

DocketEase™

A Client, File, Due Date,
Docket, Invoice and Payment
Management System

USER MANUAL



December 2005

DocketEase™

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INTRODUCTION

The purpose of DocketEase is to make keeping track of clients, files, due dates, docket, invoices and payments quick and easy such that invoices can be produced in minutes, thereby simplifying the time-consuming, tedious task of invoicing.

This document outlines the basic features and functionality of DocketEase.

SUMMARY OF FEATURES

Features

- **Manage Clients and Files:** Client information is entered only once, regardless of the number of files there are for a given client. Files are then associated with an existing client. File numbers can be auto-generated or can be manually entered. Printable/saveable client/file reports are available at the click of a button for a particular client's files, all clients/files, open files only, and closed files only. Transfer (closed) file numbers are auto-generated, but can be disregarded if desired.
- **Manage File Due Dates:** An unlimited number of due dates and/or reminder dates can be entered for each file. Outstanding Due Date reports are available for a daily, weekly (7 day) or monthly (31-day) period.
- **Manage Dockets:** Dockets for time, flat fees, and disbursements are entered against their respective file as they occur. Printable/saveable docket reports are available at the click of a button (i.e. docket for a particular client, on a particular file, for a particular lawyer or on a particular date.) Old docket can be 'purged' (removed) from DocketEase as desired.
- **Manage Invoices Rendered and Monies Received:** Invoices rendered and monies received are entered against a particular file. Printable/saveable ledger reports are available at the click of a button for all clients/files, a particular client or a particular file.
- **Produce Invoices:** Invoices are produced (and completely calculated) by the click of a single button. Time and flat fee docket are itemized in the invoice; time is totalled by lawyer fee schedule; flat fee items are totalled; disbursements are grouped by disbursement type and totalled; GST and PST are added as applicable; and trust balance is deducted from invoice total amount. Invoices can then be printed to send to the client and keep in the file and/or exported to (saved in) Word format for further editing or saving to disk.
- **Generate Form Letters:** Form letters are generated by the click of a button. Additional form letters can be added as required.
- **Conflict Search:** At the click of a button DocketEase will produce a list of all files containing a particular string of characters (i.e. a name) for conflict purposes.
- **Searches:** DocketEase has a number of built-in searches making it quick and easy to find a particular client, a particular file, or even a particular telephone number (for telephone bill reconciliation).

Accessibility

DocketEase was developed for the small office; however, it has been developed such that it can be accessed by a number of people (professionals and support staff) at the same time without difficulty in a networked environment. It is highly recommended, however, that access be limited to 10 users in order not to hamper speed or cause sharing conflicts.

Flexibility

Personal information such as firm name, address; GST and PST percentage; lawyers names; fee schedule, etc. can be easily changed at any time.

Safeguarding of Data

It is **extremely important** to safeguard the data entered into DocketEase in case the computer on which the data resides 'crashes' as a loss of such data would most certainly constitute a loss of income. However, only the data portion ('back-end') of DocketEase need be safeguarded. There are a number of very simple ways this can be accomplished:

- Manually copy the DocketEase data file (DocketEase_be.mdb) to another networked computer or CD at the end of each day;
- Set up an automatic Windows Backup copy the DocketEase data file (DocketEase_be.mdb) to another networked computer or CD at the end of each day;
- Export all data to Excel spreadsheets: at the click of a button all data is exported to Excel spreadsheets which can then be printed or copied to diskettes or CD or stored on another computer.
- Run and print client, file and docket reports on a regular basis.

Security

- User-specific access security: In order to access DocketEase, a userID and password are required. There are three user access levels built into DocketEase, they are:
 - Administrator: Can access/edit everything (users/passwords, picklists, and data);
 - Editor: Can create new entries (clients, files, dockets, etc.), and can view and edit existing entries; and
 - Viewer: can view all entries, but cannot edit anything.Users can be easily added, removed, or changed by the DocketEase Administrator. Users can change their own password as desired.
- Protection of Data from Direct Access: The data portion ('back-end' tables) of DocketEase are split apart from user portion ('front-end' forms and reports) and password protected such that the data tables can only be accessed via the built-in forms/reports and cannot, therefore, be inadvertently tampered with. This will help ensure the integrity and overall performance of the application.
- Protection of Application Code from Direct Access: The user portion ('front-end forms/reports) has been 'locked' and password protected such that the forms and reports cannot be inadvertently tampered with. This will help ensure the integrity and overall performance of the application.

TECHNICAL REQUIREMENTS

DocketEase requires Windows 2000 or higher (i.e. 2000, ME or XP). Alternatively, DocketEase can be made to run on Windows 95/98 with the addition of MS Access 2000 or higher.

TECHNICAL SUPPORT

Technical support is available by writing to Daigle Computer Intuitions Inc. at support@computerintuitions.ca or by calling 613-832-9325.

INSTALLATION

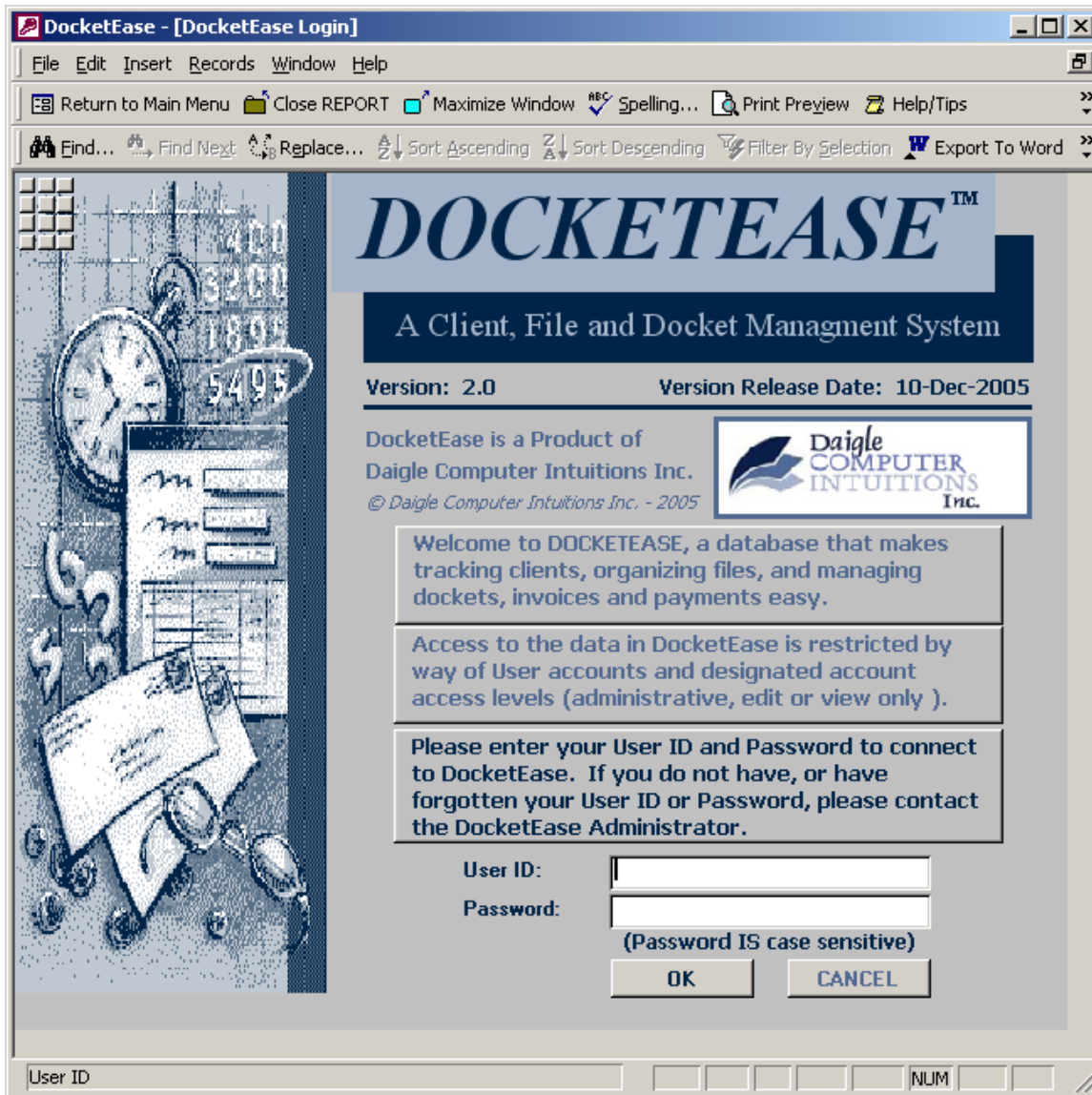
- A. In a single-computer environment: Run the DocketEase.exe file on the CD provided. DocketEase will be installed in a new folder created in 'My Documents' called DocketEase and a DocketEase Icon (shortcut) will be added to your Windows Desktop for convenient access. Both the 'back-end' (data tables) and 'front-end' (forms/reports) will reside in the DocketEase folder in My Documents. **DO NOT uninstall or reinstall DocketEase from the CD provided once DocketEase is in use as doing so will remove/replace any existing data.** If, after using DocketEase in a single-computer environment it is subsequently desired to share the application (in a networked environment), the current 'back-end' (data tables) must be copied to a shared (networked) computer, then the current single-computer environment version can be uninstalled and the network environment version installed as outlined below. It is highly recommended that you contact DocketEase Technical Support for assistance before attempting to change from a single-computer environment to a network environment.
- B. In a multiple-computer (networked) environment: Installation in a networked (shared) environment is a two-part process:
- On the Server/Shared Computer: Create and share a folder that will contain the shared 'back-end' data file, and then Copy the DocketEase 'back-end' file from the CD provided to the newly created folder.
 - On EACH User Computer: Map Y: drive to the shared network folder, then run the DocketEase.exe file on the CD provided. The DocketEase 'front-end' file will be installed on the user's computer (in C:\Program Files\DocketEase) and a DocketEase Icon (shortcut) will be added to the Windows Desktop for convenient access.
- For assistance in setting up the network shared folder, mapping the Y: drive on the user's computers, and installing DocketEase, please contact DocketEase Technical Support.


