TOF Engineers and Consulting Ltd.

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SoftPro Nigeria Limited

Law Office Manager Software System

Operational Guide

June 2003

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1 Introduction and Features of Law Office Manager

Law Office Manager (LAWMAN) is designed to aid law firms of all categories in managing clients information, scheduling of legal activities and services rendered to clients, as well as billing and tracking of client's accounts with the firm.

1.1 Law Office Manager Features

- Captures and manages clients information
- Captures and manages case information with facility to attach cases to clients.
- Captures visual representation of case related information such as photographs of crime scene, photographs of evidence and any related electronic information relating to the case.
- Scheduling of activities such as court appearances, hearings and filing injunctions in courts.
- Provision of reminders on scheduled activities based on your coded instructions, automatically generated when you start the software.
- Facility to code service you provide to clients; improves accuracy in billing of clients
- Ability to assign counsel/client executive to each client/case.
- Maintains records of activities on each case such as court appearances, court hearings, meetings, judgements and sentencing details, including court locations and counsel/staff that handled the activity.
- Records all activities performed for clients including those that are not litigation specific, for example, conveyance services.
- Maintains cases history, including continuous assessment of cases.
- Maintains details of client's charges and payments.
- Generates statistics such as returns on cases, status of cases while open and on completion.
- Comprehensive reporting facilities.
- Facility for cross-referencing your search with information in the your databank.
- Integrates seamlessly with third party digital information and referencing services, such as case reports and indexes, which are now commonly sold on compact discs. This empowers your legal officers with relevant on-line information to prepare for cases at his/her workstation without the need to continually get up to search for reference materials.

1.2 Brief on Operations

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- Statistics
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- Housekeeping

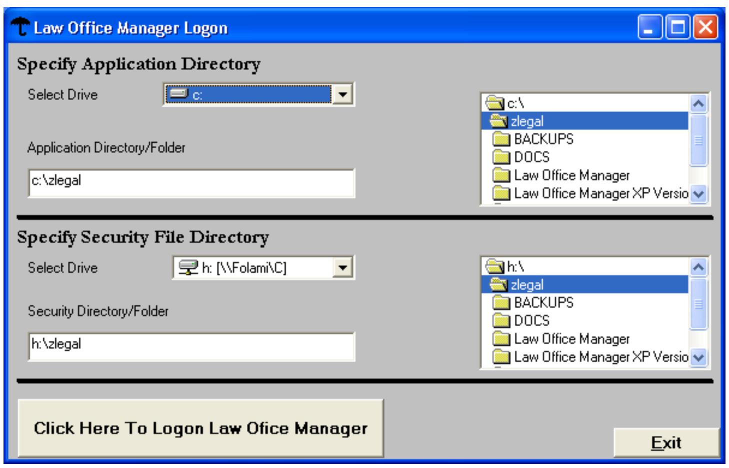
1.3 Installing Law Office Manager

Installation is described in detail in the System Administration User Guide and the Readme file.

Law Office Manager requires Microsoft Office 2000 or XP to operate. You must specify which version of Microsoft Office you have so as to configure Law Office Manager for your environment.

1.4 Starting Law Office Manager

1. Double Click on the LAWMAN icon on your desktop or Select LAWMAN from the Program menu bar.



2. Specify (if required) the application directory where the program files are located (defaults is c:\zlegal)
3. Specify the directory/folder where the security file is located, (defaults is c:\zlegal)
4. Click "**Click Here To Logon To Law Office Manager**"
5. Log in with you username (**mainuser** if this is the first time).
6. This starts LAWMAN and displays the main interface after a few seconds.

If the program does not work it may be because of proper configuration. Consult Vendor

1.5 Changing Your Password.

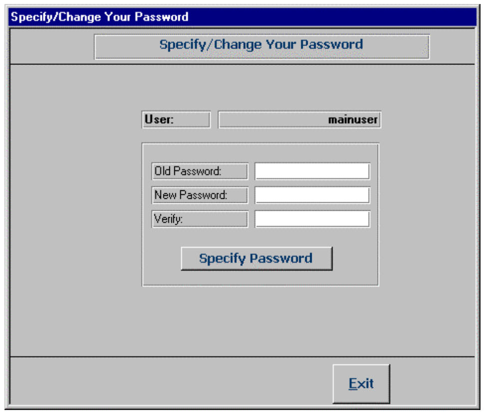
Before you continue to use LAWMAN for your operations, you must be aware that there is one function every registered user of LAWMAN can perform. This is to change his/her password.

Your passwords must be secret to the user; even the system administrator should not be aware of your password. The system administrator(s) can only clear your password, if you forget it, to allow you to specify another one.

The procedure for changing your password is simple.

1. Click "**Change Password**" on the main interface.
2. On the resulting enter your **Old Password** in the appropriate field (Leave blank if you do not have a password or you are specifying one for the first time).
3. Enter your new password in the field labelled "**New Password**"
4. Enter the new password again in the field labelled "**Verify**"
5. Click "**Specify Password**".
6. You will be prompted if the **New Password** and the **Verify** do not match exactly. You must re-enter both again to ensure registration of the password.

The next time you log on to LAWMAN you must specify this password to gain access.



1.6 On Line Help facility

To assist in using LAWMAN, you can view the operational and system manuals via **Law Office Manager->Documents** from the Programs menu on Start Menu bar.

1. Select **Law Office Manager** from the Programs menu on Start Menu bar
2. Select **Documents** from the sub menu
3. Select the document you want to view from the Documents sub menu e.g. Double-click **the document**. This would display the required document. You can navigate/use the document as you normally use any similar document. You have the choices of
   - LAWMAN Operational Guide
   - LAWMAN System Administration Guide
   - Customer Feedback Change Request
   - Customer Feedback Problem Reporting

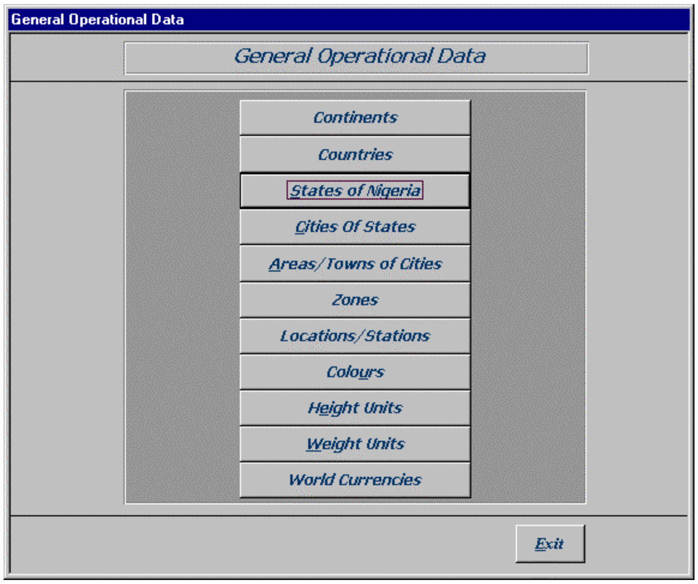
You require Microsoft Word and Acrobat Reader on your computer to view the files.

2 Configuring Law Office Manager with Operational Data

To obtain meaningful results and statistics from the software, you must configure it with operational information, which includes causes of actions, list of courts, list of your counsel and other legal staff, legal charges rates and status of cases and clients.

2.1 Configuring with General Information

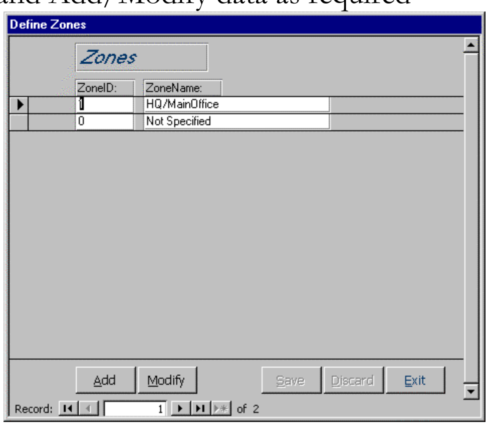
1. On the main interface, click **Operational Data**.
2. Click **General Information**; this displays the interface below.



You can now enter the information depicted by each button, which are self explanatory, e.g.

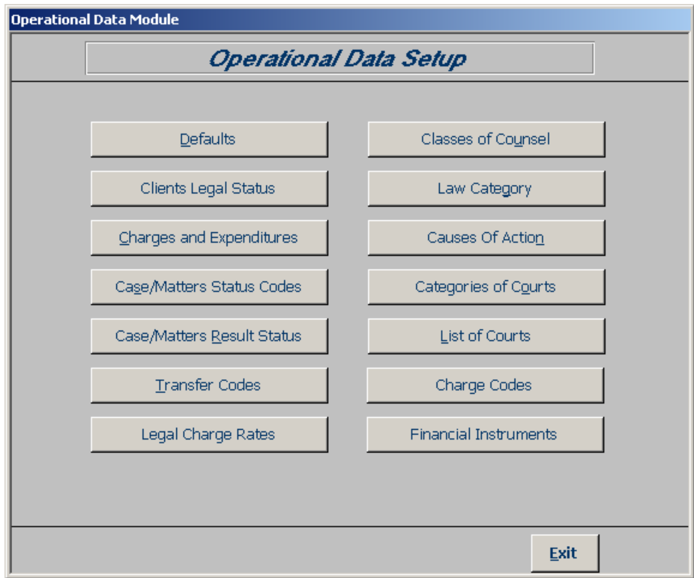
- **Zones** indicate the geographical zones in Nigeria, as specified by the client
- **Locations/Stations** is the location in a *zone* where your office/branch is located.

Click a desired button and Add/Modify data as required



2.2 Configuring with Operational Information

1. On the main interface, click **Operational Data**.
2. Click **Operational Information**; this displays the interface below.

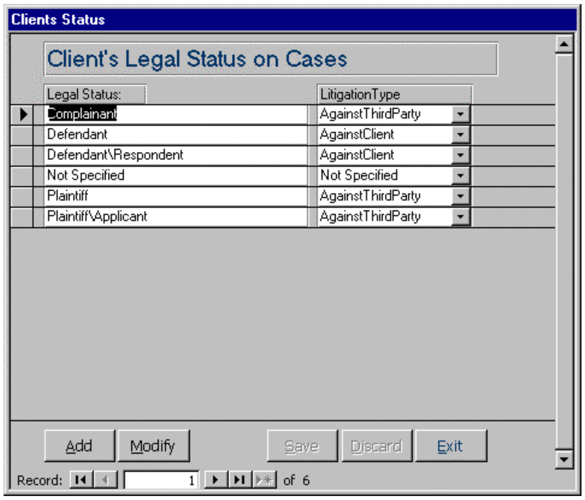


You can specify the operational information by clicking the respective buttons to Add new information or Modify existing information. Information required include

Clients Status	Information indicating if you accept or reject a client's request for your services
Clients Legal Status On Case	Whether a client is a plaintiff, defendant or complainant on a case
Charges And Expenditures	List of services you provide and charge clients
Case Status Codes	List of codes to indicate status of a case
Case Result Status	List of codes to indicate status of case on completion
State of Affairs On Cases	Comments on the current state of affairs on a case
Transfer Codes	List of codes indicating transfer status of case (to another court for example)
Classes of Counsel	Categories of counsel/lawyers/legal staff in your employ.
Law Category	Various legal categories e.g. Criminal / Civil / Constitutional/ etc
Causes of Action	Causes of Actions
Categories of Courts	Various types of courts; Magistrates, High Court, Supreme Court etc.
Charge Codes	Codes to indicate your legal charges
Legal Charge Rates	Charge rates based on level/classes of counsel/staff
Financial Instruments	Codes indicating instruments of financial transactions, e.g. cash, cheques, drafts etc.

For example

1. On the main interface, Click **Operational Data Setup**, then click **Operational Information**
2. Click the operational information you want: e.g. click **Clients Legal Status on Case** on the resulting interface. This displays the interface through which you enter new or modify information on existing status.



3. To add new details, Click **Add**, then enter the information on the text boxes.
4. To modify existing details,
   a. Move to the record you want to modify,
   b. Click **Modify** and replace information in the text boxes as desired
5. To discard the new entry/modification, Click **Discard**
6. Click **Save** to save the information.

Follow same procedure for all the operational data indicated.

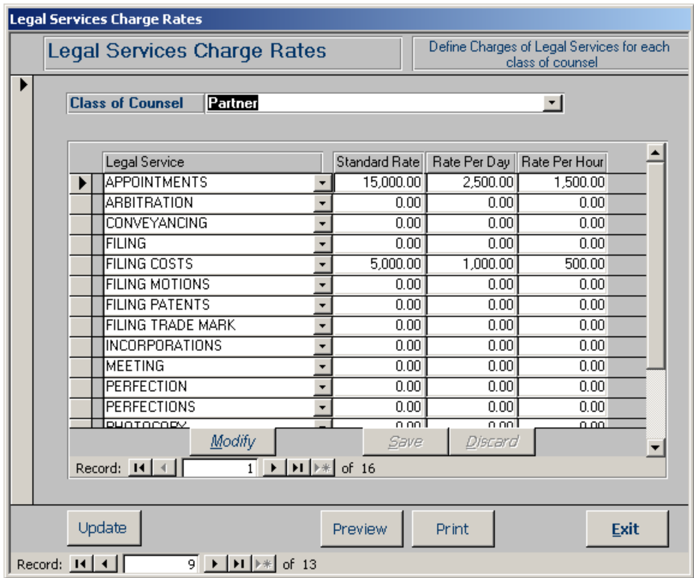
2.2.1 Specifying and Configuring Legal Charge Rates

Law office Manager offers the facility to define charge rates for all legal services you provide based on the category/class of your staff/counsel. For example, the rate for a junior partner appearing in court will be less than that of a senior or a principal partner. Furthermore, there is the facility to specify charge rates for 3 different modes; **Standard Rate, Rate Per Day and Rate per Hour**. This will be configured on implementation and you have total control in modifying the rates.

