previous screen (only available on some search screens).

View Document:

View the document returned with the search. This can also be done from the "Documents" tab on the matter if you are using Document Management.

Export Files:

Exports (copies) the files associated with the search. This is usually a single PDF document. Browse to the folder where the file is to be copied to.

Post Disbursement:

Click this button to post the disbursement if it has not been posted automatically.

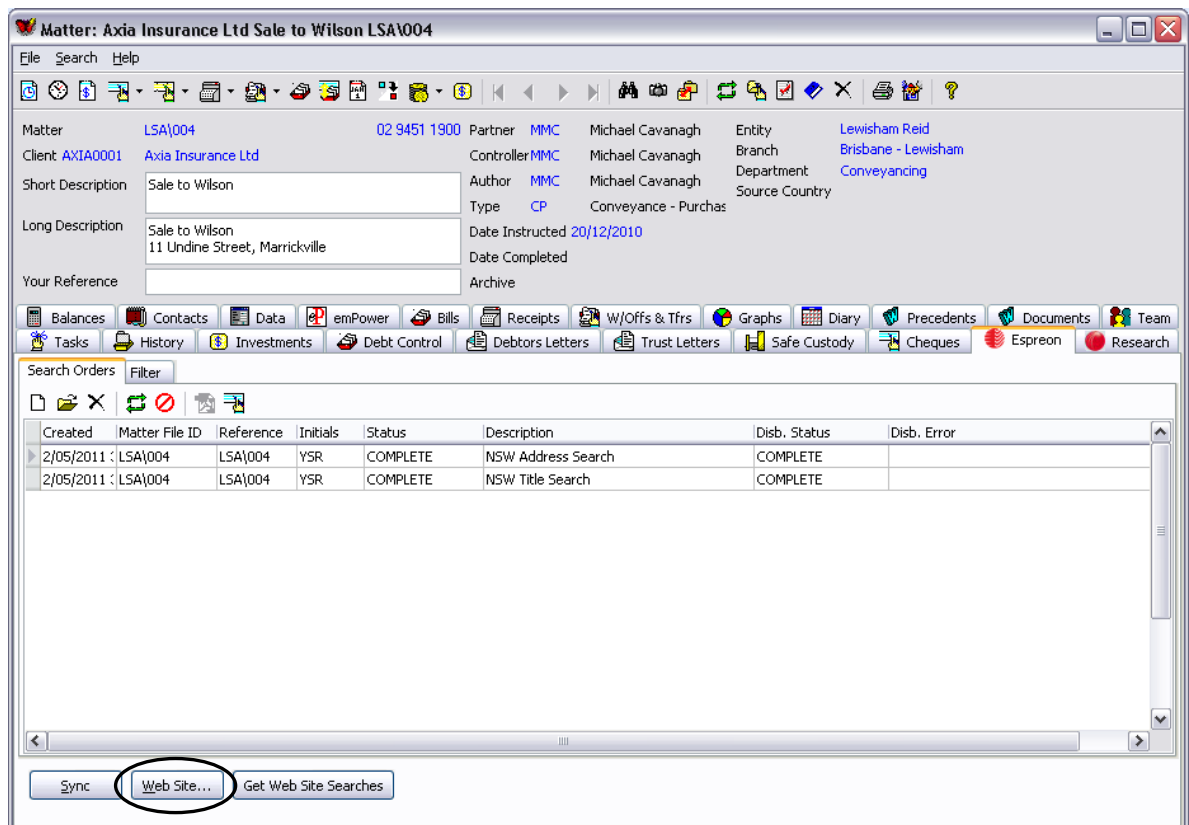
Add Files to Docman:

This button is used only where files have been downloaded to Espreon but the import to Document Management has failed. Clicking this button will import the files so that they are available on the "Documents" tab on the matter.

Test Login: Click this button to test your connection to the Espreon web site is valid and functioning correctly.

17.6 Espreon Web Site

The [Web Site...](#) button is available from the "Espreon" tab in the matter window.