OPENING AND CLOSING DOCKETEASE

To open DocketEase, double-click the **DocketEase Icon** (shortcut) on your Windows Desktop.



DocketEase will then prompt you for your User ID and Password, enter your User ID and Password in the appropriate boxes, and then click the OK button. Note that the password IS case sensitive. If you do not have a User ID or Password, contact your DocketEase Administrator. If you do not have a DocketEase Administrator and need assistance accessing DocketEase for the first time in order to set up Users and Passwords, contact DocketEase Technical Support.

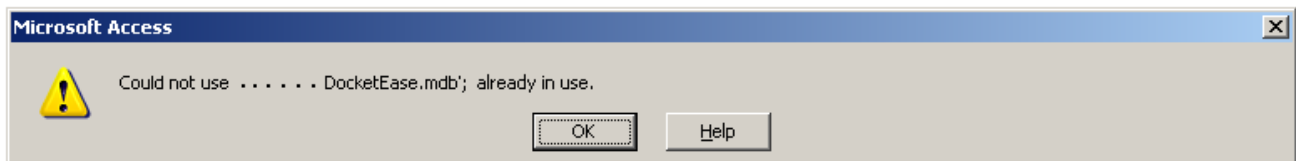
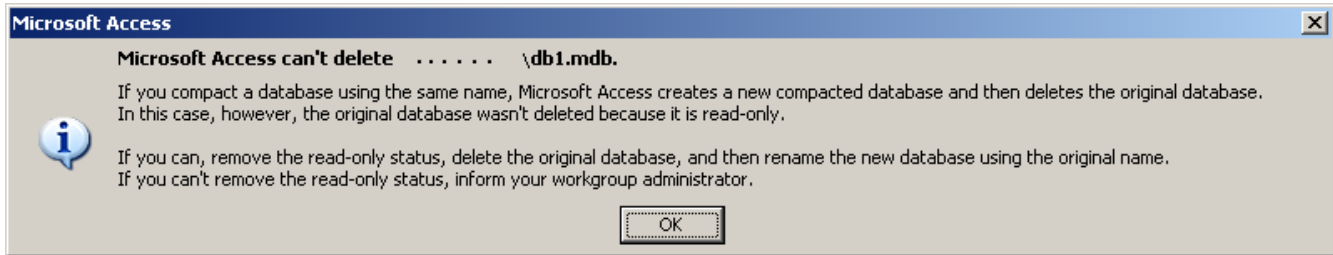


To close DocketEase, click the **Exit DocketEase** button on the Toolbar or click the **Close** button in the upper right corner. 

In order for a database to continue to perform well, it should be compacted and repaired on a regular basis. Therefore, DocketEase will automatically compact each time it is closed which may cause an apparent delay in closing. The word 'Compacting' will appear on the left-hand side of the Status Bar (at the bottom of the DocketEase window) while the database is being compacted. If more than one person has the database open at the same time, the database will only compact when the last person closes it.

If on closing DocketEase a message appears advising that 'Microsoft Access cannot delete ... db*.mdb' (usually db1.mdb); OR that Access 'Could not use DocketEase', it simply means that the compacting of DocketEase on close was not successful. This does NOT create any problem with respect to the running of DocketEase as it is not necessary to compact every time DocketEase is used and it will be compacted the next time it is used.

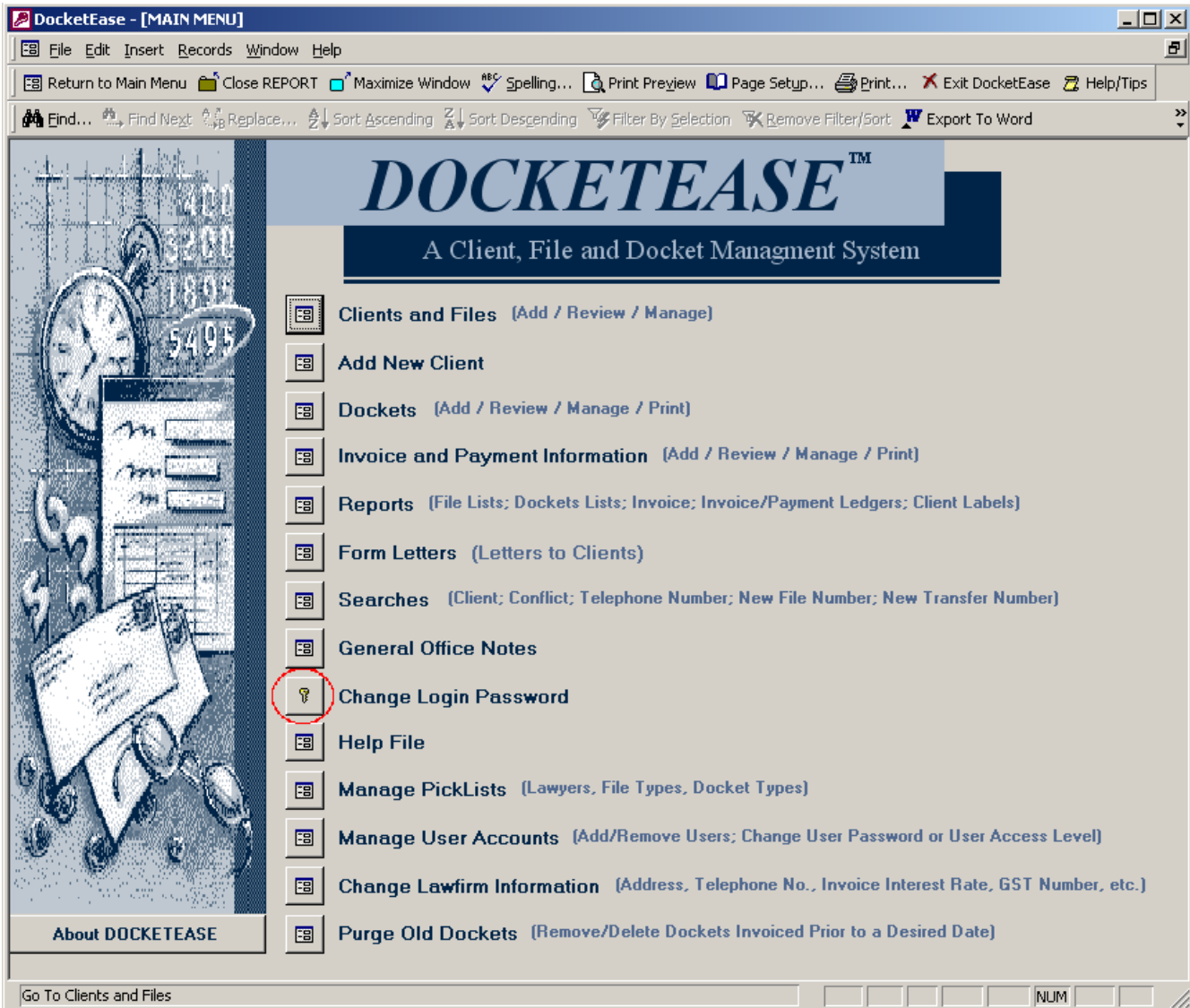
In either case, simply click the **OK** button to close the message and DocketEase will close.



However, when this happens a db*.mdb (usually db1.mdb) file will be 'left behind' in the same location as the actual DocketEase file. Any such file(s) should be deleted as they are of no use whatsoever.

CHANGING USER LOGIN PASSWORD

A user may change their password at any time when logged into DocketEase. To change your password, click the **Change Login Password** button on the **DocketEase Main Menu**.



This will open the **CHANGE PASSWORD** form wherein the User ID of the currently logged on user will be displayed in the User ID box.

In order to change your password, enter the desired new password in both the New Password and Confirm New Password box and then click the OK button. Click the CANCEL button to cancel the change of password request (and leave the password as it is).



If either the New Password or Confirm New Password were left blank a message will appear advising accordingly. Clicking the OK button will return you to the **CHANGE PASSWORD** form.



If the New Password and Confirm New Password do not match a message will appear advising. Clicking the OK button will return you to the **CHANGE PASSWORD** form.

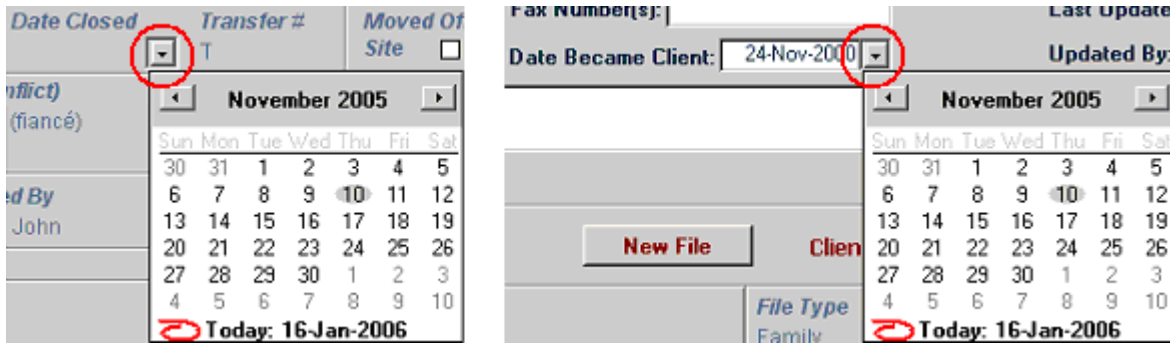


GENERAL TIPS REGARDING THE ENTERING OF INFORMATION

Entering Dates

Dates can be entered into a 'date' field by:

- clicking the date-time picker to the right of the date field, then selecting (by clicking) the desired date in the pop-up calendar, which will enter the selected date into the date field;



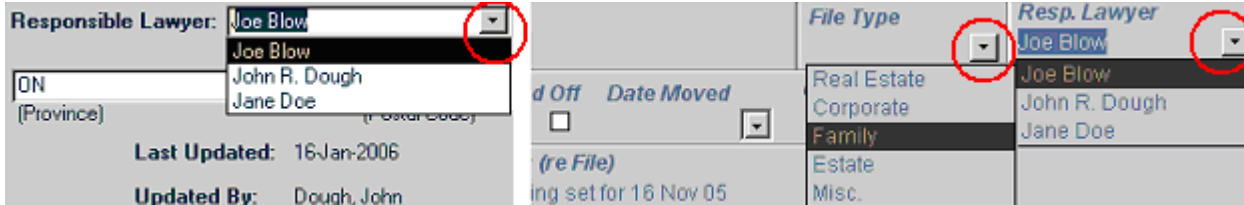
OR

- clicking in (or tabbing into) the date field to position the flashing insertion point therein, then typing the desired date, keeping in mind that dates must be entered using the dd-mmm-yyyy format (i.e. 1 jan 2004 or 01-jan-04)

Note: Some dates are auto-filled (with 'today's date') when the item is created (i.e. new client, new file or new docket), but these auto-filled dates can be manually changed as desired.