However, prior to defining the charge rates you must have defined your legal services and classes of counsel (i.e. categories of your staff) to enable accurate specifications.

Define Classes of Counsel and of all categories of staff in your firm:
Click Classes of Counsel in Step2 above
Define all the Legal Services you provide to your clients
Click Legal Charge Rates in Step2 above
You can then proceed to specify the charge rates.

1. On the main interface, Click **Operational Data Setup**, then click **Operational Information**
2. Click the Legal Charge Rates. This displays the interface below through which you specify the rates.



Notice that a template for each type of charge is displayed for each class of counsel. In the example above, the template is for a partner.

3. Select the Class of Counsel from the combo box labelled Class of Counsel.
4. Select the Legal Service you want to specify its rates.
5. Click Modify and then enter the appropriate rates depending on the policy in your firm; either Standard Rate, Rate Per Day or Rate Per Hour; You may define it for all if it fits your policy.
6. Once you have finished, Click Save to save the record.
7. Return to step 4 to specify rates for another service.
8. Return to Step 3 to specify rates for another class of counsel.

Notice that there is no add button in the inset. This is because templates are created and initialised with zeros anytime a new class of counsel or a new legal service is added.

3 Law Office Manager

After you have created valid users of the software and introduced operational data as dictated in the previous chapter, you are now ready to use the software to assist in performing your duties.

On the main interface, click **Law Office Management**. This displays the interface below showing a snapshot/overview of the available facilities of the software. These facilities include (as labelled on the buttons)

Courts	Manages Courts Information
Counsel/Lawyers	Manages Counsel/Lawyers and Staff names
Clients (Full Details)	Add/Modify clients full details
Cases (Full Details)	Add/Modify cases full details
Work Scheduling	Manage scheduling of activities for clients/cases
Information Search	Search current and historical data for information
Reports and Statistics	Manages reporting and generating statistics
Advanced Reports	Manages reporting based on (clients, cases and activities)
Financials	Invoicing and managing client's accounts
Statistics	Generating and reporting statistics
Information & Library Services	Registers connection to external information and applications

Each of these functions will be dealt with in subsequent chapter.

4 Counsel and Courts Information

After you have started LAWMAN and introduced operational data, you are now ready to use it to manage information in your legal offices. You must, however, have the list of your lawyers and legal staff as well as list of all the various courts, and the presiding judges, you may be visiting.

4.1 Counsel And Legal Staff

1. Click **Law Office Management** on the main interface.
2. Click **Counsel/Lawyers** on the resulting interface. This displays the interface through which you enter new counsel/staff or modify information on existing staff.

3. To add new details, Click **Add**, then enter the information on the text boxes.
4. To modify existing details,
   a. Move to the record you want to modify,
   b. Click **Modify** and replace information in the text boxes as desired
5. To discard the new entry/modification, Click **Discard**
6. Click **Save** to save the information.

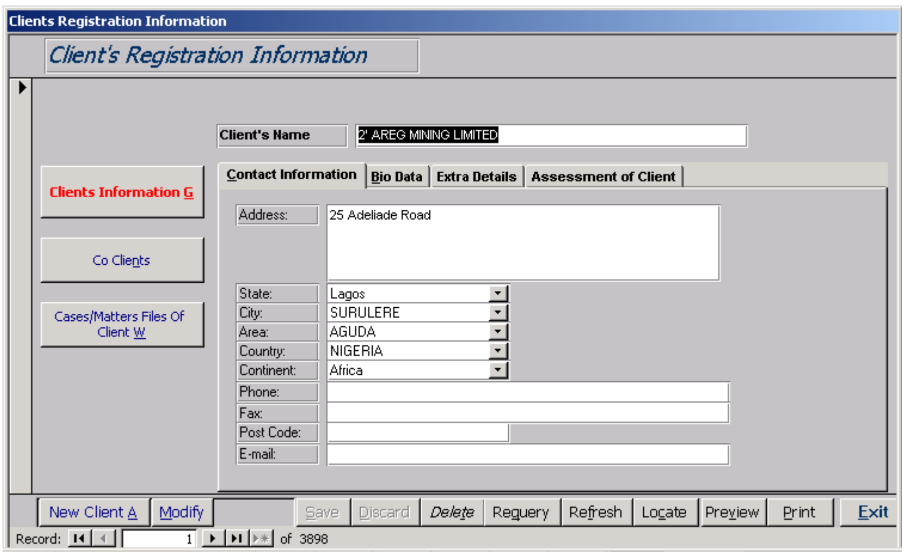
4.2 Courts and Causes of Action

The above procedure is the same to populate your system with the list of courts. Click **Courts**, in step 2 above, and enter courts information.

5 Clients Information

5.1 Entering And Modifying Clients Details

1. Click **Law Office Management** on the main interface.
2. Click **Clients (Full Details)** on the resulting interface. This displays the **Clients Information** form (below) through which you enter new clients or modify information on existing client's. *Notice that Clients Information button is highlighted with red colour*



To add a new client to your list

3. Click **New Client** on the bottom left corner of the **Clients Information** form.
4. In the text boxes, enter

Clients Reg No:	a unique identifier assigned to the client in your office
Date:	the date the client registered for your legal services
Client Name	the name of the client

3. Click **Contact Information** tab, then enter contact information in the text boxes (optional)
4. Click **Bio Data** tab and enter personal information of the client (optional).
5. Click **Extra Details** tab and enter extra information on the client (optional).
6. Click **Assessment of Client** tab and enter your assessment of the client (optional).
7. Click **Save** to save the information in the database.
8. Click **Finish** to return to original state ready for new entry/modification

To modify existing client's information

9. Click **Modify** on the bottom left corner of the Clients Information form.
10. Move to the client of interest using the navigation buttons at bottom of the form OR Click **Locate** at bottom of form and select the client of interest from the combo box list at top of the form.

11. In the text boxes, modify

Clients Reg No:	a unique identifier assigned to the client in your office
Date:	the date the client registered for your legal services
Client Name	the name of the client

12. Click **Contact Information** tab, then modify contact information in the text boxes (optional)
13. Click **Bio Data** tab and modify personal information of the client (optional).
14. Click **Extra Details** tab and modify extra information on the client (optional).
15. Click **Assessment of Client** tab and modify your assessment of the client (optional).
16. Click **Save** to save the information in the database.
17. Click **Finish** to return to original state ready for new entry/modification

The buttons at the bottom of the form perform the following functions

Refresh:	Updates the record in display with new values if it has been changes
Requery:	Same as Refresh but add new records that have been entered in the database since the last requery
Discard:	Discards the changes made to data on an existing record or new entries before you **Saved** the changes/entries.
Locate:	Clears the form and displays a combo list of clients from which you can select a client of interest.
Preview:	Previews a report on the client in focus
Print:	Prints a report on the client in focus
Exit	Removes the form from view

5.2 Other Information on Clients

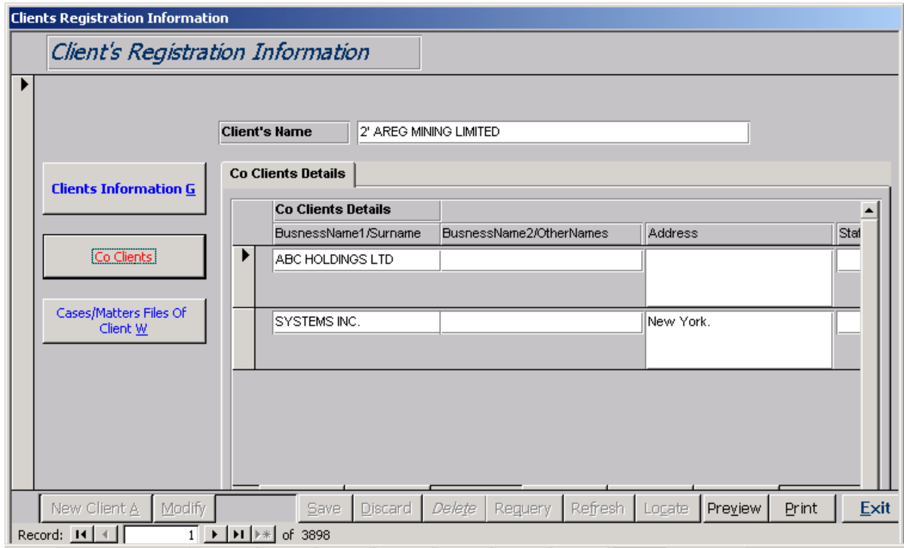
You will notice several buttons on the left hand side of the Clients information form and that the button labelled Clients Information is highlighted when it is first opened, indicating that you can enter/modify client information such as contact information, bio data and assessments.

However, there are other pertinent information relating to the services and advise you provide your clients that need to be managed. Examples of such information managed in this software are; Co-Clients, cases of clients and information links (electronic information (letters, photos, etc) relating to the client).

5.2.1 Recording Co-Clients of a client

If there are co-clients along with the client you entered, you must enter the details in your database.

1. On the Clients Information form, Click **Co-Clients**. This displays an inset through which you enter/modify co-clients details.



2. Click **Add** to enter Co-Clients Details
3. Enter information as indicated in the text boxes
4. Click **Save**, to save the details
5. Click **Finish** to return to original state ready for new entry/modification

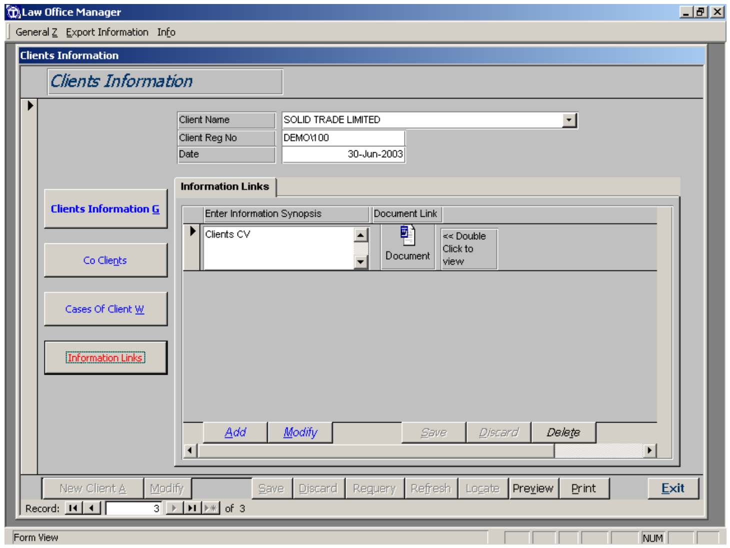
6. Click **Modify** to modify existing details
7. Replace current information with new entries
8. Click **Save** to Save the Details
9. Click **Finish** to return to original state ready for new entry/modification

5.2.2 Information Links: Linking electronic information to a client

1. On the Clients Information form, Click **Information Links**. This displays an inset through which you enter/modify references to electronic information relating to the client..
2. Click **Add**.
3. Enter the synopsis/brief of the information
4. Click the button **Click To Link Document**,
5. Click **Browse** to navigate through your computer and the network for the document

   Important: For networked implementations you must link to the document by accessing the document through the identity of the computer on the network. This ensures uniqueness of the location of the document on the network since a computer name is unique on the network. If you link a document via your normal c drive, for example, other users of LAWMAN on other computers on the network will not be able to access that document. The confusion would arise as to which c drive is the document located since all computers have a c drive.

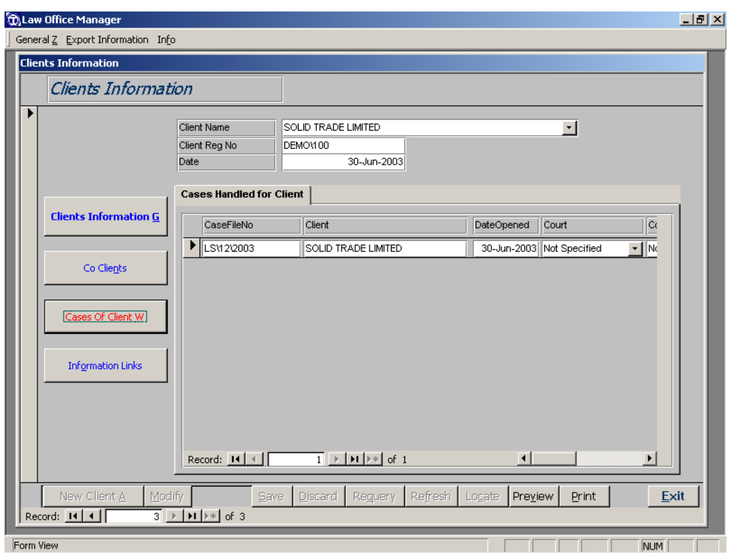
6. Select the document then click OK
7. Click **Save**, to save the link.
8. Click **Finish** to return to original state ready for new entry/modification



9. Click **Modify** to modify existing document link
10. If required, change the synopsis/brief of the information to link
11. If you want to select another document, click the button **Click To Link Document**,
12. Click **Browse** to navigate through your computer and the network for the document
13. Select the document then click OK
14. Click **Save**, to save the link.
15. Click **Finish** to return to original state ready for new entry/modification

5.2.3 Viewing cases/matters handled for client

To view cases handled for client, Click **Cases of Client**.

