READ ME - Cudgel®45.617DemoX

Welcome to Cudgel® with CalendarEye, Client Portrait, and Cadence.

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1. DEMO QUICKSTART

This Demo version has a few records of sample data, so you can see how most functions work.The Demo version uses QSA Toolwork's Helix Engine demo version, so it may quit after 60 minutes or so and is limited to 30 records per relation. When you purchase Helix Engine, Helix Rade, or Helix Server/Client, QSA will provide you with an Enablement Key and Serial Number; the fully registered versions of Helix do not have the demo limitations. Cudgel requires a Macintosh operating system, currently at least Mac OS 10.5.

• Transfer <Cudgel®45DemoX>, <Helix Engine>, and <Helix Help> to your hard drive. Helix Engine should be v 6.1.7 or later

• Double-click Helix Engine• File menu> Open> Cudgel®DemoX• Login Information> Username> Demo [Leave Password blank] > OK • Demo menu> Welcome to Cudgel®

• Welcome to Cudgel®> Cudgel Topview [Brain button] Shows some of Cudgel's many easy functions. Click on TopView icons if you want to see some views immediately.

• Welcome to Cudgel®> Cudgel Helps You Setup.• Complete reading this ReadMe• Welcome to Cudgel®> Cudgel Topview> Help> Manual

If you want to read part of the Manual. Start with the A- About pages, Then the B-Basic pages. This demo pdf manual is static; once Cudgel is launched in Helix the Cudgel Manual (and associated Help Hints) are dynamic.

2. CUDGEL GIVES CALENDAR, CLIENT AND CASE CONTROL FROM A TO Z.

Cudgel, with CalendarEye, Client Portrait, and Cadence, software is a powerful, structured, flexible data environment in which attorneys and other professionals can place much of their work data and from which they can readily retrieve that data, automatically create intelligent short letters, and gain control over calendar, client marketing, and cases. Cudgel is designed to accommodate single and multi- user firms, newer computer users and power users.

CalendarEye gives its users perspective over commitments by managing workflow with target, start, due, grace dates. Its WhyTime simply structures complex deadline rules of diverse jurisdictions, while Mapper graphically displays clients, matters, cases by jurisdiction. For each matter, readily see the last and next required actions and the responsible staff person. CalendarEye helps to monitor and maintain government registrations of diverse venues from county to country— trademarks, patents, designs, copyrights, customs, FDA, and more.

Client Portrait's **hierarchical design efficiently organizes complex corporate** contacts—personal contacts, secretaries, parent and sibling corporations, subsidiaries, affiliated businesses, partnerships, trusts, name changes, mergers, and acquisitions. With user defined groups, Client Portrait eases firm marketing, identifies potential conflicts of interest, prints multi-lingual form letters, exports to Palm PDA, and provides for Myers Briggs personality descriptions.

Comprehensive, patented simplicity. Most professionals will benefit from GreenLight's integration of efficient computer techniques, traditional management approaches, and today's marketing concerns. Litigators gain more. Patented litigation companion coordinates dates, pleadings, citations, facts, laws, costs, more, while helping evaluate evidence and witnesses. For many matters only the basic

Cudgel data is needed. As a case develops the user-friendly additional data structures and links are available. "It's hard enough keeping track of evidence and cases in the early stages of a lawsuit," Cudgel's designer Dr. Daniel Kegan explained. "Keeping paper lists current and neat during trial can be a miracle. With Cudgel, an attorney has easier access to the multidimensional matrix of litigation information, and with the famous

Macintosh user interface, even under the heat of trial, attorneys can keep organized. Moreover, they can use the same Cudgel companion to prepare for trial, at trial—local rules permitting, and for appeal."

Five Concurrent User License, Guarantee. GreenLight 30- day moneyback guarantees its products to work as it describes them. The basic Cudgel license includes five concurrent users. Cudgel 6 X require at least Macintosh OS 10.7 (Lion) and a separate Helix license: stand alone and multi-user Helix licenses are available from QSA Toolworks, <http://www.qsatoolworks.com>. Major discounts available to members of MacLaw, American Bar Association, International Trademark Association, Copyright Society of the USA, AIPLA, and voluntary state and local bar associations.