Using Pick-Lists

A number of fields are controlled by pick-lists in order to ensure that the value entered in the field is correct. To change a 'pick-list' field (i.e. Responsible Lawyer, File Type), click the down arrow ▼ to the right of the field and then click on the appropriate information in the list. 'Pick-list' fields help ensure the integrity of the information entered for the purpose of searches and reports. If a desired item is not in the picklist it can be easily added. (See [MANAGING PICK-LISTS](#) more information in this regard.)



Moving between fields

1. To move forward between fields using the keyboard, tap the Tab key.
2. To move backward between fields using the keyboard, hold down the Shift key and tap the Tab key.

Spell-checking data in a field

To spell check data in a field, highlight the text (or the entire field) and either tap the F7 key on the keyboard or click the Spelling button on the Toolbar.



Undoing/reversing changes

As long as you remain in a given form and do not make changes to a subsequent record in that form, 'Undo' (Ctrl+Z, Edit/Undo or the Undo button on the Toolbar ↶) can be used to undo **all** changes made to the **last worked** on record. Therefore, it is important to ensure that you have made the changes in the correct field/record before exiting the form or making changes to a subsequent record. Once you make changes to a subsequent record or exit the form 'Undo' **will not** change the information back.

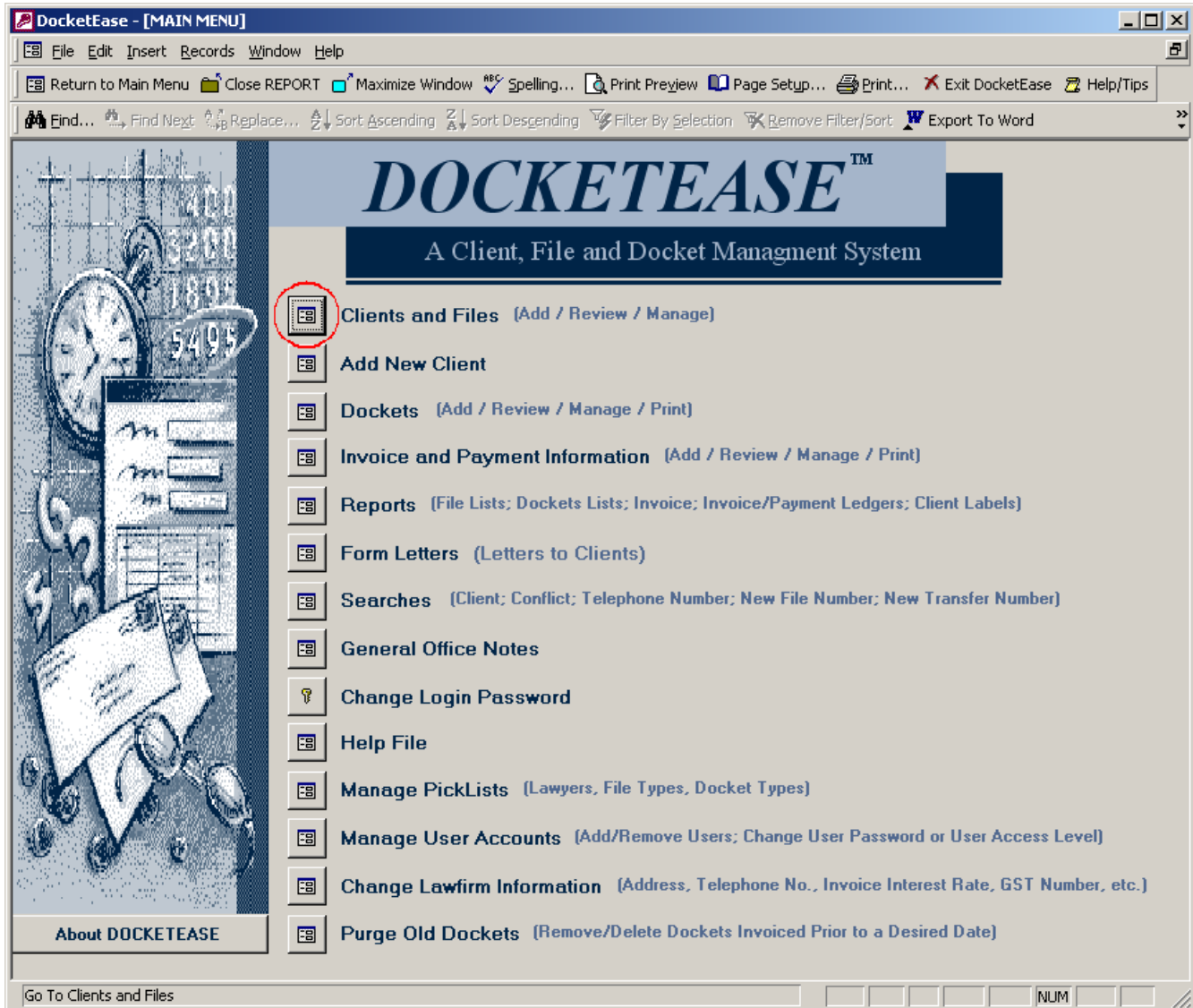
Screen goes blank (grey) after clicking the Close Report button on the Toolbar.

Although this Close Report button can be used to close forms, it is recommended that the Return to Main Menu button be used to close forms so that the **DocketEase Main Menu** screen (form) opens in place of the closing form. Using the this Close Report button will NOT cause the **DocketEase Main Menu** to open when the other form is closed and the screen will, therefore, be blank. In this case, click the Return to Main Menu button on the Toolbar, which will open the **DocketEase Main Menu**. The **Close Report** button on the Toolbar is there to close reports, which do not have a Return to Main Menu button on them.

MANAGING CLIENTS AND FILES

Viewing, adding or editing EXISTING Client and File information

To view, add, or edit Client and/or File information for an EXISTING client or file, click the Clients and Files button on the **DocketEase Main Menu** screen (form).



This will open the **ADD/EDIT (or VIEW) CLIENT AND FILE INFORMATION** form, which will NOT immediately display any client or file information.

To select an existing client, click the down arrow in the Existing Clients box to reveal a 'pick-list' of existing clients (in alphabetical order).

DocketEase - [Add / Edit Client and File Information]

File Edit Insert Records Window Help

Return to Main Menu Close REPORT Maximize Window Spelling... Print Preview Page Setup... Print... Exit DocketEase Help/Tips

Find... Find Next Replace... Sort Ascending Sort Descending Filter By Selection Remove Filter/Sort Filter Excluding Selection Export To Word

Return To Main Menu Prepare Dockets Report (this Client) Prepare Ledger (this Client) Add/Edit Invoices/Payments (this Client)

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:

Select an EXISTING client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.

Click down arrow to see list of existing clients

Client Name: Client No.: Contact: Responsible Lawyer:

(Surname, First Name) (AutoNumber) (i.e. Mr. Smith)

Salutation: Address:

(Street Address) (City/Town) (Province) Canada (Country) (Postal Code)

Tel. Number(s): Fax Number(s): eMail:

Referred By: Date Became Client:

NOTES (re Client):

Last Updated: Updated By:

CLIENT FILE(S):

Add/Edit Dockets (this File) Prepare Dockets Report (this File) Prepare Ledger (this File) Prepare Invoice (this File) Prepare Form Letter (this File)

Select an EXISTING file from the 'Client Files' list - OR - Click the 'New File' button then enter file information below.

Click the down arrow to see list of c

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened
Legal Aid <input type="checkbox"/>	File Closed <input type="checkbox"/> Date Closed <input type="text"/> Transfer # <input type="text"/>	Moved Off Site <input type="checkbox"/>	Date Moved <input type="text"/>	Off Site Facility <input type="text"/>	
Other People On File (re conflict)			Notes (re File)		
Billing Address Same Yes <input type="text"/> - OR - As Client Address?		Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)			
Spare1 (text - 50 char)	Spare2 (text - 150 char)	Spare3 (text - 250 char)	Last Updated	Updated By	

Return to Main Menu NUM

Then select a client from the pick-list by either clicking (once) on the client's name in the pick-list or by typing the first few letters of the client's name in the Existing Clients box (which will cause the pick-list to jump down the list to the first matching client name.)

DocketEase - [Add / Edit Client and File Information]

File Edit Insert Records Window Help

Return to Main Menu Close REPORT Maximize Window Spelling... Print Preview Page Setup... Print... Exit DocketEase Help/Tips

Find... Find Next Replace... Sort Ascending Sort Descending Filter By Selection Remove Filter/Sort Filter Excluding Selection Export To Word

Return To Main Menu Prepare Dockets Report (this Client) Prepare Ledger (this Client) Add/Edit Invoices/Payments (this Client)

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:

Select an EXISTING client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.