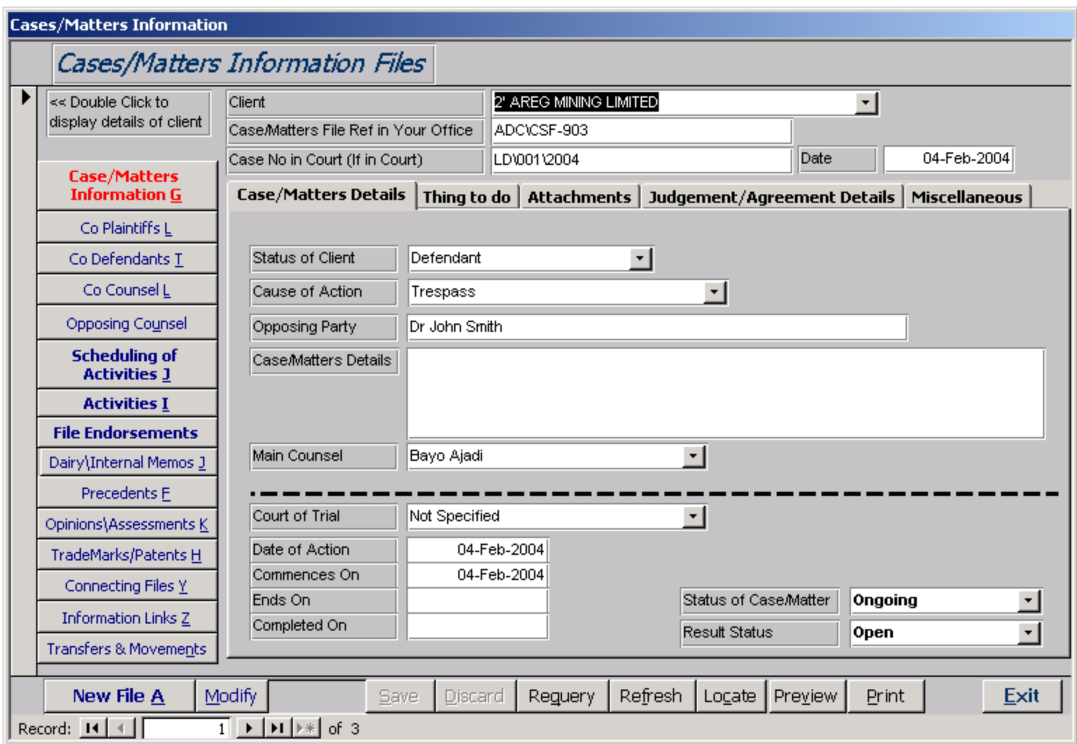


6 Cases/Matters Information

This section describes the procedures to record all relevant information on cases handled in your office. These include case details, judgments, assessments, co-plaintiffs, co-defendants, scheduled activities and linked information relating to the case. The procedures are similar to those for recording client's information in the previous chapter.

6.1 Entering and Modifying Cases/Matters Information

1. Click **Law Office Management** on the main interface.
2. Click **Cases/Matters (Full Details)** on the resulting interface. This displays the **Cases/Matters Information** form (below) through which you enter primary information on new cases/matters files or modify information on existing files. *Notice that Cases/Matters Information button is highlighted in red colour*



6.1.1 To add a new case/matter to your databank

3. Click **New File** on the bottom left corner of the **Cases/Matters Information** form.
4. In the text boxes, enter

Client	Name of the client
Case/Matters File Ref in your office	File Reference in your office
Case No in Court (if in Court)	Court Assigned case number
Date	Date Case/Matter file was opened

5. Click **Case/Matters Details** tab, then enter information on the case in the text boxes

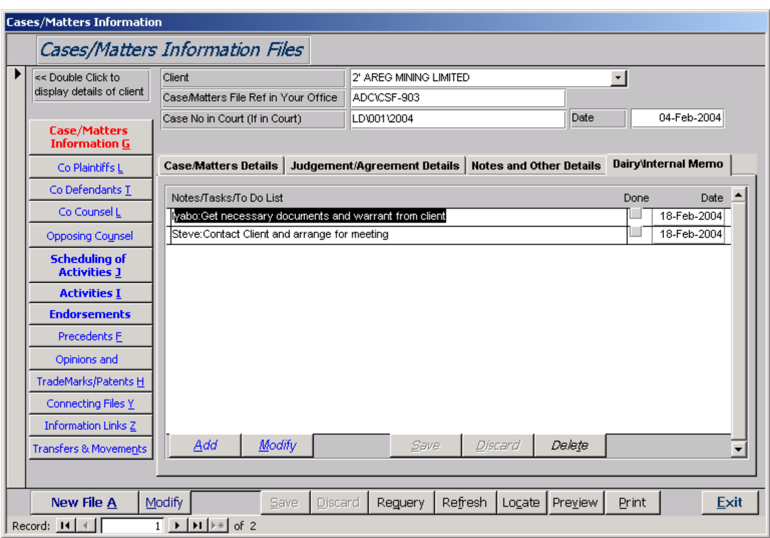
6. Click **Judgment/Agreement Details** tab and enter details relating to judgment if the case has been completed (optional).
7. Click **Miscellaneous** tab and enter general information on the case (optional).
8. Click **Save** to save the information in the database.
9. Click **Finish** to return to original state ready for new entry/modification

6.1.2 To modify existing case and matters file information

10. Click **Modify** on the bottom left corner of the Cases Information form.
11. Move to the case of interest using the navigation buttons at bottom of the form OR Click **Locate** at bottom of form and select the case of interest from the combo box list at top of the form.
12. In the text boxes, if required you can replace the information in the text boxes on the interface and on the various tab pages.
13. Click **Save** to save the information in the database.
14. Click **Finish** to return to original state ready for new entry/modification

6.1.3 To enter routine tasks to do on the case/matter

15. Click **Things To Do** tab.
16. Click **Add** on the bottom left corner of the tab page.
17. Enter the tasks in the Notes/Task/ToDoList you want.
18. Click **Save** to save the information in the database.
19. Click **Finish** to return to original state ready for new entry/modification



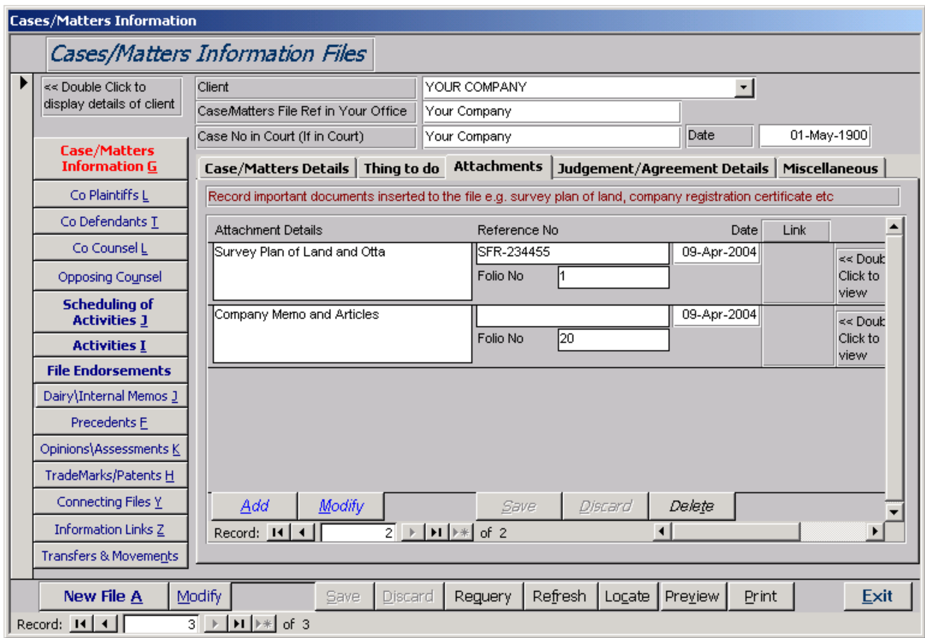
If the task has been performed, Click the check box labelled **Done**.

6.1.4 To enter file attachments indicating important documents held in your file

20. Click **Attachments** tab.
21. Click **Add** on the bottom left corner of the tab page.
22. Enter

   a. Attachment Details
   b. Reference No of document
   c. Folio Number.

23. Click Click to Link Document if the document is in electronic form on your server (ie. Scanned in for your reference). Browse for the document on the network and select it.
24. Click **Save** to save the information in the database.
25. Click **Finish** to return to original state ready for new entry/modification



The buttons at the bottom of the form perform the following functions

Refresh:	Updates the record in display with new values if it has been changed.
Requery:	Same as Refresh, but adds new records that have been entered in the database since the last update
Discard:	Discards the changes made to data on an existing record or new entries before you **Saved** the changes.
Locate:	Clears the form and displays a combo list of cases/matters files from which you can select a case/matter file of interest.
Preview:	Previews a report on the case/matter in focus
Print:	Prints a report on the case/matter in focus
Exit	Removes the form from view

6.1.5 Recording Co Plaintiffs

1. On the Cases Information form, Click **Co Plaintiffs**. This displays an inset through which you enter/modify co-plaintiffs details.
2. Click **Add** to enter the record of a co-plaintiff.
3. Enter information as indicated in the text boxes
4. Click **Save**, to save the details
5. Click **Finish** to return to original state ready for new entry/modification
6. Click **Modify** to modify existing co-plaintifss details

7. Replace current information with new entries
8. Click **Save** to Save the Details
9. Click **Finish** to return to original state ready for new entry/modification

6.1.6 Recording Co Defendants

1. On the Cases Information form, Click **Co Defendants**. And follow the steps 2 to 9 in previous section, 6.1.1

6.1.7 Recording Co Counsel

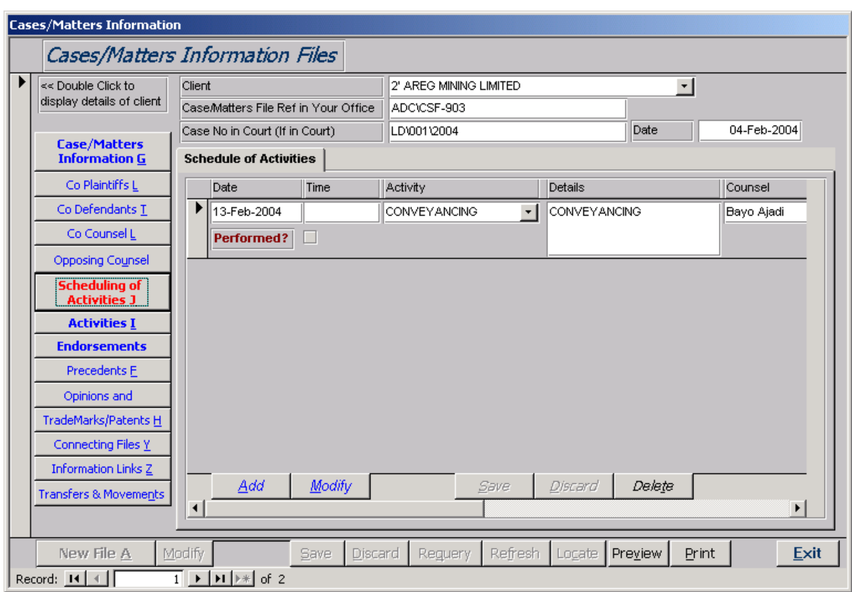
1. On the Cases Information form, Click **Co Counsel**. And follow the steps 2 to 9 in previous section, 6.1.1

6.1.8 Recording Opposing Counsel

1. On the Cases Information form, Click **Opposing Counsel**. And follow the steps 2 to 9 in previous section, 6.1.1.

6.1.9 Scheduling of Activities

1. On the Cases Information form, Click **Scheduling Of Activities**. This displays an inset through which you enter/modify details.



2. Click **Add** to enter the activity to be scheduled.
3. Enter information as indicated in the text boxes
4. Click **Save**, to save the details
5. Click **Finish** to return to original state ready for new entry/modification

6. Click **Modify** to modify existing scheduled activity
7. Replace current information with new entries
8. Click **Save** to Save the Details
9. Click **Finish** to return to original state ready for new entry/modification

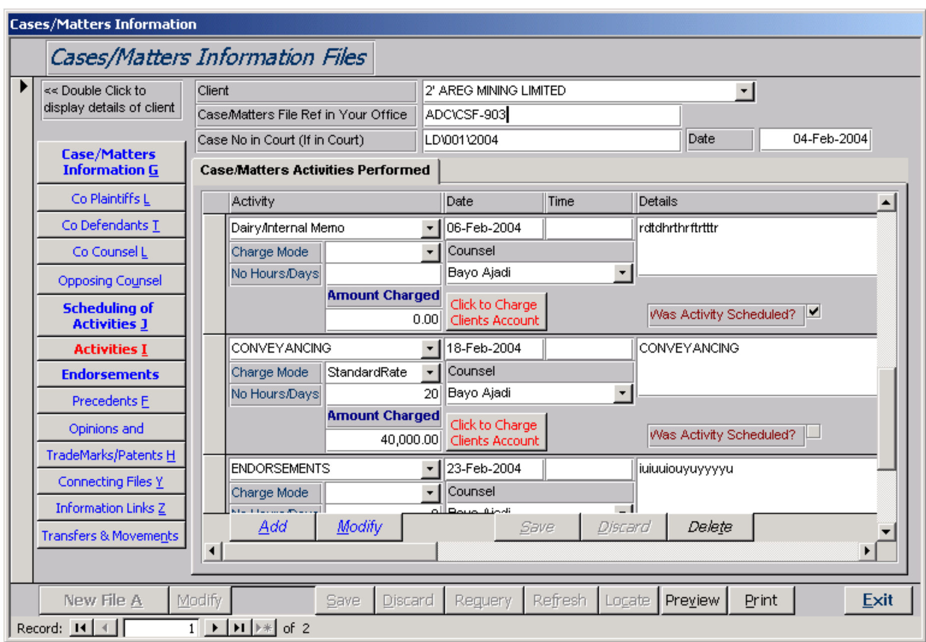
10. If a schedule has been performed, click the option flag labelled **Performed**.
11. This will remove the activity from the schedule, and put under **Activities**.
12. Click **Activities** to display.