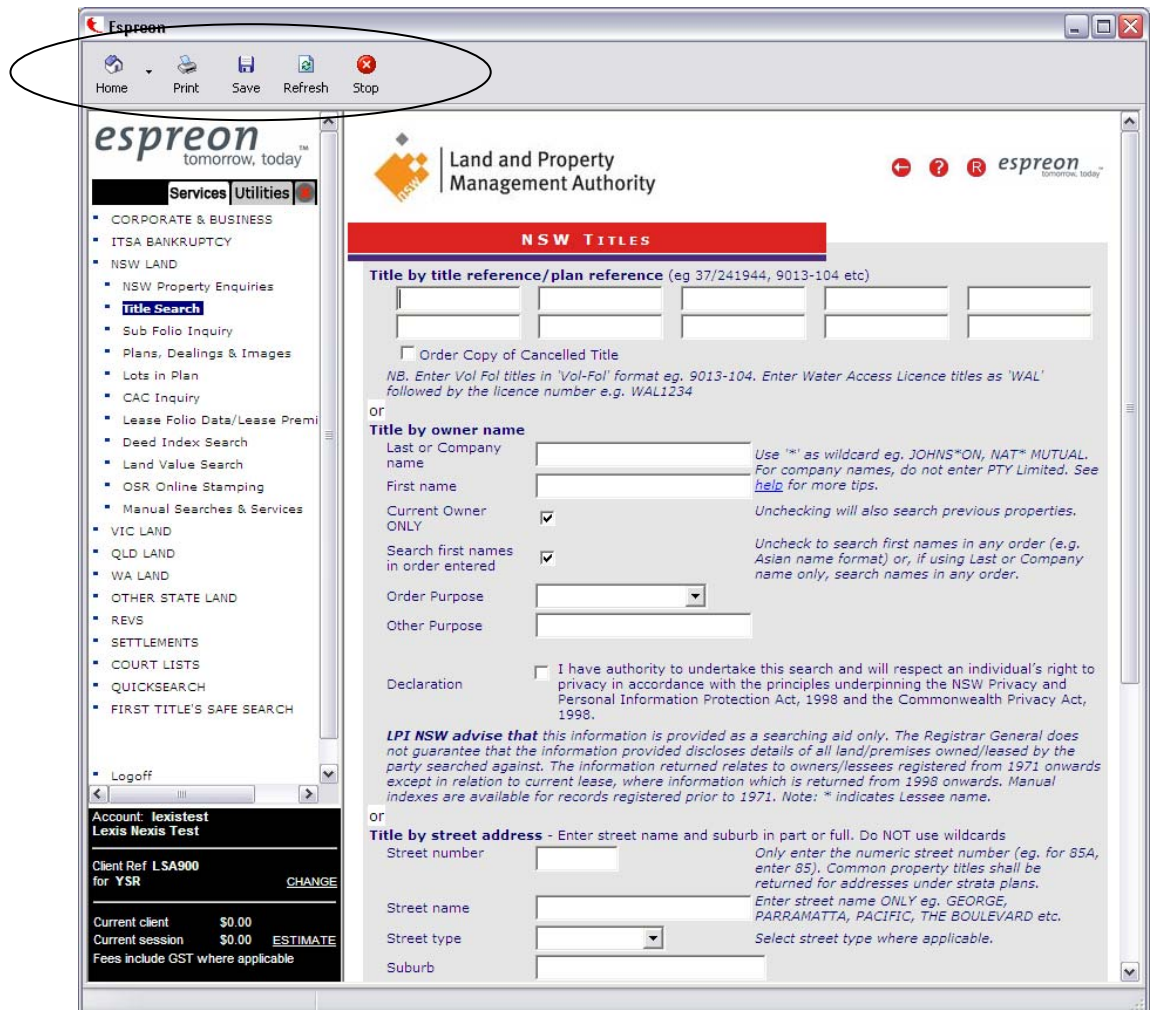


Click on this button to login to the Espreon web site. This will allow you to perform any search provided by Espreon.

Lexis Affinity Toolbar

When you login to the Espreon web site via Lexis Affinity, the page opens inside a Lexis Affinity window. This window has buttons to allow you to perform certain functions such as saving your results back to the Lexis Affinity matter.

The buttons available on this toolbar are controlled by your System Administrator. You may not see all the buttons described below.



The screenshot shows the Espreon web application interface. At the top, a toolbar is circled in red, containing buttons for Home, Print, Save, Refresh, and Stop. The main content area is titled "NSW TITLES" and contains search options: "Title by title reference/plan reference", "Title by owner name", and "Title by street address". A sidebar on the left lists various services and utilities. The bottom of the page shows account information and session details.

Home: Go back to the home page.


Print: Print the current search page. This will show a print preview first, then send the page to the printer if required.

Save: Save the search results and download files and disbursement information.

Refresh: Refresh the current window.

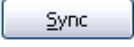
Stop : Stops the current search.


17.6.1 Saving Search Results from the Espreon Web Site

The  on the web site toolbar performs the following functions:

1. Saves a PDF document back to Lexis Affinity, if available.
2. Saves the disbursement details back to Lexis Affinity.

Both these functions are not necessarily immediate and in all cases, the disbursement details will not be posted to the matter ledger until the following day. This is because these details are put together by Espreon as an overnight process. When you open Lexis Affinity on the following day, a synchronisation process will be performed to retrieve the disbursement details that have not yet been returned. Often, the PDF documents will be returned on the same day.

Click on the  button in the matter window (Espreon tab) to perform a manual synchronisation for all matters,.

Click on the  button in the matter window (Espreon tab) to perform a manual synchronisation for the current matter and current user only.