New Client Existing Clients:

Client Name: Client No.: Contact: Resp:
(Surname, First Name) (i.e. Mr. Smith)

Salutation: Address:
(Street Address) (City/Town) (Province)

Tel. Number(s): Fax Number(s): eMail:

Referred By: Date Became Client: **Prepare eMail to this Client re file BELOW**

NOTES (re Client):

Last Updated: Updated By:

CLIENT FILE(S):

Add/Edit Dockets (this File) Prepare Dockets Report (this File) Prepare Ledger (this File) Prepare Invoice (this File) Prepare Form Letter (this File)

Select an EXISTING file from the 'Client Files' list - OR - Click the 'New File' button then enter file information below.

New File View/Hide Due Dates Client Files:

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened		
Legal Aid	File Closed	Date Closed	Transfer #	Moved Off Site	Date Moved	Off Site Facility	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	T	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Other People On File (re conflict)			Notes (re File)				
Billing Address Same Yes <input type="text"/> - OR - Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)							
Spare1 (text - 50 char)		Spare2 (text - 150 char)		Spare3 (text - 250 char)		Last Updated	Updated By
<input type="text"/>		<input type="text"/>		<input type="text"/>			

Drop-Down List of Existing Clients

The **ADD/EDIT CLIENT AND FILE INFORMATION** form will then be populated with the information of the selected client in the CLIENT INFORMATION section (in the upper half of the form) and the selected client's first file in the CLIENT FILE(S) section (in the lower half of the form).

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:

Select an **EXISTING** client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.

New Client Existing Clients [dropdown]

Client Name: Feeney, Jeremy Client No.: 6 Contact: [dropdown] Responsible Lawyer: Joe Blow [dropdown]
(Surname, First Name) (i.e. Mr. Smith)

Salutation: Mr. Feeney Address: 789 Tenth Street Ottawa ON K1K 1K1
(Street Address) (City/Town) (Province) (Country) (Postal Code)

Tel. Number(s): 567-8910 Fax Number(s): [dropdown] eMail: jfeeney@yahoo.ca

Referred By: [dropdown] Date Became Client: 07-Nov-2005 [dropdown] **Prepare eMail to this Client re file BELOW**

NOTES (re Client): [text area]

Last Updated: 16-Mar-2006 Updated By: Dough, John

CLIENT FILE(S):

Add/Edit Dockets (this File) **Prepare Dockets Report (this File)** **Prepare Ledger (this File)** **Prepare Invoice (this File)** **Prepare Form Letter (this File)**

Select an **EXISTING** file from the 'Client Files' list - OR - Click the 'New File' button then enter file information below.

New File **View/Hide Due Dates** Client Files: [dropdown]

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened	
1000	Divorce and Child Custody		Family	Joe Blow	12-Apr-2005	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	06-Sep-2005	Transfer #	Moved Off Site	Date Moved	Off Site Facility
		T1002		<input checked="" type="checkbox"/>	07-Nov-2005	Boyd's
Other People On File (re conflict) Cheryl Sheen (x-wife); Joe Smith (x-wife's new partner)			Notes (re File) Feeney, Jeremy			
Billing Address Same As Client Address? Yes [dropdown] - OR - Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)						
Spare1 (text - 50 char)		Spare2 (text - 150 char)		Spare3 (text - 250 char)		
				Last Updated	Updated By	
				12-Mar-2006	Dough, John	

Drop-Down List of Existing Clients [dropdown] NUM [dropdown]

To select a different file for the current client, click the down arrow in the Client Files box to reveal a 'pick-list' of the current client's files (in chronological order), then select a file from the pick-list by clicking (once) on the file.

DocketEase - [Add / Edit Client and File Information]

File Edit Insert Records Window Help

Return to Main Menu Close REPORT Maximize Window Spelling... Print Preview Page Setup... Print... Exit DocketEase Help/Tips

Find... Find Next Replace... Sort Ascending Sort Descending Filter By Selection Remove Filter/Sort Filter Excluding Selection Export To Word

Return To Main Menu Prepare Dockets Report (this Client) Prepare Ledger (this Client) Add/Edit Invoices/Payments (this Client)

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:

Select an EXISTING client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.

New Client Existing Clients Click down arrow to see list of existing clients

Client Name: Feeney, Jeremy Client No.: 6 Contact: Responsible Lawyer: Joe Blow

Salutation: Mr. Feeney Address: 789 Tenth Street Ottawa ON K1K 1K1

Tel. Number(s): 567-8910 Fax Number(s): eMail: jfeeney@yahoo.ca

Referred By: Date Became Client: 07-Nov-2005 **Prepare eMail to this Client re file BELOW**

NOTES (re Client):

Last Updated: 16-Mar-2006 Updated By: Dough, John

CLIENT FILE(S):

Add/Edit Dockets (this File) Prepare Dockets Report (this File) Prepare Ledger (this File) Prepare Invoice (this File) Prepare Form Letter (this File)

Select an EXISTING file from the 'Client Files' list - OR - Click the 'New File' button then enter file information below.

New File View/Hide Due Dates Client Files: 1008

File No.	File Description	Client Ref.	File Type	Resp
1000	Divorce and Child Custody		Family	Joe Bl
1001	Register Business Name (Franklin & As			
1002	Purchase of property at Lot 1, Conc.			
1003	Will for Joseph Franklin			
1004	Will for Robert (Bob) Franklin (brother			
1005	Purchase of Condo Apt. at 23 Westfo			
1006	Sale of Condo Apt. At 23 Westford D			
1007	Purchase of property at 658 Bayview			
1008	Prenuptial Agreement			
1009	Trademark Search (Franklin & Assoc.)			

Legal Aid File Closed Date Closed 06-Sep-2005 Transfer # T1002 Moved Off Site Date Moved 07-Nov-2005 Off Site Facility Boyds

Other People On File (re conflict): Cheryl Sheen (x-wife); Joe Smith (x-wife's new partner)

Notes (re File):

Billing Address Same Yes - OR - Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)

Spare1 (text - 50 char) Spare2 (text - 150 char) Spare3 (text - 250 char) Last Updated 12-Mar-2006 Updated By Dough, John

Drop-Down List of Files for Current Client

To select a different client, click the down arrow in the Existing Clients box and select the desired client.

The client and file information can be edited by any user having Administrator or Editor access, but cannot be edited by users having only Viewer access.

To return to the **DOCKETEASE Main Menu**, click the **RETURN TO MAIN MENU** button in the upper right corner of this form.

Notes:

1. These screens are called “forms” because, like a paper form, there are generally places/boxes in which to enter information. The boxes in which information is entered are called ‘Fields’ (but are commonly referred to as ‘boxes’ or ‘cells’.)
2. Most DOCKETEASE forms do not support the use of the mouse wheel. In this case, use of the mouse wheel (to scroll down) will simply scroll to a new (blank) form similar to when the form was first opened. To return to the previous (not blank) form, mouse wheel back up.

Adding a new File

New files can only be added by Administrators and Editors. To add a new file for a particular (existing) client, first locate the desired client as outlined in the [View, add or edit EXISTING Client and/or File information](#) section above. The first existing file for the selected client will automatically appear in the CLIENT FILE(S) section (in the lower half of the form). Then click the New File button (in the CLIENT FILE(S) section).

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:

Select an EXISTING client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.

New Client Existing Clients Click down arrow to see list of existing clients

Client Name: Feeney, Jeremy (Surname, First Name) Client No.: 6 Contact: (i.e. Mr. Smith) Responsible Lawyer: Joe Blow

Salutation: Mr. Feeney Address: 789 Tenth Street Ottawa ON K1K 1K1 (Street Address) (City/Town) (Province) (Country) (Postal Code)

Tel. Number(s): 567-8910 Fax Number(s): eMail: feeney@yahoo.ca

Referred By: Date Became Client: 07-Nov-2005 **Prepare eMail to this Client re file BELOW**

NOTES (re Client):

Last Updated: 16-Mar-2006 Updated By: Dough, John

CLIENT FILE(S):

New File View/Hide Due Dates Client Files:

Select an EXISTING file from the 'Client Files' list - OR - Click the 'New File' button then enter file information below.

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened
1007	Purchase of property at 658 Bayview Drive, Constance Bay, ON		Real Estate	Jane Doe	23-Nov-2005

Legal Aid File Closed Date Closed Transfer # Moved Off Site Date Moved Off Site Facility

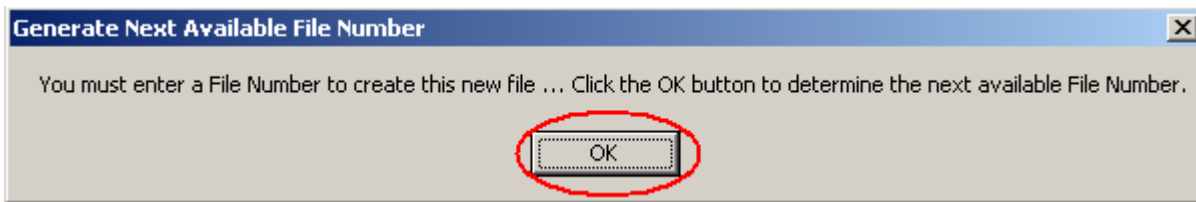
Other People On File (re conflict) Notes (re File) Feeney, Jeremy

Billing Address Same As Client Address? Yes - OR - Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)