6.1.10 Recording Case/Matters Activities and Charging Clients Accounts

This records case activities that were not scheduled. *Note that a scheduled activity that has been marked as performed automatically gets added to the case's activity history. This will also be the case for diary tasks that have been marked as Done.*

You can also charge the clients accounts directly from this interface once you have recorded the activity by clicking the appropriate button.

- On the Cases Information form, Click **Activities**. Follow steps 2 to 9 in 6.1.5.



Once you have recorded the case activity you can at this point charge the clients account with the cost of the service.

- Click Modify.
- Select the **Charge Mode**.
- Enter **No of hours** for Rate Per Hour or the **No of Days** for Rate Per Day in text box labeled **No of Hours/Days**
- Based on the above choices (and of the counsel in you changed it) the amount to be charged is automatically computed and displayed in the text box labeled **AmountCharged**.
- Optionally, you can change this amount charged if need be.
- Click **Save** then **Finish**. The button **Click to Charge Clients Account** will be activated.
- Click this button to automatically charge the clients account.

6.1.11 Recording File Endorsements on case/matters files

This provides the facility to record endorsements indicating the status of a case/matter. This captures the entries on the actual file that lawyers record the current status of the case/matter.

- On the Cases Information form, Click **File Endorsements**. Follow steps 2 to 9 in 6.1.5.

6.1.12 Recording Opinions And Assessments

The facility to enter opinions and assessments on a case/matter

- On the Cases Information form, Click **Opinions and Assessments**. Follow steps 2 to 9 in 6.1.5.

6.1.13 Recording Precedents

If the matter is in court, you may wish to cite the precedents in preparation for the case/matter.

- On the Cases Information form, Click **Precedents**. Follow steps 2 to 9 in 6.1.5.

6.1.14 Recording Connecting Files relating to Case/Matter in focus

- On the Cases Information form, Click **Connecting Files**. Follow steps 2 to 9 in 6.1.5.

6.1.15 Recording Transfers and Movements of Case

This handles movement of case from one court to another and/or one chamber to another.

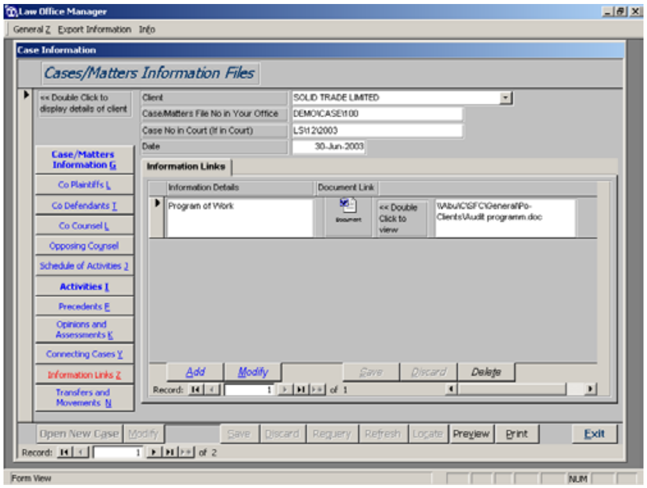
- On the Cases Information form, Click **Transfers and Movements**. Follow steps 2 to 9 in 6.1.5.

6.1.16 Information Links: Linking electronic information relating to case

1. On the Cases Information form, Click **Information Links**. This displays an inset through which you enter/modify references to electronic information relating to the case/matter.
2. Click **Add**.
3. Enter the synopsis/brief of the information
4. Click the button **Click To Link Document**,
5. Click **Browse** to navigate through your computer and the network for the document
6. Select the document then click OK
7. Click **Save**, to save the link.
8. Click **Finish** to return to original state ready for new entry/modification
9. Click **Modify** to modify existing document link
10. If required, change the synopsis/brief of the information to link
11. If you want to select another document, click the button **Click To Link Document**,
12. Click **Browse** to navigate through your computer and the network for the document
13. Select the document then click OK

    Important: For networked implementations you must link to the document by accessing the document through the identity of the computer on the network. This ensures uniqueness of the location of the document on the network since a computer name is unique on the network. If you link a document via your normal c drive, for example, other users of LAWMAN on other computers on the network will not be able to access that document. The confusion would arise as to which c drive is the document located since all computers have a c drive.

14. Click **Save**, to save the link.
15. Click **Finish** to return to original state ready for new entry/modification



7 Work Scheduling

After recording your clients and the cases you handle for them, you will, on a day-to-day basis, perform and schedule activities for the various clients and on the cases. Such activities may include meeting with client, hearings and filing papers in courts.

You should have entered the list of possible activities and services you provide for your clients in the Operational Data Setup module as **Case Activities codes** in Chapter 2. Section 2. If you have not at this juncture, return to Chapter 2 Section 2 and enter the Case Activities Codes *(Start LAWMAN->Click Operational Data Setup -> Click Operational Information - > Click Case Activities Codes).*

7.1 Scheduling Activities, Reminders and Activities Search

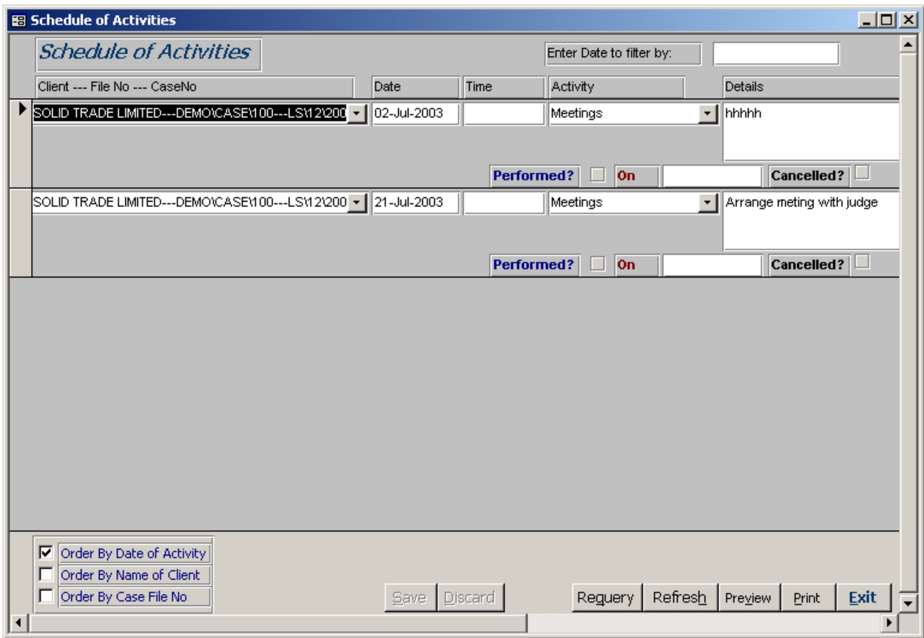
1. Click **Law Office Management** on the main interface.
2. Click **Work Schedulng** on the resulting interface. This displays the form **Scheduling of Legal Activities** (below) through which you enter tasks to schedule.

7.1.1 Scheduling of Activities

1. Click **Schedule of Activities** on the Scheduling of Legal Activities. This displays a form showing all pending schedule of activities complete with date to be performed and the counsel/staff responsible for its execution.
2. You can order the list by the client or by case, depending on your preference, by clicking appropriate option button on the bottom left hand corner of the form
3. Click **Add** to enter the activity to be scheduled.
4. Enter information as indicated in the text boxes
5. Click **Save**, to save the details
6. Click **Finish** to return to original state ready for new entry/modification

7. Click **Modify** to modify existing scheduled activity
8. Replace current information with new entries
9. Click **Save** to Save the Details
10. Click **Finish** to return to original state ready for new entry/modification

11. If a schedule has been performed, click the option flag labelled **Performed**.
12. This will remove the activity from the schedule (and put under **Scheduled Activities Performed**.)



If you want to see a full history of scheduled activities,

- Click Exit to return to previous interface
- Click **History of Scheduled Activities**.

7.1.2 Reminders of Scheduled Activities

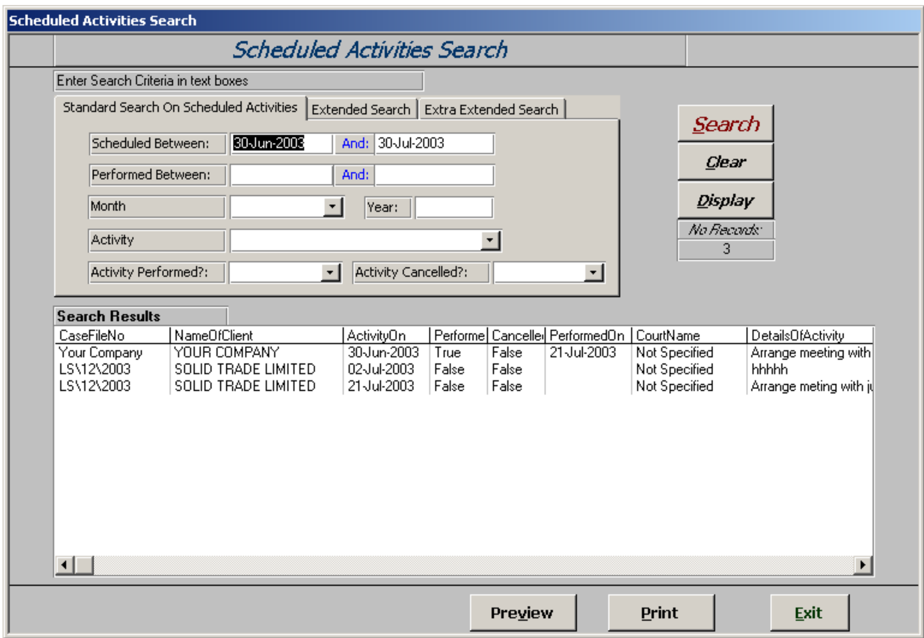
When you start LAWMAN you will be prompted of

- a reminder of activities to be performed in the future
- the work schedule for the day
- a list of scheduled activities that have been missed

You can also view these information while operating LAWMAN by clicking **Reminder of Pending Scheduled Activities** or **Scheduled Activities that have been missed** on the Scheduling of Legal Activities interface

7.1.3 Searching for Scheduled Activities

1. Click **Scheduled Activities Search** on the Scheduling of Legal Activities.
2. Enter **Search** criteria in the available text and combo boxes.
3. If required, extend the search by clicking **Extend Search** tab and enter extra criteria in the appropriate text boxes.
4. If Required, further extend the search by clicking **Extra Extend Search** tab and enter extra criteria in the appropriate text boxes
5. Click **Search** to display the search results on the list
6. Click **Preview** or **Print** to preview or print the report on the search results
7. Click **Clear** to clear the search criteria ready for another search.
8. Click **Exit** to quit the remove the interface from focus.



For example, if you want to search for activities scheduled between 5th of January 2003 and 6th February 2003 then, in Step 2

- Enter 30-Jun-2003 and 20-Jul-2003 in the text boxes labelled **Scheduled Between**
- Click Search and the activities that fall between the dates will be displayed in the list

If you want just activities involving court appearances within this period,

- Click **Extend Search** tab
- Select **Court Appearance** from the combo box labelled **Activity**

8 Searching for Information

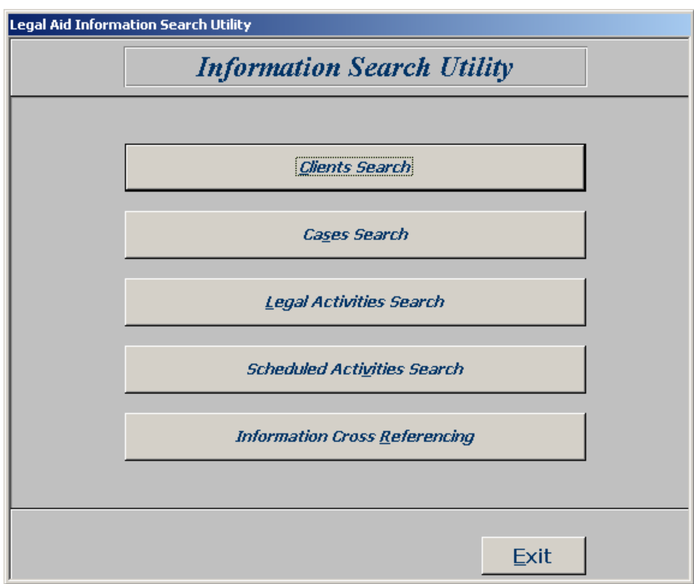
The Information Search utility is the ***search engine*** of Law Office Manager. It provides the user with the ability to search for information of various categories such as clients information, cases information and case activities. The ability to cross-reference a name search across various categories of information is also provided by the search engine.

In brief, the utility offers the following types of search

1. Clients Search
2. Cases Search
3. Legal Activities Search
4. Scheduled Activities Search
5. Information Cross-Referencing

To perform a search

1. Click **Law Office Management** on the main interface.
2. Click **Information Search** on the resulting interface. This displays the form **Information Search Utility interface** (below).
3. Click the type of search you want from the available choices

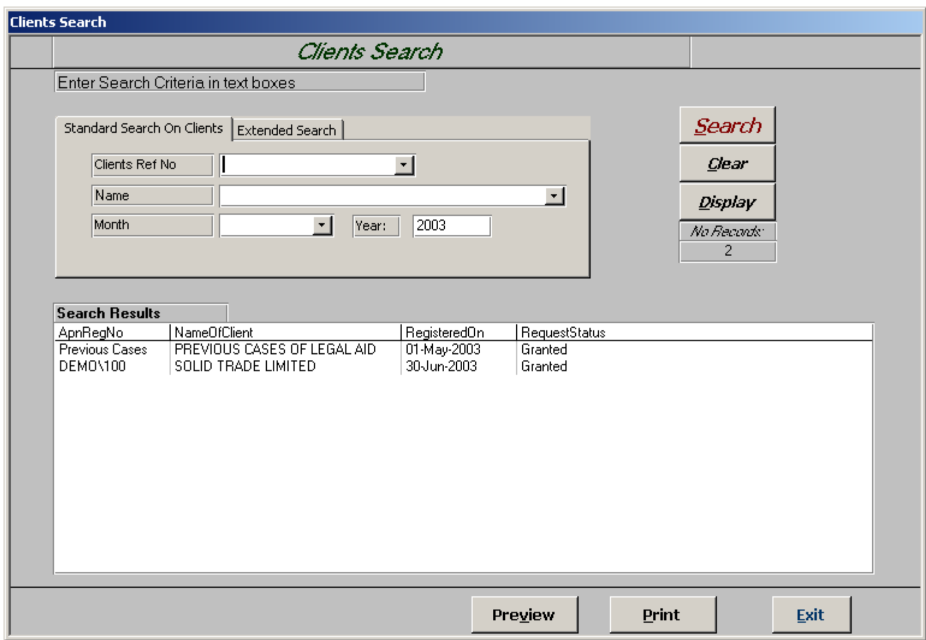


The appropriate interface will be displayed and you should enter your search criteria and execute the search. The procedures for the various types of searches are similar and will be dealt with in subsequent sections.