Cudgel Challenges Others. Can you easily distinguish your client John Smith Co (Delaware corporation, Illinois address) from your adverse party John Smith Co (IL corp, WY address), from Dr John Smith the expert witness in the case. Client Portrait® can. Can you flexibly show due dates where the law was amended March 1, 1989 and due dates differ depending whether the trigger event occurred before Nov 16, 1989 or after Nov 14, 1989? CalendarEye® can. Can you consistently manage both the small, brief settlement and the large, extended dispute—from initial investigation through discovery and trial, through appeal—dates, pleadings, witnesses, case authorities, evidence, motions, jurors, costs, notes. Cudgel® can.

Helix relational database environment, published by QSA Toolworks, initially launched in 1984, has grown from early client-server, multi-user versions to its current sophisticated features, with referential integrity and, for the power user, powerful technology with iconic programming; <http://www.qsatoolworks.com>. GreenLight provides its non-demo software as open architecture, making available the seven structural icons and 100 programming tiles of the full Helix customization environment.

Cudgel is designed for the sophisticated and user friendly Macintosh (Intel chips) and Helix platforms, and isn't now available for Windows. If calendar, client, or case control is important, Windows users should consider adding a Macintosh Intel computer with Cudgel to their firm. See Apple's Why Switch to a Mac, <www.apple.com/getamac/>. Windows users can also download, and read much of the documentation.

Data structures, from A to Z, and functions include Actors-Clients,

Adverse Parties, Witnesses; Billing; Cites-

Cases, Statutes, & other Authorities; Dates-case facts, docket deadlines; Evidence, Exhibits, Custody Chains; Facts-what you have to prove, disprove; Groups- for marketing, client bulletins; Help Hints online; Issues- the "whether" you must prove ; Jury-Voir Dire & trial notes; Law-Points of Law, with citation; Matters-track each pending motion in the case; Notes- Electronic refrigerator magnets; Orders-by the Court; Papers- Pleadings, Discovery/ Disclosure; Questions-for depositions or testimony; Rulings- trial objections & motions; Scripts-case, transactional, & firm form letters; Theme- cluster your client's cases by product; Unit-Track the way you structure your practice; Vitals-monitor each file, with critical dates; World- Follow different countries, or counties; XRef, CrossReference Numbers; YTime, Structure for deadline rules; Zone-Know the location of exhibits, files.

Functions include Flexible Reporting; Fixed & User Defined Sorts; GreenLight Open Architecture; Simple Task Timer and Invoicing; Client- Server, 5 concurrent Cudgel user license; Multi-lingual form letters

GreenLight software is designed for the busy professional, to get them going with fast, flexible, and friendly management tools. Initially developing software for attorneys since 1984, GreenLight products can also be used by accountants, consultants, educators, commercial real estate firms, and related professionals.

Daniel Kegan, PhD, JD, a trademark, copyright and computer law attorney, organizational psychologist, and management consultant, designs GreenLight software and serves as counsel to other counsel; <http://www.keganlaw.com>. Dr. Kegan began personalized data base programming three decades ago. He has written dozens of computer programs and scores of research and popular articles including Reducing the People Problems of Law Office Computerization, Avoiding Legal Problems When Marketing, and Cudgel: My Litigation Companion,Winning with Computers: Trial Practice in the 21st Century (ABA).

Cudgel v1 received Sophistication 10, Ease of Use 10 ratings from Computer Counsel, which also found Cudgel an "excellent weapon for organizing and retrieving case information... Litigation attorneys will love Cudgel's ease of use, power and versatility." The dictionary defines "cudgel" as a short, heavy club. With today's competitive, complex environments, Dr.

Kegan recommends professionals "speak softly and carry Cudgel®."

3. DEMO DOWNLOAD AND INSTALLATION

This Cudgel® demonstration package is available online.

Windows users can also download, and read much of the documentation and bonus material. However, to run the Cudgel application requires a Macintosh operating system.

NOTE TO WINDOWS USERS. For several years now, Apple's Macintosh computers have Intel central processing units (CPU or chips) and thus, with a licensed copy of Windows operating system, can run Windows applications as well as the many Macintosh applications. Some reviewers have found Windows applications run better and faster on Macintosh hardware than on conventional PCs.