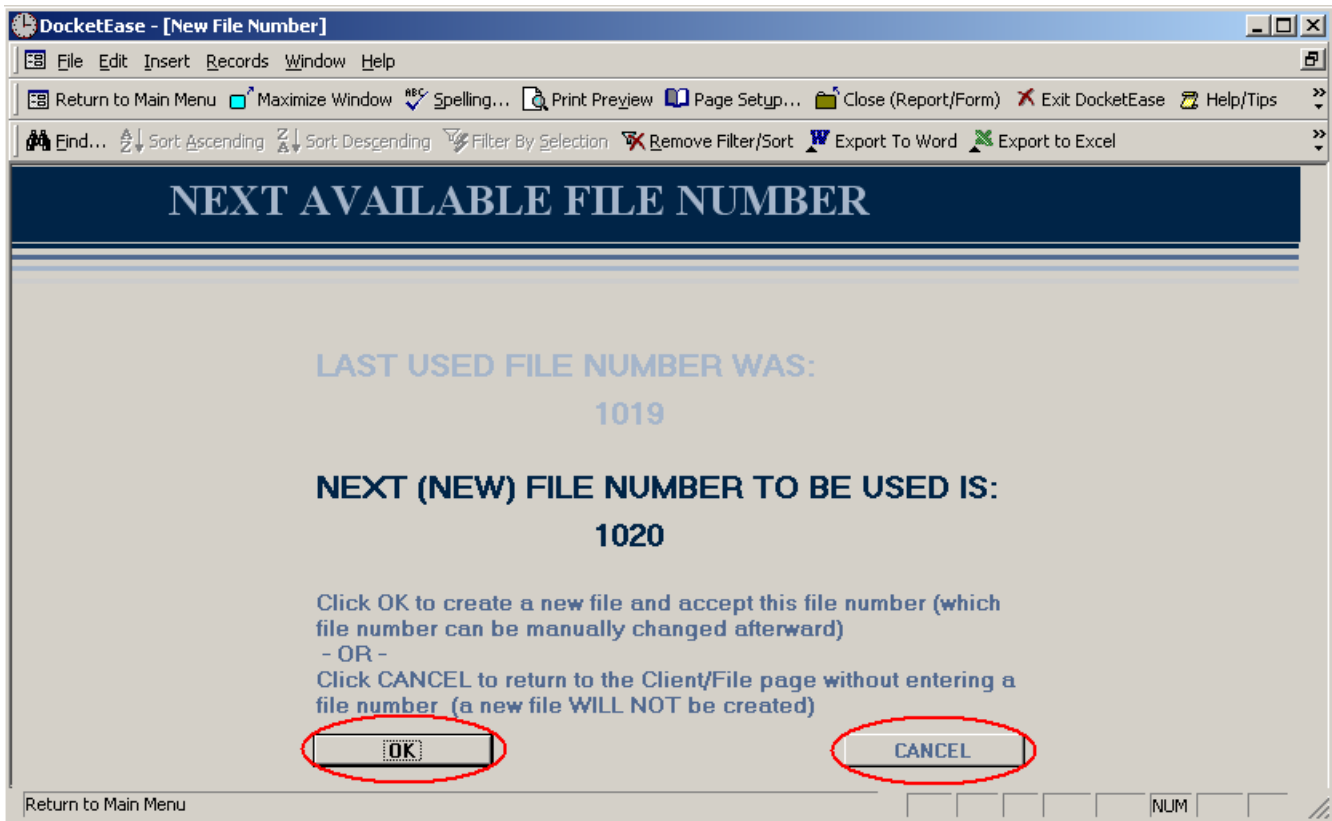
Spare1 (text - 50 char) Spare2 (text - 150 char) Spare3 (text - 250 char) Last Updated: 07-Dec-2005 Updated By: Dough, John

Drop-Down List of Files for Current Client NUM

A prompt will appear advising that the next available file number will be auto-generated. Click the OK button to proceed.



DocketEase will then display the last used file number and the next available file number (i.e. the file number to be used for the new file). Clicking the OK button will create the new file and enter the new file number in the file number field of the *ADD/EDIT CLIENT AND FILE INFORMATION* form. Clicking the CANCEL button will cancel the creation of the new file and return to the *ADD/EDIT CLIENT AND FILE INFORMATION* form.



Note: The file number can be manually changed after it is auto-generated by DocketEase. Therefore, if it is desirable to create a new file with a file number other than that suggested by DocketEase, still click the OK button, then change the file number manually, keeping in mind that file numbers may ONLY contain numbers (i.e. they may NOT be alpha-numeric).

Once the new file number has been entered into CLIENT FILES(S) section of the *ADD/EDIT CLIENT AND FILE INFORMATION* form, the file has been created and **cannot** thereafter be removed. If it is thereafter decided that the new file is not required, leave the rest of the file information blank to be used the next time a file for the current client is required. Otherwise, enter the remaining file information with respect to the new file.

DocketEase - [Add / Edit Client and File Information]

File Edit Insert Records Window Help

Return to Main Menu Close REPORT Maximize Window Spelling... Print Preview Page Setup... Print... Exit DocketEase Help/Tips

Find... Find Next Replace... Sort Ascending Sort Descending Filter By Selection Remove Filter/Sort Filter Excluding Selection Export To Word

Return To Main Menu Prepare Dockets Report (this Client) Prepare Ledger (this Client) Add/Edit Invoices/Payments (this Client)

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:

Select an EXISTING client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.

Existing Clients Click down arrow to see list of existing clients

Client Name: Client No.: Contact: Responsible Lawyer:

(Surname, First Name) (i.e. Mr. Smith)

Salutation: Address:
(Street Address) (City/Town) (Province) (Country) (Postal Code)

Tel. Number(s): Fax Number(s): eMail:

Referred By: Date Became Client:

NOTES (re Client):

Last Updated: 16-Mar-2006 Updated By: Dough, John

CLIENT FILE(S):

Add/Edit Dockets (this File) Prepare Dockets Report (this File) Prepare Ledger (this File) Prepare Invoice (this File) Prepare Form Letter (this File)

Select an EXISTING file from the 'Client Files' list - OR - Click the 'New File' button then enter file information below.

View/Hide Due Dates Client Files: Click the down arrow to see list of c

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened
1018					16-Mar-2006

Legal Aid	File Closed	Date Closed	Transfer #	Moved Off Site	Date Moved	Off Site Facility
<input type="checkbox"/>	<input type="checkbox"/>		T	<input type="checkbox"/>		

Other People On File (re conflict) Notes (re File)

Billing Address Same - OR - Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)

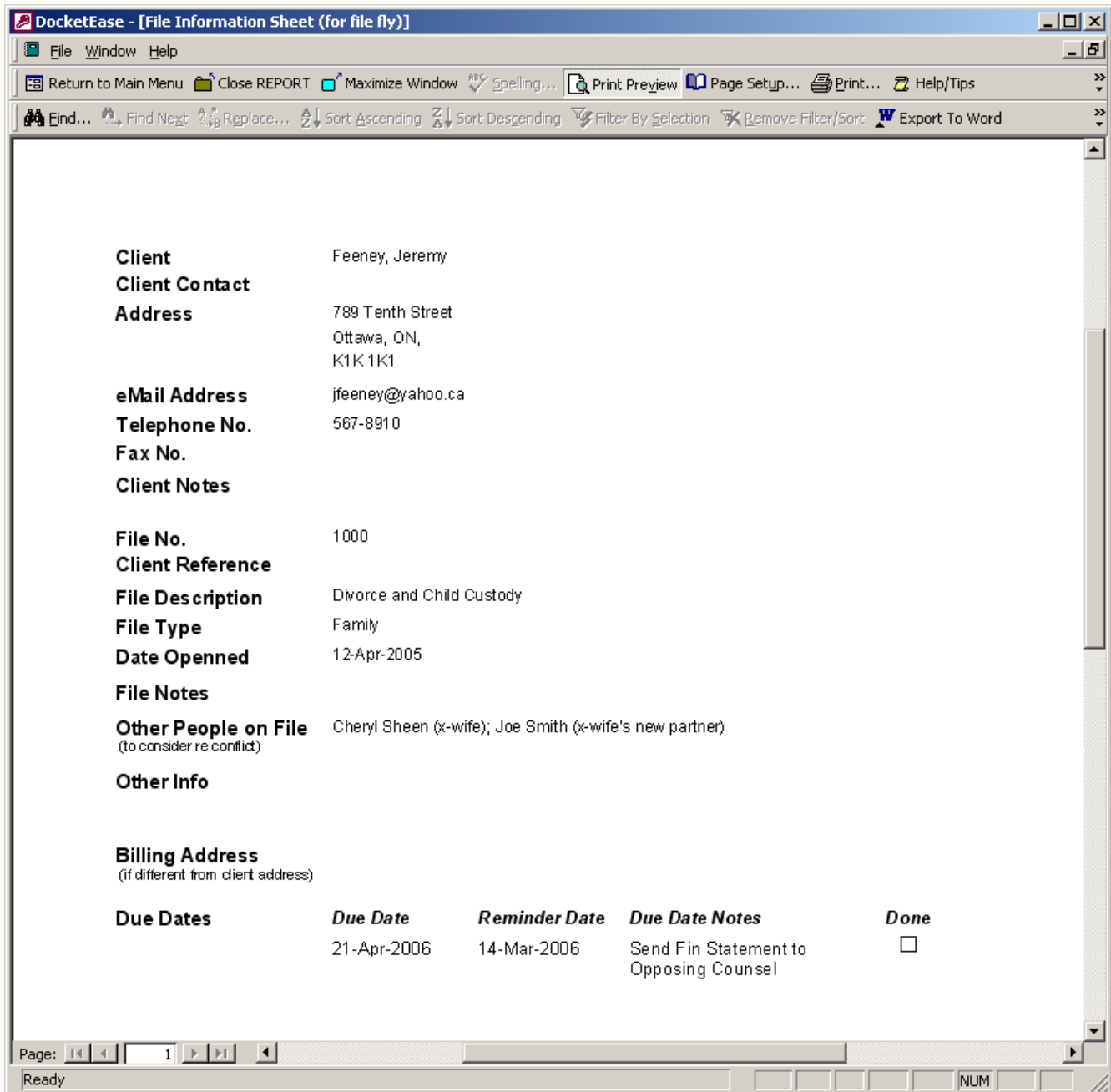
Spare1 (text - 50 char) Spare2 (text - 150 char) Spare3 (text - 250 char) Last Updated Updated By

Add a New Client

After the file information has been entered, a file information sheet can be produced for the file fly from the **REPORTS Menu**.