8.1 Clients Search

1. Click **Clients Search** on the Information Search form: This displays the interface below

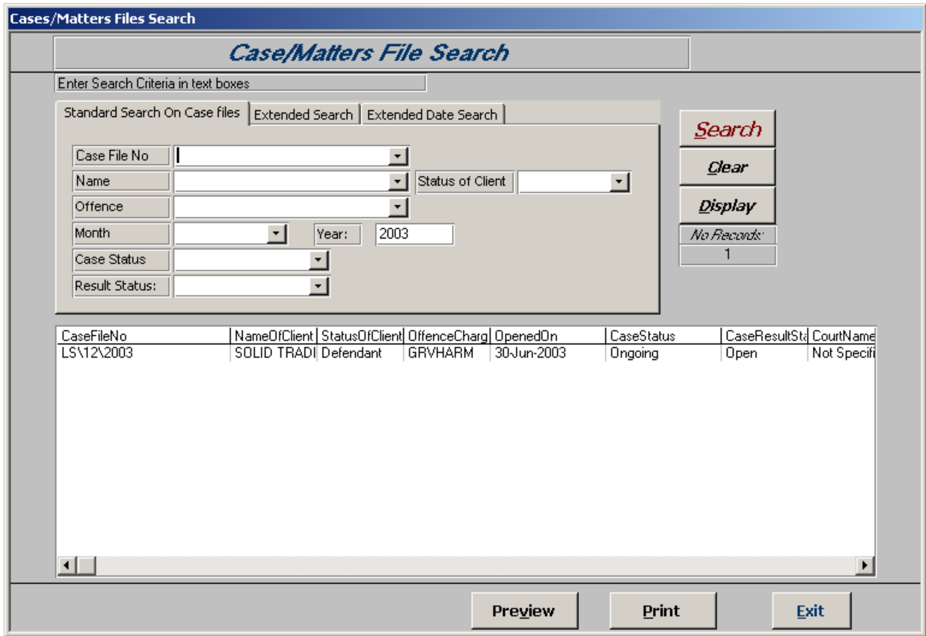
2. Enter/select information in the text boxes on the **Standard Search** tab to specify your search criteria
3. If required, Click **Extended Search** and enter information in the text boxes to extend your search criteria
4. Click **Search** to execute the search. The search results will be displayed as a list on the Search Results frame and you will be prompted with the number of records found.
5. Click OK to remove the message
6. Double-click on any of the search results record to view full details of the client
7. Click **Display**, to display appropriate interface showing the list or full details of all the search results.
8. Click **Preview** or **Print** to preview a report of the search result of the screen or print the report on your printer.
9. To clear the search criteria and prepare for your next search, click **Clear**.



8.2 Cases Search

1. Click **Cases Search** on the Information Search form: This displays the interface below
2. Enter/select information in the text boxes on the **Standard Search** tab to specify your search criteria
3. If required, Click **Extended Search** and enter information in the text boxes to extend your search criteria
4. Click **Search** to execute the search. The search results will be displayed as a list on the Search Results frame and you will be prompted with the number of records found.
5. Click OK to remove the message
6. Double-click on any of the search results record to view full details of the case.
7. Click **Display**, to display appropriate interface showing the list or full details of all the search results.
8. Click **Preview** or **Print** to preview a report of the search result of the screen or print the report on your printer.

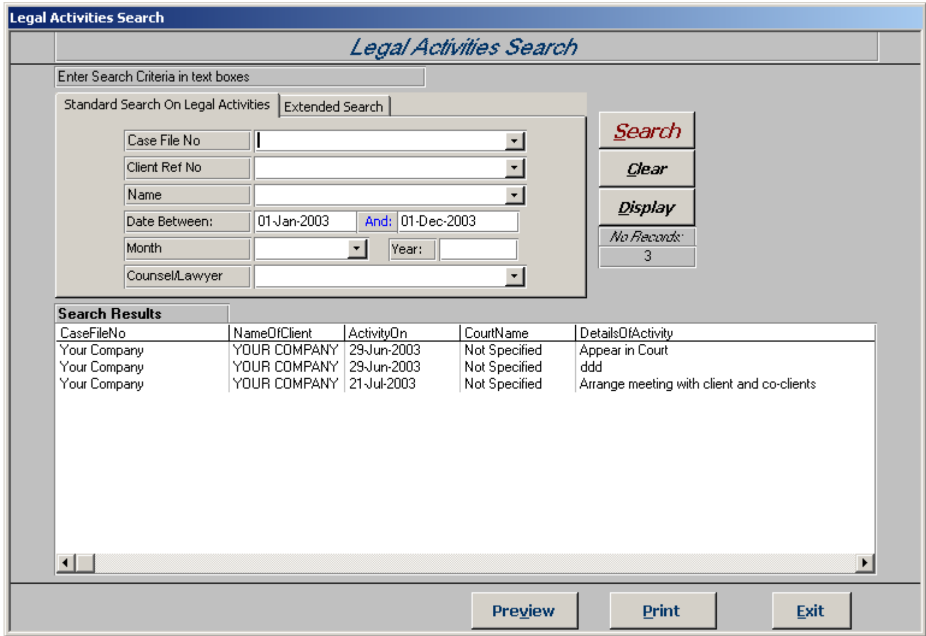
9. To clear the search criteria and prepare for your next search, click **Clear**.



8.3 Legal Activities Search

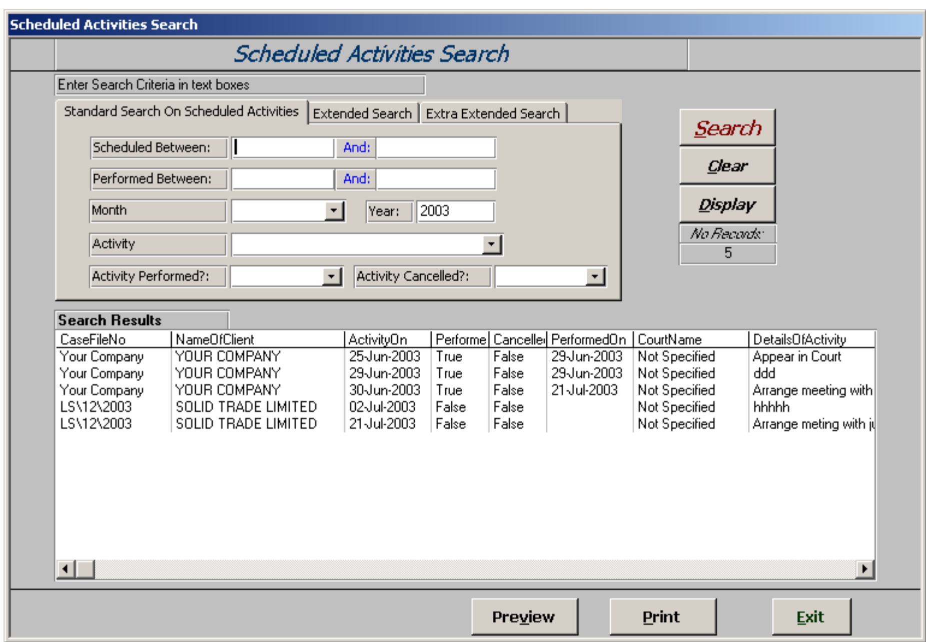
In this section your search is on the databank containing the history of activities/services you have rendered on your clients and cases. The procedure is also similar.

1. Click **Legal Activities Search** on the Information Search form: This displays the interface below
2. Enter/select information in the text boxes on the **Standard Search** tab to specify your search criteria
3. If required, Click **Extended Search** and enter information in the text boxes to extend your search criteria
4. Click **Search** to execute the search. The search results will be displayed as a list on the Search Results frame and you will be prompted with the number of records found.
5. Click OK to remove the message
6. Double-click on any of the search results record to view full details of the activity.
7. Click **Display**, to display appropriate interface showing the list or full details of all the search results.
8. Click **Preview** or **Print** to preview a report of the search result of the screen or print the report on your printer.
9. To clear the search criteria and prepare for your next search, click **Clear**.



8.4 Scheduled Activities Search

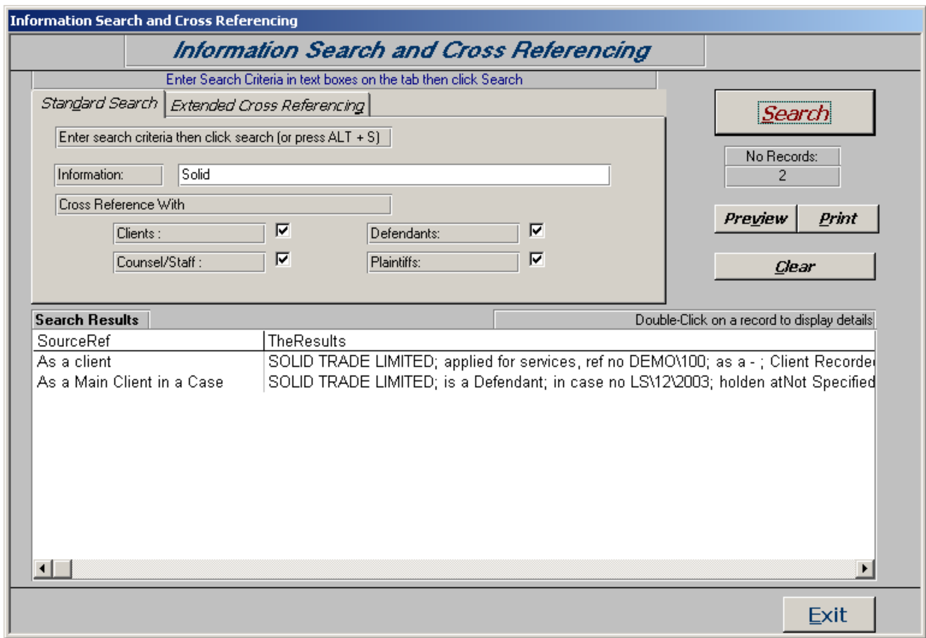
Involves searching on the history of activities/services that are scheduled including those pending and performed. This has been dealt with in Chapter 7.1.3. The procedure and interface is similar to that for Legal Activities search



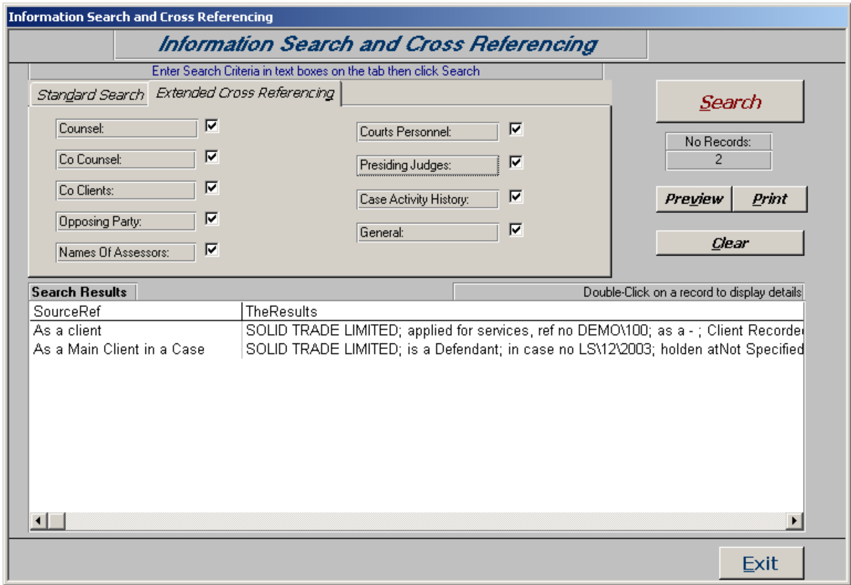
8.5 Information Cross-Referencing

The Information Cross-Referencing utility is a powerful utility that you employ to obtain a global view of an ***entity*** with respect to the activities of your firm. In any law practice, central to the activities are *entities* such as clients, plaintiffs, defendants, counsel and judges that form the bulk of your information. Thus, you may want to know for example if you have any information on a particular person or company and how that may have interacted with your firm in the past.

For example, what is the word "**Solid**" to your firm?. Is it a client, plaintiff, defendant or a firm of lawyers or a judge in any of your cases. This facility gives you the answer by cross-referencing "Solid" with all possible current and historical data in your databank.