If you received an optical disk, CR-ROM, from GreenLight, drag the GreenLight folder from the distribution disk icon to your computer's desktop.

Before installing new software, it is prudent to check your hardware and software with a utility program, such as Disk First Aid, Tech Tool Pro, or Disk Warrior. Also ensure you have a good backup on separate media.

Windows users can download the documentation and bonus extras, but need not download Cudgel®45.617-DemoX, Helix Engine Demo, and Helix Help—these applications currently require the Macintosh Operating System (Mac OS 10.6 or higher).

If you already have Helix (at least v 6.1.5) installed on your computer, you may delete the Helix demonstration icons. (If you do not delete the Helix demo icons and double-click Cudgel, your full Helix or the demo Helix program may launch.)

Cudgel@DemoX is limited to 30 records in many critical relations and is time limited; after 30 days from first installation it may intermittently behave erratically. Helix Engine (Demo) is limited and automatically quits after 60 minutes of use—you may restart; the full Helix program is not so limited. The full Cudgel® product does not have these demonstration limits; usage is limited only by your hard drive and the generous Helix specifications.

You may also learn more about QSA's Helix at

<http://www.qsatoolworks.com/product/>. You may directly download QSA demo Helix applications from <http://www.qsatoolworks.com/product/demoreq.html>
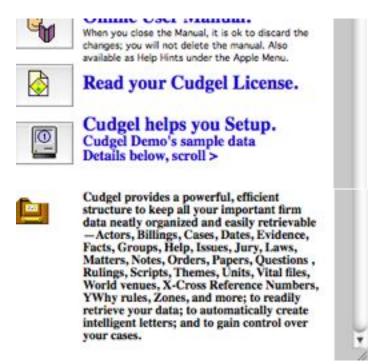
See DEMO QUICKSTART (#1, above) for launching and starting Helix and Cudgel.

Standalone, single users will use Helix Engine (or Helix RADE). Multiuser non- demo versions will use Helix Server and Helix Client; Cudgel remains operable as a single user system when the Cudgel collection is not being used by multiuser Helix.

After successful installation, store the GreenLight distribution disk in a secure place. Remember that computers are physical objects subject to error; frequently backup your data on separate media; routinely run your Helix collections through the Helix utilities.

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Online User Manual:
When you close the Manual, it is ok to discard the changes; you will not delete the manual. Also available as Help Hints under the Apple Menu.

Read your Cudgel License.

Cudgel helps you Setup.
Cudgel Demo's sample data
Details below, scroll >

Cudgel provides a powerful, efficient structure to keep all your important firm data neatly organized and easily retrievable — Actors, Billings, Cases, Dates, Evidence, Facts, Groups, Help, Issues, Jury, Laws, Matters, Notes, Orders, Papers, Questions , Rulings, Scripts, Themes, Units, Vital files, World venues, X-Cross Reference Numbers, YWhy rules, Zones, and more; to readily retrieve your data; to automatically create intelligent letters; and to gain control over your cases.

4. EXPLORING THE CUDGEL® DEMONSTRATION SOFTWARE

Under the Demo menu, choose WELCOME TO CUDGEL®. There are several ways to explore Cudgel.• Read the User Manual, especially the About section, for an overview of Cudgel.

• Explore the TopView sequence buttons, which demonstrate over 50 Cudgel views.• Under the Demo menu, choose DEMO_MORE_MENUS, which gives Demo user access to most menus.

• Launch the CaseBook, which shows several common reports used for case management.• Under the Demo menu, choose SETUP PANEL, step-by- step iconic button guides to customization.• Under the Demo menu, choose START, which describes customizing Cudgel for you and your firm.• You can always return to the WELCOME and the TOPVIEW views, under the SET or DEMO menus.

Read the GreenLight Cudgel® Demo License (button on the Welcome view;if the license doesn't appear: View> Find First).Send GreenLight your Feedback (An easy form is under the Demo menu). Order the full Cudgel® software without the Demo limitations (under the Demo menu, choose Yes!)

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5. CUDGEL IS A POWERFUL, FLEXIBLE STRUCTURE, NOT A GAME.