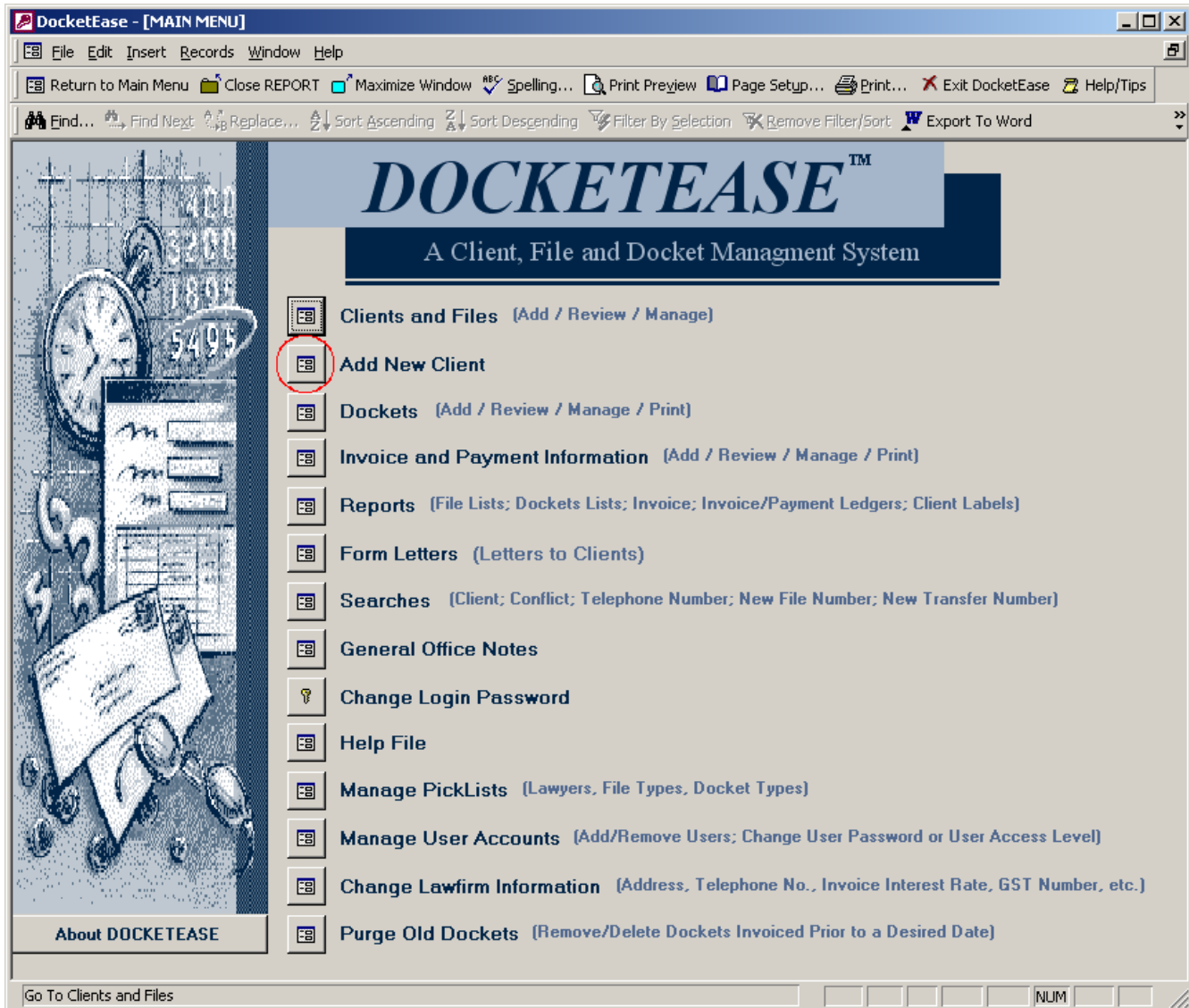
This information sheet can be printed by clicking the **Print** button on the Toolbar.



Adding a new Client

New clients can only be added by Administrators and Editors. A new client can be added directly from **DocketEase Main Menu** or from the **ADD/EDIT CLIENT AND FILE INFORMATION** form.

From the **DocketEase Main Menu**, click the Add New Client button



OR

From the **ADD/EDIT CLIENT AND FILE INFORMATION** form, click the New Client button

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:
 Select an EXISTING client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.

New Client Existing Clients [Click down arrow to see list of existing clients]

Client Name: [Text Box] Client No.: [Text Box] Contact: [Text Box] Responsible Lawyer: [Text Box]

Salutation: [Text Box] Address: [Text Box] [Text Box] Canada [Text Box] [Text Box]

Tel. Number(s): [Text Box] Fax Number(s): [Text Box] eMail: [Text Box]

Referred By: [Text Box] Date Became Client: [Text Box] **Prepare eMail to this Client re file BELOW**

NOTES (re Client): [Text Area]

CLIENT FILE(S): Last Updated: [Text Box] Updated By: [Text Box]

Add/Edit Dockets (this File) Prepare Dockets Report (this File) Prepare Ledger (this File) Prepare Invoice (this File) Prepare Form Letter (this File)

Select an EXISTING file from the 'Client Files' list - OR - Click the 'New File' button then enter file information below.

New File View/Hide Due Dates Client Files: [Click the down arrow to see list of c]

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened
Legal Aid	File Closed Date Closed Transfer #	Moved Off Site	Date Moved	Off Site Facility	
<input type="checkbox"/>	<input type="checkbox"/> [Text Box] T	<input type="checkbox"/>	[Text Box]	<input type="checkbox"/>	
Other People On File (re conflict)			Notes (re File)		
Billing Address Same Yes [Text Box] - OR - As Client Address?			Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)		
Spare1 (text - 50 char)		Spare2 (text - 150 char)		Spare3 (text - 250 char)	
				Last Updated Updated By	

Return to Main Menu [NUM]

In either case, a blank **ADD A NEW CLIENT** form will open on which you can enter the new client information and, thereafter enter new file(s) for the new client. The first new file information can be entered into the blank CLIENT FILE(S) space already visible. To add additional file(s), click the New Files button (to produce a new blank CLIENT FILE(S) space) and then enter the new file information.

Notes: The client's name must be entered first as all other items (files, dockets, payments, invoices, etc.) are connected by the client name.

This **ADD A NEW CLIENT** form does not support the use of the mouse wheel. Use of the mouse wheel (to scroll down) will simply scroll to a new (blank) form similar to when the form was first opened. To return to the previous (not blank) form, mouse wheel back up.

Deleting Clients or Files

In order to prevent the accidental deletion of clients or files, clients and files **cannot** be easily deleted once they have been added to DocketEase. If it does become necessary to remove Clients or Files, you should contact DocketEase Technical Support for assistance in this regard.

VIEWING, ADDING, EDITING, AND MANAGING DUE AND REMINDER DATES

An unlimited number of due dates and/or reminder dates can be entered for each file. Due dates and reminder dates can only be edited or added by Administrators and Editors.

To view existing due dates on a given file:

- A. Locate the desired file from the **ADD/EDIT (or VIEW) CLIENT AND FILE INFORMATION** form (see [View, add or edit EXISTING Client and/or File information](#) for more information in this regard); OR
- B. Search for the desired file by its file number using the File Search feature (see [File Search](#) for more information in this regard).

In either case, once the desired file information is on the screen, click the **View/Hide Due Dates** button to show existing due dates and reminder dates for the selected file. To remove (hide) the file due dates, in order to see the other file information click again the **View/Hide Due Dates** button.

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:

Select an EXISTING client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.

Client Name: Feeney, Jeremy (Surname, First Name) Client No.: 6 Contact: (i.e. Mr. Smith) Responsible Lawyer: Joe Blow

Salutation: Mr. Feeney Address: 789 Tenth Street (Street Address) Ottawa (City/Town) ON (Province) (Country) K1K 1K1 (Postal Code)

Tel. Number(s): 567-8910 Fax Number(s): eMail: feeney@yahoo.ca

Referred By: Date Became Client: 07-Nov-2005 Prepare eMail to this Client re file BELOW

NOTES (re Client):

Last Updated: 16-Mar-2006 Updated By: Dough, John

CLIENT FILE(S):

Add/Edit Dockets (this File) Prepare Dockets Report (this File) Prepare Ledger (this File) Prepare Invoice (this File) Prepare Form Letter (this File)

Select an EXISTING file from the 'Client Files' list - OR - Click the 'New File' button then enter file information below.