1. Click **Information Cross Referencing** on the Information Search form: This displays the interface above
2. Enter the information that will form the basis of cross-referencing (e.g. "Solid" as in our example) in the text box labelled **Information** on the **Standard Search** tab.
3. If required, Click **Extended Cross Referencing** and click option button(s) indicating information you want to extend the cross-reference (see interface below).
4. Click **Search** to execute the search. The search results will be displayed as a list on the Search Results frame and you will be prompted with the number of records found.
5. Click OK to remove the message
6. Double-click on any of the search results record to view full details of the information.
7. Click **Display**, to display appropriate interface showing the list or full details of all the search results.
8. Click **Preview** or **Print** to preview a report of the search result of the screen or print the report on your printer.
9. To clear the search criteria and prepare for your next search, click **Clear**.


Information Search and Cross Referencing
Information Search and Cross Referencing
Enter Search Criteria in text boxes on the tab then click Search
Standard Search
Extended Cross Referencing
Counsel:
Co Counsel:
Co Clients:
Opposing Party:
Names Of Assessors:
Courts Personnel:
Presiding Judges:
Case Activity History:
General:
Search
No Records:
2
Preview
Print
Clear
Search Results
Double-Click on a record to display details
SourceRef
TheResults
As a client
SOLID TRADE LIMITED; applied for services, ref no DEMO\100; as a - ; Client Recorde
As a Main Client in a Case
SOLID TRADE LIMITED; is a Defendant; in case no LS\12\2003; holden atNot Specified
Exit

9 Reports

9.1 Standard Reports (Not Available in Standard Version)

When you click **Reports** on the Law Office Management interface, the **Standard Reports** interface (below) will be displayed.

You can quickly print or preview reports based on the year and/or month of preference. The choices are *Clients List, Defendants Particulars, Plaintiffs Particulars, Cases Opened, Cases Completed, Monthly Returns of Cases, Returns of Case by Counsel, List of Courts, List of Legal Staff and List of Offences.*

1. Enter the year of interest in the box labelled **Year**.
2. Optionally, Enter/Select the month of interest in/from the box labelled **Month**.
3. Click the button indicating the report to preview/print.
4. A preview of the report will be displayed on the screen.
5. To print the report
    a. Select **Print** from the **General** menu.

    OR

    a. press **Ctrl + P** on the keyboard if you want control over the pages or range of pages to print and of the printer to send the report.
    b. On the print interface displayed.
    c. Select the Printer.
    d. Enter or select the pages or range of pages.
    e. Click Ok to send the report for printing.

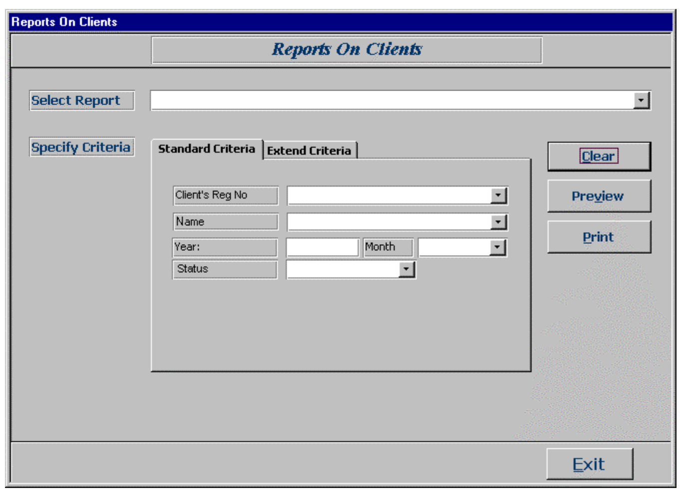
9.2 Advanced Reports (available as Reports in Standard Version)

With the Advanced Reports facility, you can print/preview reports for the specific Client(s), Case(s)/Matter(s) and Cases/Matters and Scheduled Activities, for example.

1. Click **Advanced Reports** (or Reports in Standard Version) on the Law Office Management interface, the **Advanced Reports** interface (below) will be displayed.
2. Click **Reports On Cases** or **Reports on Clients** or **Reports on Cases and Scheduled Activities** or **Reports on Diary Tasks** and **Reports on Trade Marks** and Patents as desired.

3. The appropriate interface will be displayed and you select the report, specify your criteria for printing and then print/preview the report.

9.2.1 Reports on Clients



1. Click **Advanced Reports** on the Law Office Management interface, the **Advanced Reports** interface will be displayed.
2. Click **Reports on Clients**. The interface above will be displayed.
3. Select the report from the list on the combo box labelled **Select Report**.

Reports on Clients
Cases Handled For Client
Clients Details - Brief
Clients Details - FullDetails
Clients Details - Standard
Clients List
Clients List Grouped by Year and Month
List of Counsel
List of Courts
List of Offences

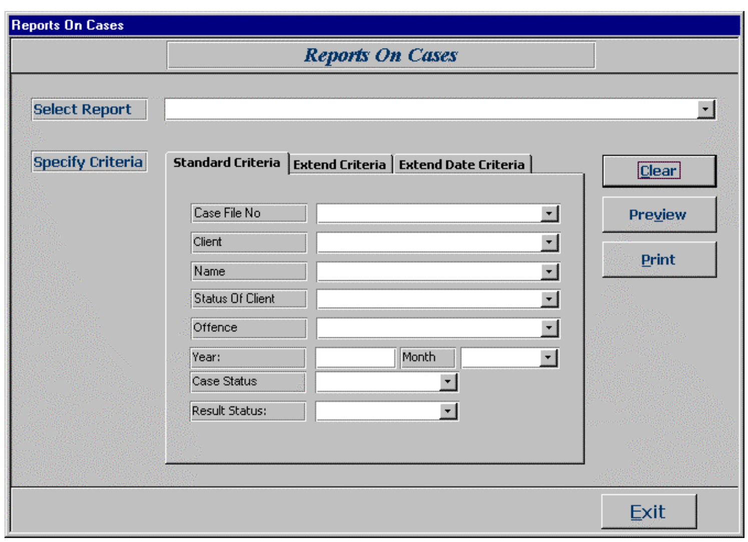
4. Specify your criteria on the tab labelled **Standard Criteria**.
5. If you want to extend the criteria further, click **Extend Criteria** tab and specify extra criteria on the available text boxes.
6. Click **Preview** to preview the report on the screen. You may be prompted to select from a list of choices of the report. Respond appropriately.
7. To print from this preview,
    a. Select **Print** from the **General** menu.

OR

   a. press **Ctrl + P** on the keyboard if you want control over the pages or range of pages to print and of the printer to send the report.
   b. On the print interface displayed.
   c. Select the Printer.
   d. Enter or select the pages or range of pages.
   e. Click Ok to send the report for printing.

8. Click **Print** to print report directly on the printer, without previewing.

9.2.2 Reports on Cases/Matters



1. Click **Advanced Reports** on the Law Office Management interface, the **Advanced Reports** interface will be displayed.
2. Click **Reports on Cases**. The interface above will be displayed.

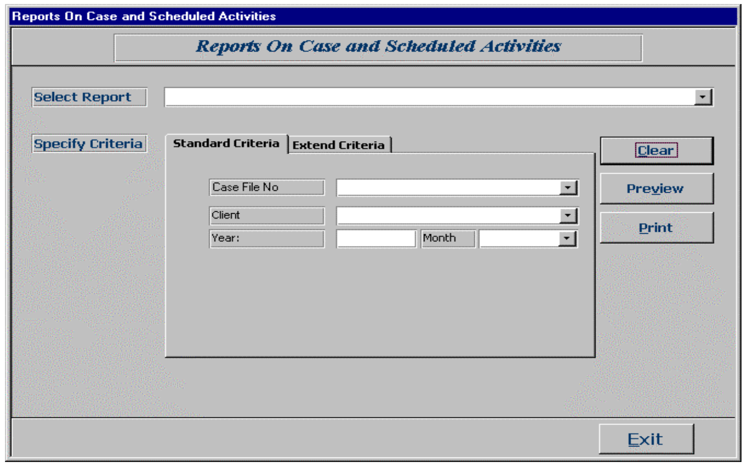
3. Select the report from the list on the combo box labelled **Select Report**.

Report on Cases
Accused Particulars List
Accused Particulars List (Grouped by Year,Location and Month)
Case Details - Brief
Case Details - FullDetails
Case Details - Standard
Cases Completed List (Grouped by Year,Location and Month)
Cases List
Cases List (Grouped by Case Status,Year and Month)
Cases List (Grouped by Results Status,Year and Month)
Cases List (Grouped by Year and Month)
Cases List (Grouped by Year,Location and Month)
Clients Particulars
Clients Particulars List (Grouped by Year,Location and Month)
List of Counsel
List of Courts
List of Offences

4. Specify your criteria on the tab labelled **Standard Criteria**.
5. If you want to extend the criteria further, click **Extend Criteria** tab and specify extra criteria on the available text boxes.
6. If you want to extend the date criteria further, click **Extend Date Criteria** tab and specify extra date criteria on the available text boxes.
7. Click **Preview** to preview the report on the screen. You may be prompted to select from a list of choices of the report. Respond appropriately.
8. To print from this preview,
    a. Select **Print** from the **General** menu.

   OR
    a. press **Ctrl + P** on the keyboard if you want control over the pages or range of pages to print and of the printer to send the report.
    b. On the print interface displayed.
    c. Select the Printer.
    d. Enter or select the pages or range of pages.
    e. Click Ok to send the report for printing.
9. Click **Print** to print report directly on the printer, without previewing.

9.2.3 Reports on Activities



1. Click **Advanced Reports** on the Law Office Management interface, the **Advanced Reports** interface will be displayed.
2. Click **Reports on Activities**. The interface above will be displayed.
3. Select the report from the list on the combo box labelled **Select Report**.

Reports on Activities (Standard)
Cases Activity History
Cases Activity History (Group By Case)
Cases Activity History (Group By Counsel)
Cases Activity History (Group By Year and Month)
List of Counsel
List of Courts
List of Offences
Reminder of Missed Scheduled of Activities/Tasks
Reminder of Scheduled Activities/Tasks
Schedule of Activities for Applicant/Client
Schedule of Activities for Cases
Schedule of Activities for Counsel/LegalStaff
Scheduled Activity History
Scheduled Activity History (Group By Application/Client)
Scheduled Activity History (Group By Case)
Scheduled Activity History (Group By Counsel/LegalStaff)
Scheduled Activity History (Group By Year and Month)

4. Specify your criteria on the tab labelled **Standard Criteria**.
5. If you want to extend the criteria further, click **Extend Criteria** tab and specify extra criteria on the available text boxes.
6. Click **Preview** to preview the report on the screen. You may be prompted to select from a list of choices of the report. Respond appropriately.
7. To print from this preview,
    a. Select **Print** from the **General** menu.

OR

    a. press **Ctrl + P** on the keyboard if you want control over the pages or range of pages to print and of the printer to send the report.
    b. On the print interface displayed.

c. Select the Printer.
d. Enter or select the pages or range of pages.
e. Click Ok to send the report for printing.

8. Click **Print** to print report directly on the printer, without previewing.

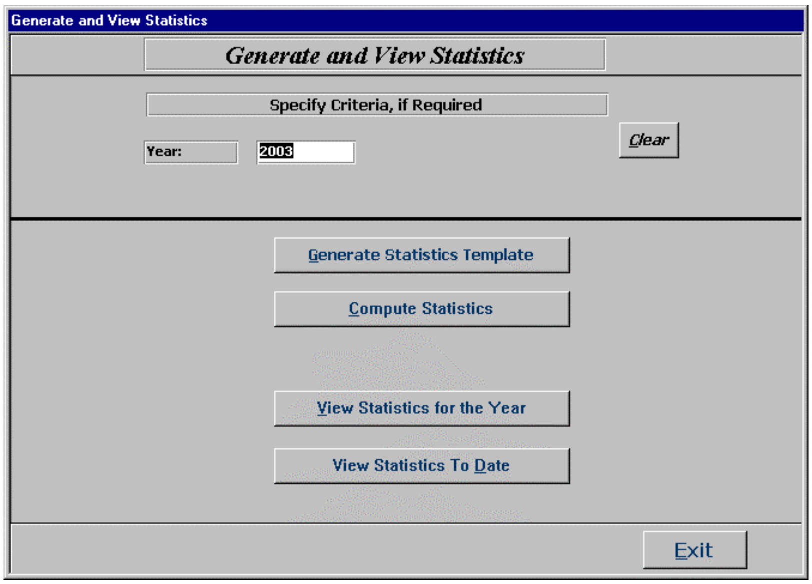
Reports on Diary Tasks and Reports on Trade Marks and Patents follow similar procedures.

10 Statistics

This facility is not available in standard and corporate versions.

10.1 Generating and Viewing Statistics

1. Click **Statistics** on the Law Office Management interface, the **Generate and View Statistics** interface will be displayed.
2. Enter the year for which you want to assess statistics in the box labelled **Year**.
3. Click Generate Statistics Template to prepare the template for which to compute statistics, if a template does not exist.
4. Click Compute Statistics.



10.1.1 Statistics for the year

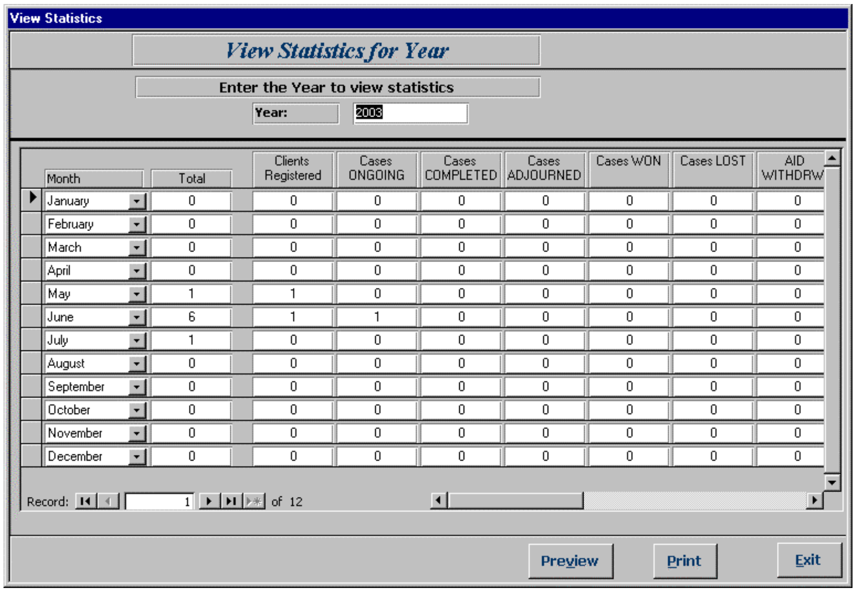
To display the statistics for the year,

1. Click **View Statistics for the Year** to display the statistics for the year on the screen (below).
2. Click **Preview** to preview the report on the screen. You may be prompted to select from a list of choices of the report. Respond appropriately.
3. To print from this preview,
   a. Select **Print** from the **General** menu.