Cudgel with CalendarEye and Client Portrait is not a game, it does not do anything by itself; it is not a demo slideshow. Cudgel is a powerful, structured, flexible data environment in which you can place much of the data you encounter and from which you can readily retrieve that data, automatically create intelligent short letters, and gain control over your cases, calendar, and client marketing.

The more you read the Cudgel and Helix manuals, the more you can do, and do more easily. Or just explore with the menus and demo panels; it's only software and sample data.

CudgelDemoX ships with two sample cases and a few sample actors, dates,matters, and the like. Sample actors include Michael Heinlein Smith of Groking Endeavors, Robin Clark Kent, Daniel Webster II, Otto Schmink, Adolph Entropy, Magistrate Solomon; the two sample cases are Alpha Centori v Zed Co and Alpha Centuri v Havoc Enterprises.

WARNING. The data that ship with Cudgel may be fictitious and/or out of date. Do not rely on any of the data (from address, phone number to case holding or citation) initially included; it is provided only as a tutorial within Cudgel.

GreenLight's products are user-friendly, open architecture. However, if you don't want to bother with setting up the software for your particular use (inserting your firm name, defining the major areas of your practice, building a library

of form letter scripts) diverse consultants can assist you: Elan Associates, Helix developers, and others. With current phone and Internet communication, your consultant need not be geographically close. While consultants are available, GreenLight generally recommends users read the Cudgel manual, follow the Start guide, start with the major simple functions, and expand as comfort and need suggest.

The Welcome to Cudgel® Demo view presents **five ways to explore Cudgel. First,** Cudgel Topview shows over fifty features grouped in five categories: CalendarEye, Client Portrait, Cudgel, Cadence, and Help. We suggest you interact with Cudgel, simulate getting a new client and case, and

add some of your own data.

Second, the Warning and Icon Symbols view displays fifty common icons keyed to upcoming deadlines, client issues, statutes of limitations, and data posting.

Third, the Online User Manual describes Cudgel operation in 26 chapters.

Fourth, CaseBook shows common reports for a case— CaseBooklet shows Case Actors, Billings, Cites & Lines, Dates Marker, Exhibits, Papers, and VTabs; CaseBook opens 25 views.

Fifth, explore the Cudgel Start (textual description) and Setup Panels (29 icon- guided steps to set up your Own Firm, Actors, Work, Customize, Files & Cases.

The **Demo User** is provided for demonstration versions of Cudgel. Choose DemoMoreMenus and then Demo User's menus expand to almost all the commands of the fully licensed Cudgel program, but with severely restrictedaccess privileges. The Demo User often cannot print, and cannot export or import data. Demo user may delete records only from some views. In addition, the Demo User is limited to no more than 30 records of data per most relations; thereafter the demo misbehaves erratically. The Demo User is also limited in time; beyond the given time limit, the demo misbehaves erratically. Because of some use protection in the demo, it may perform slightly slower than regular Cudgel. The Demo User can print the Feedback form for GreenLight, and can print an order form to purchase Cudgel (the Yes! command under the Demo menu).

DemoFixer, under the Demo menu of Demo user, presents menu choices that customize Cudgel for your firm: form letter scripts, abbreviation, interest rates, case tabs, quotes, matter statuses, treaties, firm organizational units, venues, deadline rules, zones, customized help hints, proof standards, and commands to make powerful changes—new client, new owner, new staff, close case, close client.

Cudgel helps you work your way, with your clients, cases, and matters. You can start productively using Cudgel with only a few clients, matters, and scripts. As you continue to transfer your firm's data into Cudgel you'll gain the fast, flexible, friendly power of a relational database and the efficiency of Cudgel. «

6. EXPLORING THE BONUS— MacGuide® and Elan®

MacGuide has provided commentary and evaluation for Macintosh products and services since 1985. Available from the Elan website are selections of MacGuide publications. MacGuide welcomes your comments, at <macguide@mac.com>.

Elan provides consulting services, and has developed the **MoneyLab®,** an exploration of money and psychology. Elan's MoneyLab helps you gain practical understanding and effective control of your personal money attitudes and restraints-society's last remaining taboo. Included in the bonus is Elan's Twelve Steps to Money Literacy —Avoiding Asset Anxieties.