New File View/Hide Due Dates Client Files: Click the down arrow to see list of c

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened
1000	Divorce and Child Custody		Family	Joe Blow	12-Apr-2005


File No.	Due Date	Reminder Date	Due Date Details/Notes	Resp. Lawyer	Completed	Date Completed
1000	21-Apr-2006	14-Mar-2006	Send Fin Statement to Opposing Counsel	Joe Blow	<input type="checkbox"/>	

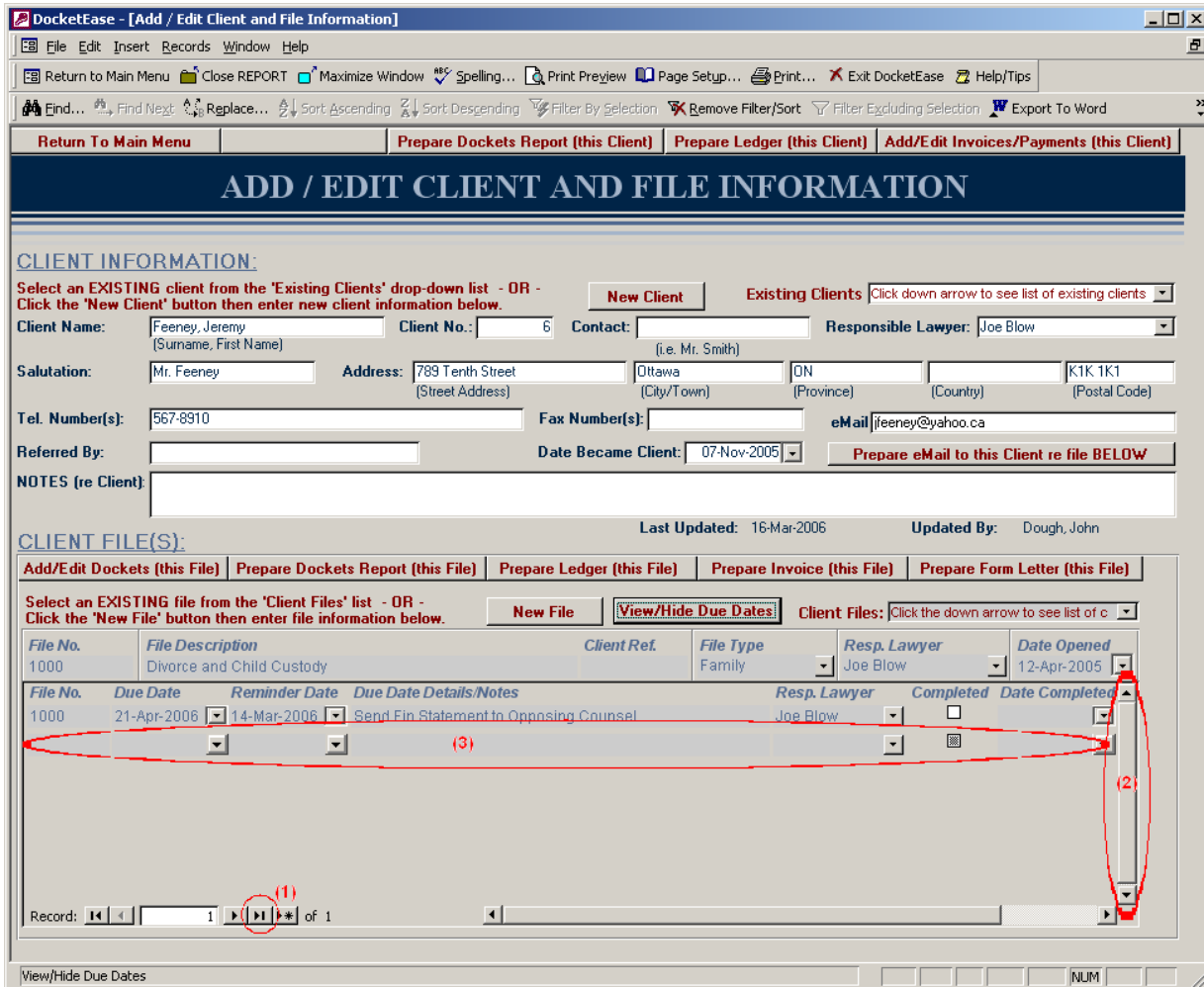
Record: 1 of 1

View/Hide Due Dates NUM

All due date information except 'Last Updated' and 'Updated By' can be modified (by an Administrator or Editor). To make changes, simply click on the information you wish to change and make the desired changes. When a due date is modified the 'Last Updated' and 'Updated By' fields change automatically to indicate the date and time when the docket was last modified and the name of the logged in user who made the change.

To add a new due date or reminder date, first locate existing due dates as outlined above. If a blank due date³ does immediately not appear on the screen then it is necessary to advance to the end of the Due Dates list to a blank due date – this can be accomplished in a number of ways:

- Drag the vertical scroll bar (to the right of the Due Dates list)² to the bottom such that the last (blank) due date is visible; OR
- Click the New Record button¹ , which will cause the list to jump to the last (blank) due date; OR
- Click on any existing due date and then tap the Page Down key on your keyboard until the last (blank) due date is visible;



Then enter the new due date information in the blank due date space. A new blank due date will automatically appear as soon as any information is entered into the previously blank due date. Do not despair, this new blank due date has no bearing (does not exist for all intents and purposes) unless due date information is entered into it.

Notes: It is important to mark due dates completed as they are completed (by entering a check-mark in the 'Completed' box/field) so that they will not thereafter appear on outstanding due date reports.

All due dates (and reminder dates) are included on the Client/File information sheet (see [Client/File Information Label \(for file fly\)](#) for more information in this regard.)

Outstanding Due Date reports are available for a weekly (7 day) or monthly (31-day) period (see [Due Date Reports](#) for more information in this regard.)

SENDING AN EMAIL TO AN EXISTING CLIENT

An email to an existing client, regarding an existing file, can be produced directly from DocketEase, saving time, and eliminating the need to duplicate the entry of client email address information into your email system's address book.

To create an email to a client regarding a particular file:

Locate the desired client and file from the **ADD/EDIT (or VIEW) CLIENT AND FILE INFORMATION** form (see [View, add or edit EXISTING Client and/or File information](#) for more information in this regard).

Once the desired client and file information is on the screen, ensure an email address exists in the eMail field of the **ADD/EDIT (or VIEW) CLIENT AND FILE INFORMATION** form, then click the **Prepare e-Mail to this client re file BELOW** button.

The screenshot shows the DocketEase software interface for adding or editing client and file information. The window title is "DocketEase - [Add / Edit Client and File Information]". The menu bar includes File, Edit, Insert, Records, Window, and Help. The toolbar contains various icons for navigation and actions. The main form area is titled "ADD / EDIT CLIENT AND FILE INFORMATION" and is divided into several sections:

- CLIENT INFORMATION:** This section contains fields for Client Name (Feeney, Jeremy), Client No. (6), Contact (i.e. Mr. Smith), Responsible Lawyer (Joe Blow), Salutation (Mr. Feeney), Address (789 Tenth Street, Ottawa, ON, K1K 1K1), Tel. Number(s) (567-8910), Fax Number(s), and eMail (feeney@yahoo.ca). A "Prepare eMail to this Client re file BELOW" button is circled in red.
- CLIENT FILE(S):** This section contains a table of client files. The first file is "Divorce and Child Custody" with File No. 1000, Client Ref. Family, Resp. Lawyer Joe Blow, and Date Opened 12-Apr-2005. Below the table are fields for "Other People On File (re conflict)", "Notes (re File)", "Billing Address Same", and "Spare1", "Spare2", "Spare3" text fields.

ADDING OR EDITING DOCKETS (Time, Flat Fees or Disbursements)

Viewing Existing Dockets

Existing dockets can be viewed by all DocketEase users. To view existing dockets on a given file:

- A. Locate the desired file from the **ADD/EDIT CLIENT AND FILE INFORMATION** form (see [View, add or edit EXISTING Client and/or File information](#) for more information in this regard), then click the **Add/Edit Dockets (this File)** button;

The screenshot shows the DocketEase software interface. At the top, there is a menu bar with options: File, Edit, Insert, Records, Window, Help. Below the menu bar is a toolbar with various icons and text labels like 'Return to Main Menu', 'Close REPORT', 'Maximize Window', 'Spelling...', 'Print Preview', 'Page Setup...', 'Print...', 'Exit DocketEase', and 'Help/Tips'. The main window title is 'DocketEase - [Add / Edit Client and File Information]'. Below the title bar, there are three buttons: 'Return To Main Menu', 'Prepare Dockets Report (this Client)', 'Prepare Ledger (this Client)', and 'Add/Edit Invoices/Payments (this Client)'. The main content area is titled 'ADD / EDIT CLIENT AND FILE INFORMATION'. Underneath, there is a section for 'CLIENT INFORMATION:' with instructions: 'Select an EXISTING client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.' There are buttons for 'New Client' and 'Existing Clients'. Below this are input fields for Client Name, Client No., Contact, Responsible Lawyer, Salutation, Address, Tel. Number(s), Fax Number(s), eMail, Referred By, and Date Became Client. There is also a 'Prepare eMail to this Client re file BELOW' button. Below the client information is a 'NOTES (re Client):' text area. The next section is 'CLIENT FILE(S):' with buttons for 'Add/Edit Dockets (this File)', 'Prepare Dockets Report (this File)', 'Prepare Ledger (this File)', 'Prepare Invoice (this File)', and 'Prepare Form Letter (this File)'. Below this is another instruction: 'Select an EXISTING file from the 'Client Files' list - OR - Click the 'New File' button then enter file information below.' There are buttons for 'New File' and 'View/Hide Due Dates'. Below this is a table with columns: File No., File Description, Client Ref., File Type, Resp. Lawyer, and Date Opened. The table has several rows with checkboxes for 'Legal Aid', 'File Closed', 'Date Closed', 'Transfer #', 'Moved Off Site', 'Date Moved', and 'Off Site Facility'. Below the table are fields for 'Other People On File (re conflict)', 'Notes (re File)', 'Billing Address Same As Client Address?', 'Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)', and three 'Spare' text fields. At the bottom, there is a 'Return to Main Menu' button and a 'NUM' field.