   OR

   a. press **Ctrl + P** on the keyboard if you want control over the pages or range of pages to print and of the printer to send the report.
   b. On the print interface displayed.
   c. Select the Printer.
   d. Enter or select the pages or range of pages.
   e. Click Ok to send the report for printing.

4. Click **Print** to print report directly on the printer, without previewing.



View Statistics

View Statistics for Year

Enter the Year to view statistics

Year: 2003

Month	Total	Clients Registered	Cases ONGOING	Cases COMPLETED	Cases ADJOURNED	Cases WON	Cases LOST	AID WITHDRW
January	0	0	0	0	0	0	0	0
February	0	0	0	0	0	0	0	0
March	0	0	0	0	0	0	0	0
April	0	0	0	0	0	0	0	0
May	1	1	0	0	0	0	0	0
June	6	1	1	0	0	0	0	0
July	1	0	0	0	0	0	0	0
August	0	0	0	0	0	0	0	0
September	0	0	0	0	0	0	0	0
October	0	0	0	0	0	0	0	0
November	0	0	0	0	0	0	0	0
December	0	0	0	0	0	0	0	0

Record: 1 of 12

Preview Print Exit

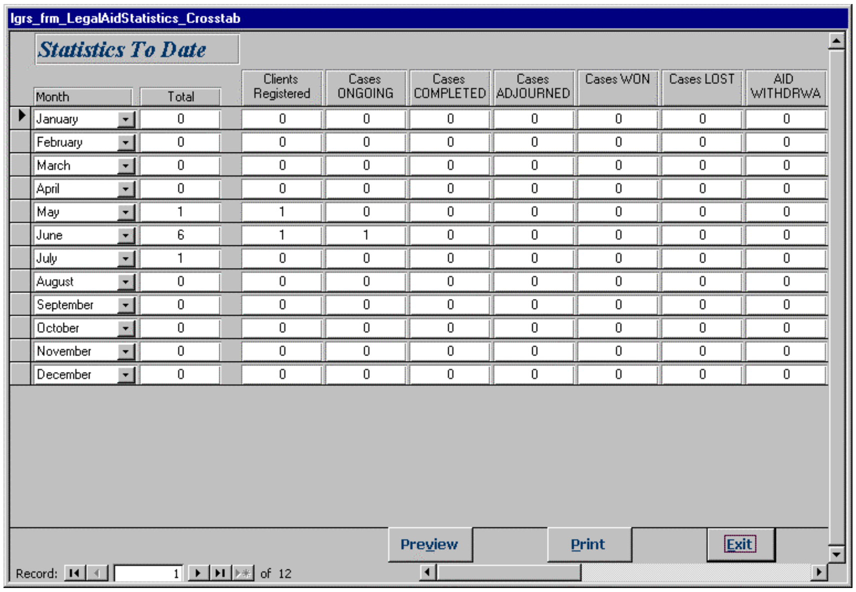
10.1.2 Statistics to date

To display the statistics to date,

1. Click **View Statistics to Date** to display the statistics for the year to date on the screen (below).
2. Click **Preview** to preview the report on the screen. You may be prompted to select from a list of choices of the report. Respond appropriately.
3. To print from this preview,
    b. Select **Print** from the **General** menu.

   OR

    a. Press **Ctrl + P** on the keyboard if you want control over the pages or range of pages to print and of the printer to send the report.
    b. On the print interface displayed.
    c. Select the Printer.
    d. Enter or select the pages or range of pages.
    e. Click Ok to send the report for printing.
4. Click **Print** to print report directly on the printer, without previewing.


lgrs_frm_LegalAidStatistics_Crosstab

Statistics To Date

Month	Total	Clients Registered	Cases ONGOING	Cases COMPLETED	Cases ADJOURNED	Cases WON	Cases LOST	AID WITHDRWA
January	0	0	0	0	0	0	0	0
February	0	0	0	0	0	0	0	0
March	0	0	0	0	0	0	0	0
April	0	0	0	0	0	0	0	0
May	1	1	0	0	0	0	0	0
June	6	1	1	0	0	0	0	0
July	1	0	0	0	0	0	0	0
August	0	0	0	0	0	0	0	0
September	0	0	0	0	0	0	0	0
October	0	0	0	0	0	0	0	0
November	0	0	0	0	0	0	0	0
December	0	0	0	0	0	0	0	0

Preview Print Exit

Record: 1 of 12

11 Financials: Invoicing and Managing Clients Accounts

Law Office Manager software provides the facility to generate invoices for your clients with the added facility to precisely itemise the activities and services you provided to the client relating to the invoice/bill.

Incorporated in the system is the facility to manage client's accounts with your firm, since it is common practice for law firms to handle financial transactions on behalf of clients. Comprehensive details of all financial transactions made on behalf of the client are recorded in history and balances of the account obtainable at an instant.

The procedures to perform these functions are straightforward, and are dealt with in this chapter.

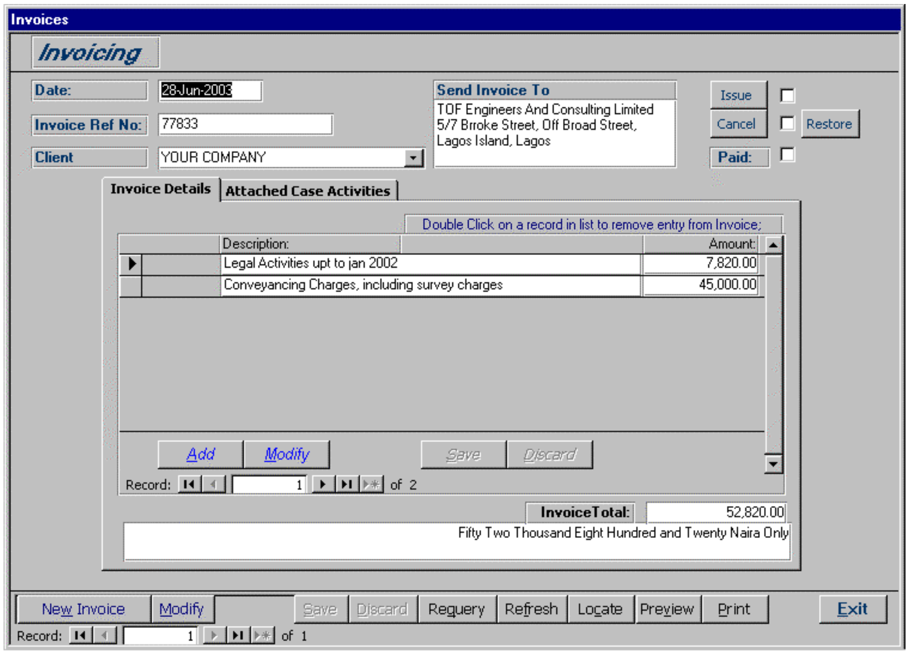
Click Financial on the Law Office Management interface to display the interface depicted below.

Observe the facilities

- **Invoicing**, to invoice clients
- **Clients Accounts and Statements** to directly charge and monitor clients accounts
- **Accounts Reports** for printing and previewing accounts reports

11.1 Invoicing Clients

The form/interface for creating invoices is depicted below. At a glance you can see that it is designed to itemise the details of charges and an itemised list of the services you have provided relating to the bill. The invoice total is also automatically converted into words ensuring clarity and authenticity of you bill.

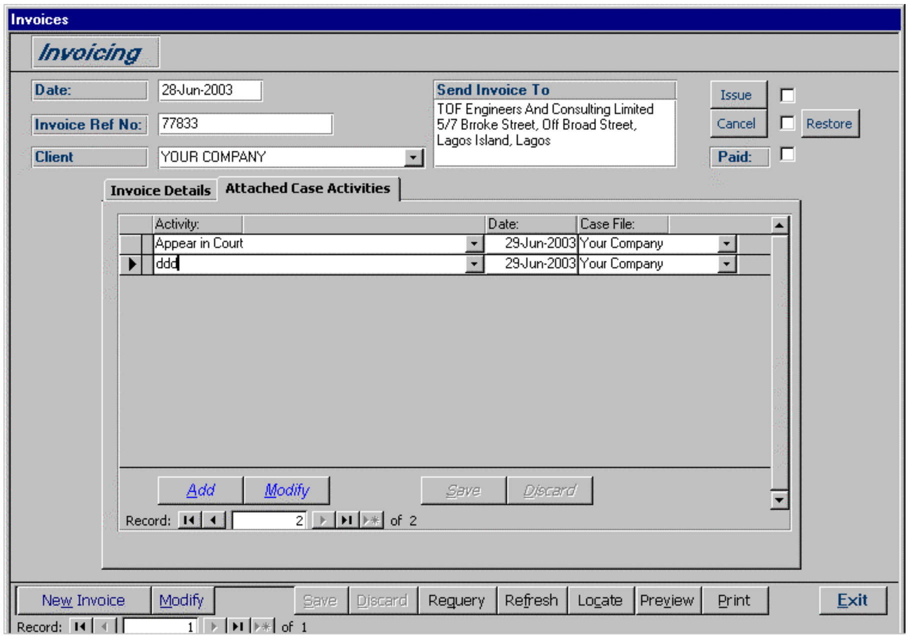


11.1.1 Raising Invoices

To raise an invoice for a client:

1. Click **Financials** on the Law Office Management interface
2. Click **Invoicing** from the resulting interface. This displays the Invoicing form (above)
3. Click **New Invoice** to create a new invoice
    a. Enter **Date** of invoice, **Invoice Ref No**, **Client** Name and where to send invoice to (if different from client)
    b. Click **Save** to save the invoice.
4. To add itemised list of the invoice details
    a. Click **Add** on the **Invoice Details** tab
    b. Enter the **Description** of the invoice item
    c. Enter the **Amount**
    d. Repeat for all the invoice details.
5. To record all the legal services and activities that make up this invoice, Click **Attach Activities** tab (see form below)
    a. Click **Add** on the Attach Activities tab
    b. Enter/Select the activities on the combo box for all activities you want to record (Note that only activities relating to the client will be selectable)
    c. Click **Save** to save the entry
    d. Repeat for all activities to attach
6. You can print or preview the invoice in focus by clicking **Print** Or **Preview**.

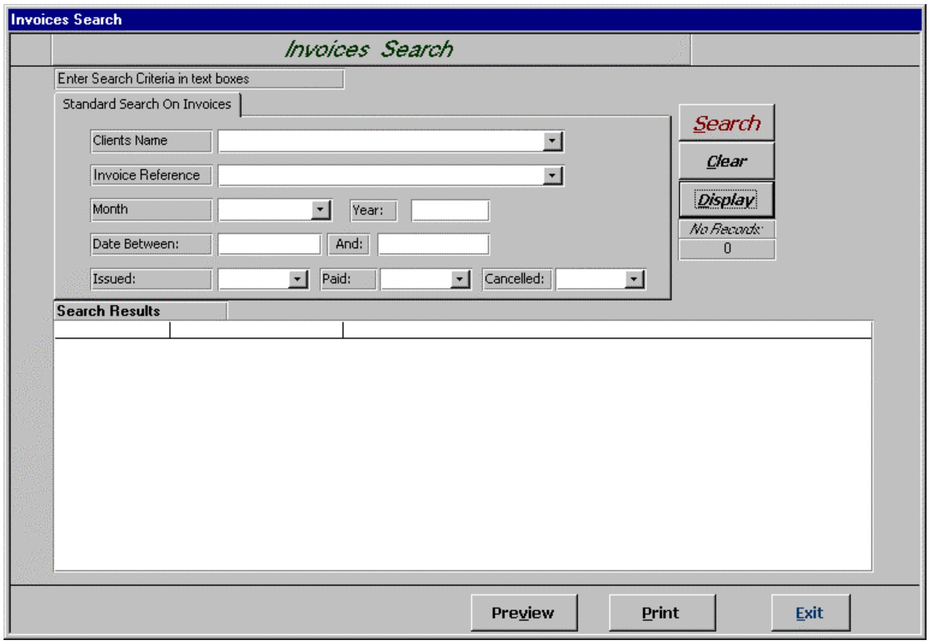
You follow similar procedure to modify existing invoice details, by locating/moving to the invoice of interest, click Modify and proceed to change existing details.



11.1.2 Searching Invoices Databank

This provides a search engine for invoices and is similar to the searches (for clients, cases and activities) dealt with in earlier chapters.

1. Click **Financials** on the Law Office Management interface
2. Click **Invoices Search** on the resulting interface to display the **Invoices Search** form (below)
3. Enter the search criteria in the text boxes on the **Standard Search On Invoices** tab.
4. Click **Search** to display the search results on the Search Results list
5. To view full details on any invoice, Double-Click on the particular invoice on the list.
6. Click **Preview** or **Print** to preview or print the report on the search results
7. Click **Clear** to clear the search criteria ready for another search.
8. Click **Exit** to quit the remove the interface from focus.



For example, if you want to search for invoices raised for a client.