Also available from the Elan website is "Reducing the People Problems of Computerization," Law Office Economics and Management.«

7. YOUR CUDGEL® DEMO LICENSE

READ THIS, it is your license to use Cudgel®.

Elan Associates (Elan) grants you a non-exclusive license to use GreenLight Software's (Greenlight) Cudgel®DemoX (including Cudgel® with CalendarEye®, Client Portrait®, and Cadence®) (the Software) according to the following terms.

If you do not agree to these terms, you must stop your use of Cudgel and related documentation.

Please advise Elan of your experience with GreenLight software, at <elan@keganlaw.com>.

• Demo Version. Cudgel®DemoX users may explore Cudgel® with CalendarEye®, Client Portrait®, and Cadence® to determine whether they wish to purchase Cudgel and may install the Cudgel®DemoX version on their computers. Cudgel®DemoX users may not reverse engineer or otherwise illegally simulate the organization, structure, or function of GreenLight software. Moreover, Cudgel is patented, as well as protected by copyright and trademark law. This agreement does not grant you any ownership right in or to the Software's intellectual property.

• Fully Licensed Version. A full license to use this GreenLight product may be obtained from Elan. The standard initial license permits five concurrent

users with a single server, using Helix-licensed Helix Server with five Helix-licensed Helix Clients, permits alternative use with Helix Engine or Helix RADE (Rapid Application Development Environment) in Design mode, and permits remote use on a laptop computer by one of the licensed concurrent users.

• Copies & Transfers. You may physically transfer the Software from one computer to another provided that the number of licensed concurrent users is not exceeded, all users are members of your licensed organization, and Elan/GreenLight's proprietary notices remain prominent. You may not physically or electronically distribute copies of the non- demo software to others not covered by your license. Licenses for additional concurrent users are readily available; contact Elan Associates for license arrangements. Elan's license is personal to you and may not be transferred without prior written authorization from Elan.

• **Open Architecture** Cudgel. Cudgel is open architecture software; licensed users may see and modify the Cudgel source code, which is programmed in Helix language. However, you are solely responsible for the software once you make any changes to it. The underlying Helix software is not open source and is licensed by QSA Toolworks, not by Elan.

• Separate, Remote Use. A separate litigation Cudgel collection may be created for remote optimized use at trial. Simply make another working file from your server Cudgel (with data) or from the GreenLight distribution disk (which will lack the previously entered data), calling it for example "CudgelDWebster". If you enter new data at trial and you want to integrate the new data with the firm centralized data, the new remote data will have to be synchronized with the firm centralized data— see your firm Administrator, who should be well versed in Helix and Cudgel. You may create a separate, remote Cudgel version, provided that you only use one remote Cudgel at a time. If you need to use two separate Cudgel collections at the same time, contact GreenLight for an appropriate license.

• Warranty. GreenLight 30-day guarantees its products to perform as it describes; if you encounter an unsolved problem simply send us within thirty (30) days of your purchase of the Software license a written description of the problem with your certified statement that you have destroyed all copies of the Software and your purchase price will be refunded. You might want to try GreenLight help beforehand; a perceived unsolved problem may have a usable solution.

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• Term. This license is effective until terminated. Elan has the right to terminate your license immediately if you fail to comply with any term of this agreement. Upon termination you must stop your use of the Software and destroy all copies of the Software and related documentation in your custody or control.

• Problems. This agreement is made under Illinois law, excluding its conflict of laws provisions. Should there be an unresolved dispute, the parties agree to the exclusive jurisdiction and venue of the federal and state courts in Chicago Illinois USA. Please be practical— if you have a problem with Cudgel, let Elan know as soon as feasible. If you have a problem with Helix, first review the QSA tech database, <http://www.qsatoolworks.com/support/ techdb.html>, thereafter if not solved, let QSA Toolworks know as soon as feasible. You may also find the independent Helix List useful: Archives at <http://groups.google.com/ group/helix- l> and <http://mail.realpeople.com:8100/Lists/ Helix-L/List.html>; subscribe at <<Helix-L- request@realpeople.com>.

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