1. Enter/Select the clients name in the box labelled Clients Name
2. Click Search and the results will be displayed on the list along with the number of invoices found.
3. Double-click on any invoice on the list to see full details.
4. OR Click **Print** or **Preview** to print or preview the reports on the invoices found
5. OR Click **Display** to display the invoices on form on the screen.

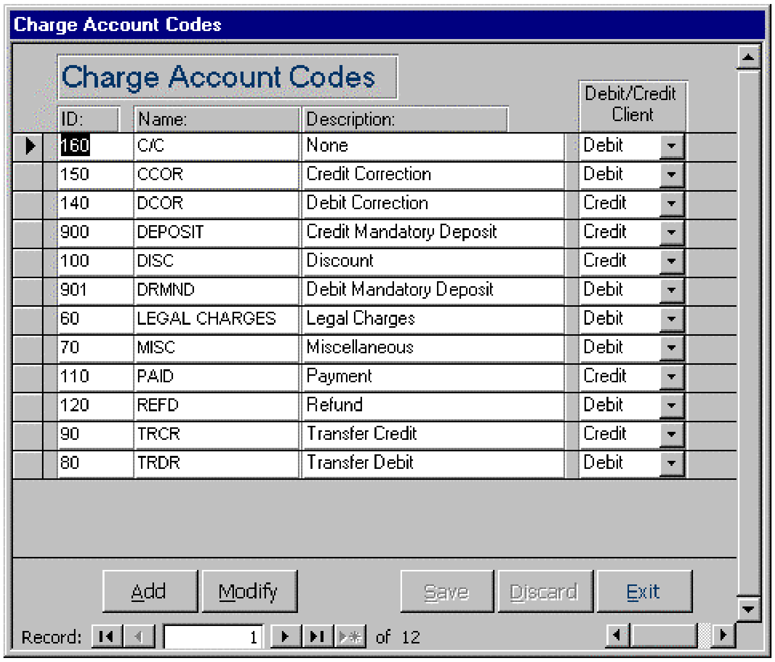
11.2 Managing Clients Accounts

Every financial transaction done on behalf of the client is recorded in your databank to ensure integrity of information in client's financial statements with your firm. Each transaction is stamped with a charge code, instrument type, date and the details of the transaction. The charge codes and instrument types should have been entered into your system via the Operational Data facility dealt with in Chapter 2.

You can add to these charge codes and instrument types, if required, via

- Main Interface -> Operational Data -> Operational Information -> Charge Codes
- Main Interface -> Operational Data -> Operational Information -> Financial Instrument

The respective forms, with standard entries, are depicted below.



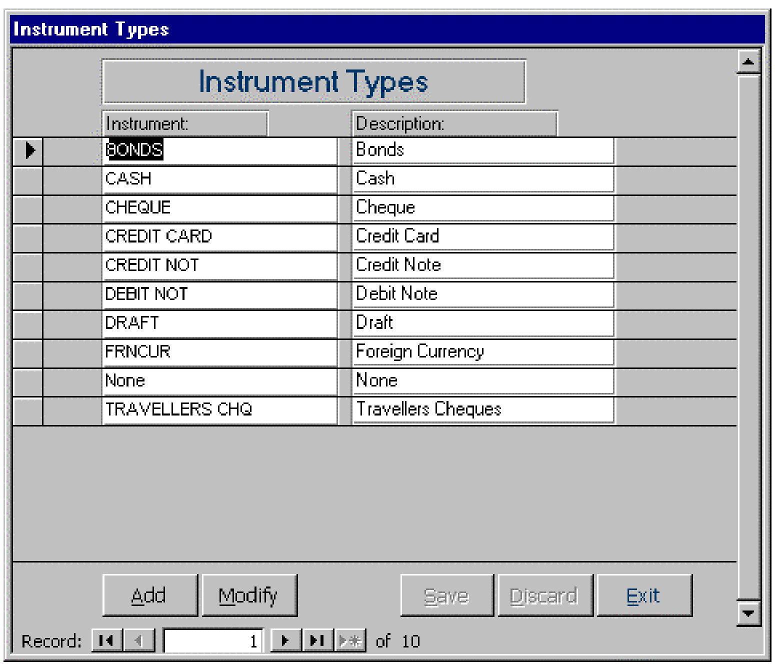
Charge Account Codes

Charge Account Codes

ID:	Name:	Description:	Debit/Credit Client
160	C/C	None	Debit
150	CCOR	Credit Correction	Debit
140	DCOR	Debit Correction	Credit
900	DEPOSIT	Credit Mandatory Deposit	Credit
100	DISC	Discount	Credit
901	DRMND	Debit Mandatory Deposit	Debit
60	LEGAL CHARGES	Legal Charges	Debit
70	MISC	Miscellaneous	Debit
110	PAID	Payment	Credit
120	REFD	Refund	Debit
90	TRCR	Transfer Credit	Credit
80	TRDR	Transfer Debit	Debit

Add Modify Save Discard Exit

Record: 1 of 12



Instrument Types

Instrument Types

Instrument:	Description:
BONDS	Bonds
CASH	Cash
CHEQUE	Cheque
CREDIT CARD	Credit Card
CREDIT NOT	Credit Note
DEBIT NOT	Debit Note
DRAFT	Draft
FRNCUR	Foreign Currency
None	None
TRAVELLERS CHQ	Travellers Cheques

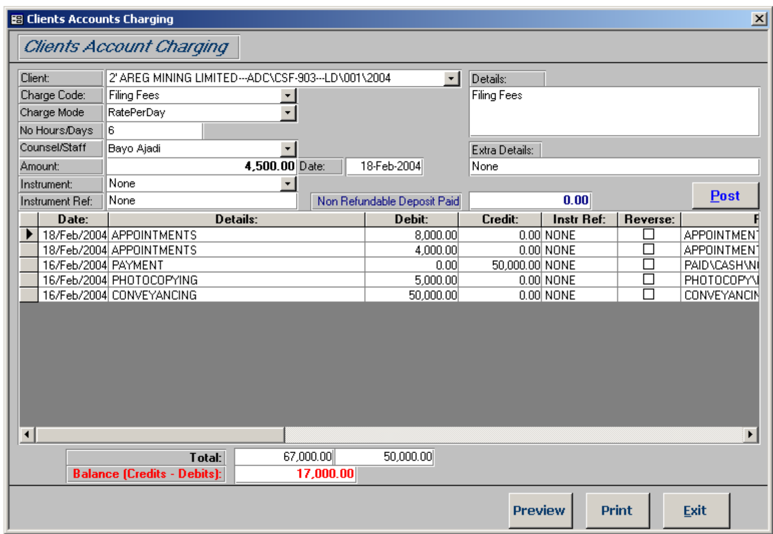
Add Modify Save Discard Exit

Record: 1 of 10

11.2.1 Charging Clients Accounts

9. Click **Financials** on the Law Office Management interface
10. Click **Clients Accounts And Statements** on the resulting interface to display the **Client Account Charging** form (below)
11. Enter/Select the client from the box labelled **Client.** The list of all transactions of the client and the balance on the account will be displayed.
12. Enter/Select the charge code from the box labelled **Charge Code**
13. Enter the **Date** of transaction (if different from the default shown)

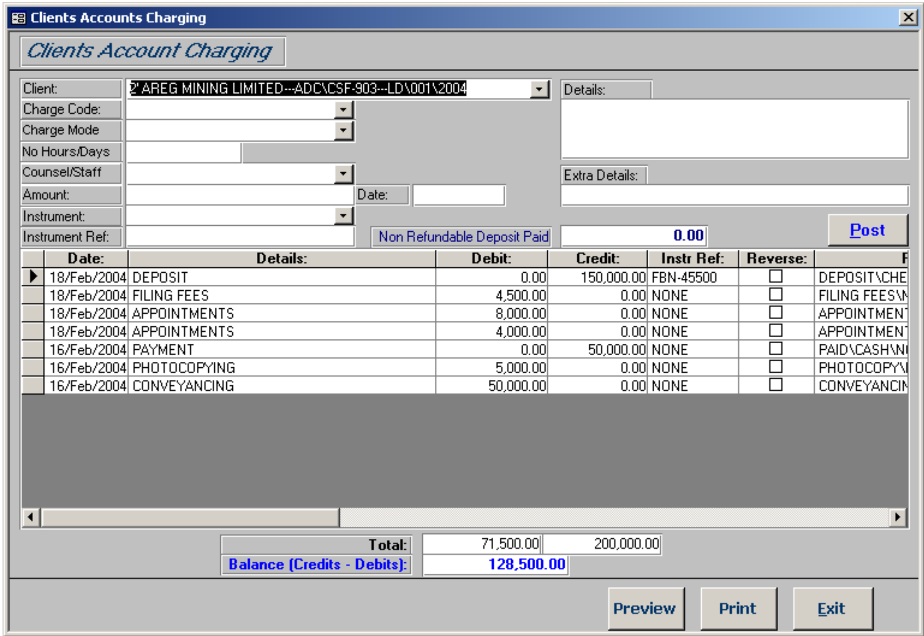
14. Enter the **Amount**
15. Enter the instrument type in box labelled **Instrument**
16. Enter the instrument reference number in **Instrument Ref** (eg, cheque no, draft no, invoice number)
17. Enter the details of the transaction in box labelled **Details**
18. If required, enter miscellaneous details in **Extra Details**
19. Click **Post** to update the client's account.
20. The transaction will appear immediately on the list and the balance on the account automatically updated.
21. As usual you can print or preview the client's account report by clicking **Print** or **Preview** and follow the usual steps to generate the report.



For example if 2' AREG MINING LIMITED deposited N151,000.00 with you with Cheque No 34002

1. Select 2' AREG MINING LIMITED from Client
2. Select DEPOSIT as the charge code
3. Enter 255000.00 as Amount
4. Enter Cheque and Instrument and 34002 as Instrument ref
5. Enter DEPOSIT FOR ACCEPTANCE OF BRIEF as Details
6. Click **Post**.

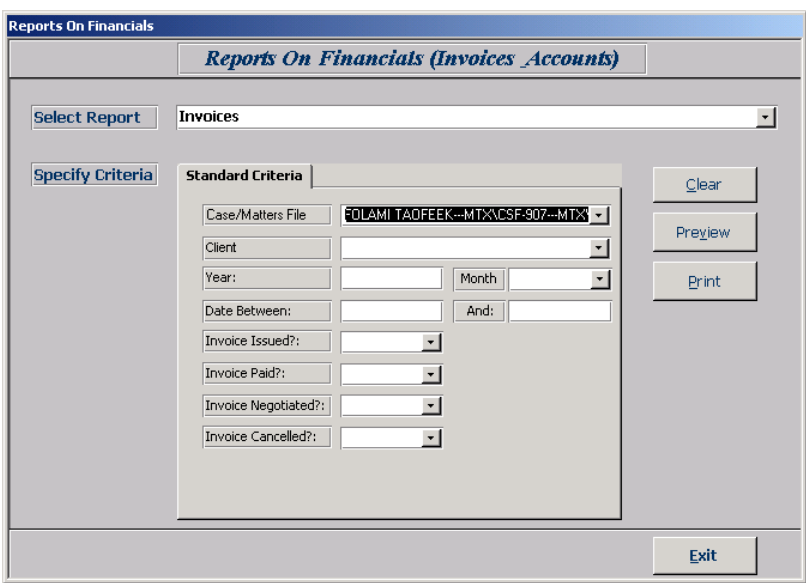
See interface below



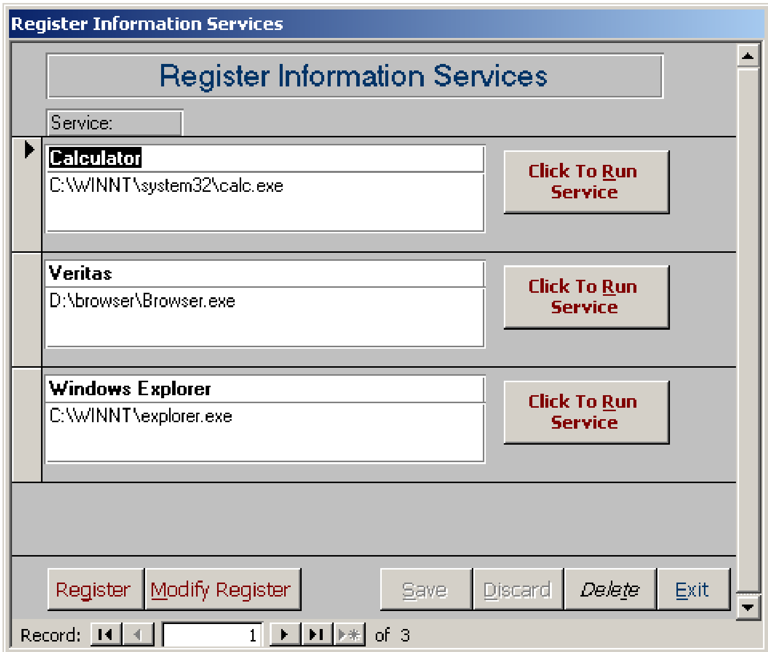
11.3 Accounts Reports

You can view all financial reports from this facility.

1. Click **Accounts Reports** on the Financials interface
2. Select the reports to preview or print.
3. Select and/or enter the criteria to filter the report by specifying on the **Standard Criteria Tab.**
4. Click Preview or Print to preview the report on the screen or print the report on the printer.



12 Other Services



An extension to LAWMAN is the capability to launch applications external it without having to exit LAWMAN. This facility is provided via the Information & Library Services utility, through which you register the service (e.g. law reports and indexes on cds, library information service such as a library automation software or the Internet etc).

1. Click **Information & Library Services** from the Law Office Management interface.
2. Click Register to register a new service.
3. Enter the service
4. Enter \ Locate the link to the service.
5. Click Save and the Finish.
6. To modify, click Modify Register and follow steps 3-5.
7. To launch the service click “Click to Run Service” by the service you require