OR

- B. Search for the desired file by its file number using the File Search feature (see [File Search](#) for more information in this regard), then click the **Add/Edit Docket(s) for this File** button;

DocketEase - [File Information]

File Edit Insert Records Window Help

Return to Main Menu Close REPORT Maximize Window Spelling... Print Preview Page Setup... Print... Exit DocketEase Help/Tips

Find... Find Next Replace... Sort Ascending Sort Descending Filter By Selection Remove Filter/Sort Filter Excluding Selection Export To Word

Return To Main Menu Return To Searches Prepare Dockets Report (this Client) Prepare Ledger (this Client) Add/Edit Invoices/Payments (this Client)

FILE SEARCH RESULTS

Client Name:

Add/Edit Dockets (this File) Prepare Dockets Report (this File) Prepare Ledger (this File) Prepare Invoice (this File) Prepare Form Letter (this File)

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened
1002	Purchase of property at Lot 1, Conc. 10, RR1 Dunrobin (for busir		Real Estate	John R. Dough	23-Aug-2005

Legal Aid	File Closed	Date Closed	Transfer #	Moved Off Site	Date Moved	Off Site Facility
<input type="checkbox"/>	<input type="checkbox"/>		T	<input type="checkbox"/>		

Other People On File (re conflict)
Robert (Bob) Franklin (brother and business partner)

Notes (re File)
Commercially zoned property - intents to build for business (Franklin & Assoc.) Feeney, Jeremy

Billing Address Same As Client Address? Yes - OR - **Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)**

Spare1 (text - 50 char)	Spare2 (text - 150 char)	Spare3 (text - 250 char)	Last Updated	Updated By
			10-Feb-2006	Dough, John

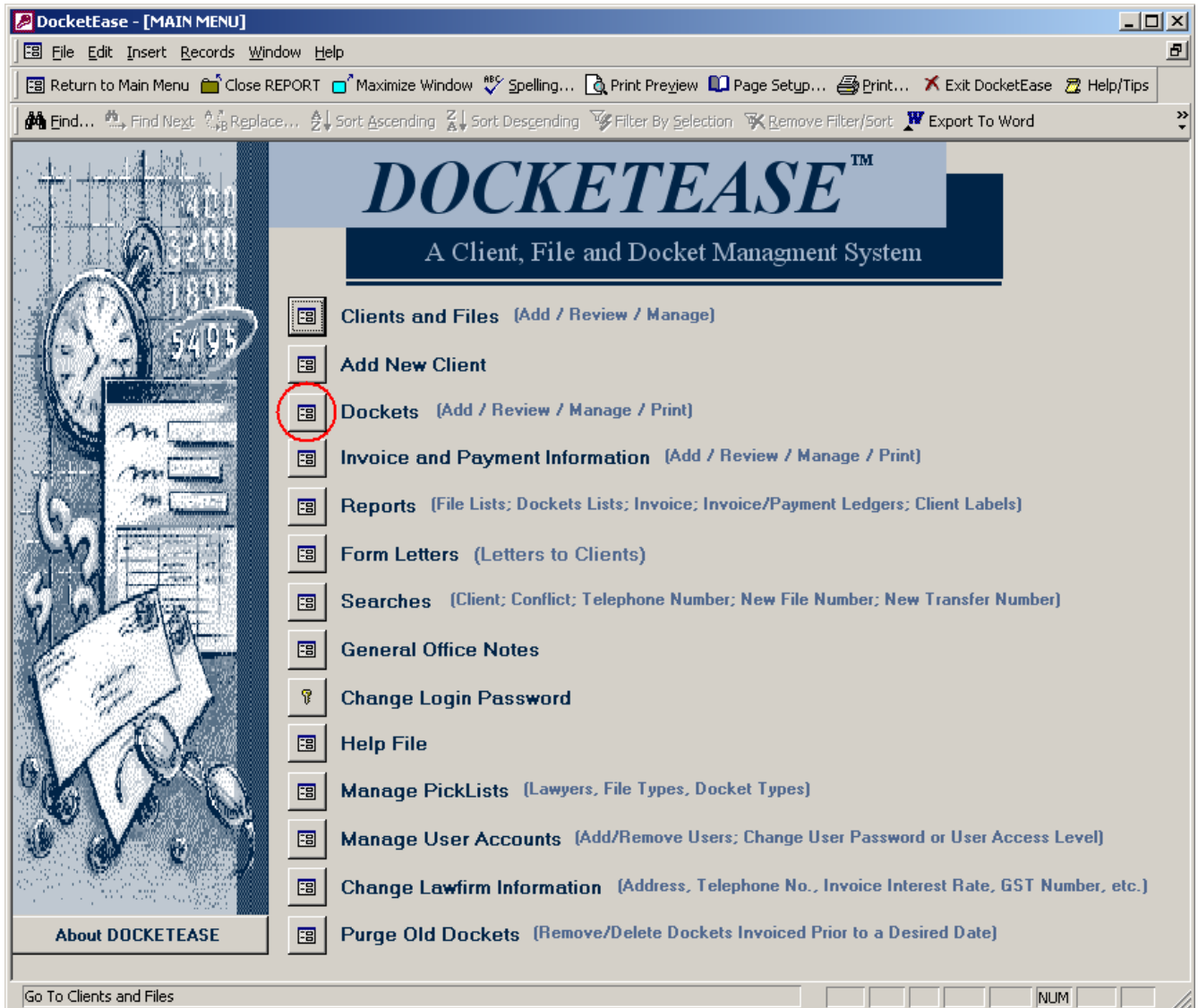
The number of files matching your request are shown below.
To see a particular file, click the (Forward/Back) arrows.

Record: 1 of 4

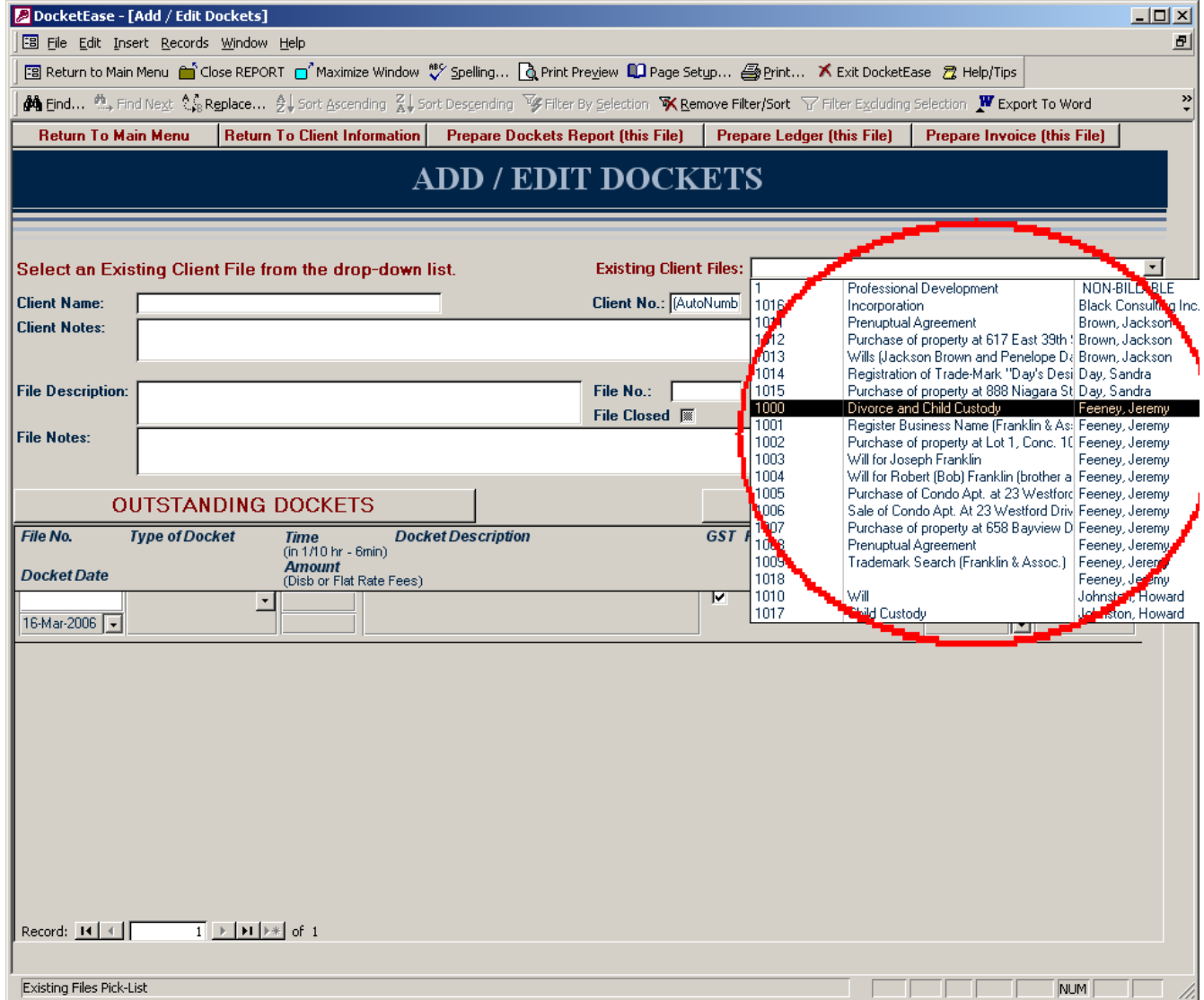
Name of Off Site Storage Facility NUM

OR

C. Click the Dockets button on the DocketEase Main Menu



Then select an existing file in the Existing Client Files drop-down 'pick-list' (files appear in the pick-list in alphabetical order by client name). If you know the file number of the desired file, you can type the file number in the Existing Client Files box (while the pick-list is visible), which will cause the pick-list to jump down the list to the matching file, then either type the Enter key on your keyboard or click on the desired file.



In any case, the **ADD/EDIT (or VIEW) DOCKETS** form will open and be populated with the docket information for the selected file.

ADD / EDIT DOCKETS

Select an Existing Client File from the drop-down list. Existing Client Files:

Client Name: Feeney, Jeremy Client No.: 6 Responsible Lawyer (Client): Joe Blow

Client Notes:

File Description: Divorce and Child Custody File No.: 1000 Responsible Lawyer (File): Joe Blow

File Notes:

File Closed Legal Aid FileType: Family

OUTSTANDING DOCKETS			PREVIOUSLY INVOICED DOCKETS						
File No.	Type of Docket	Time (in 1/10 hr - 6min)	Docket Description	GST	PST	Resp. Lawyer	Invoiced	Invoice No.	Last Updated
Docket Date		Amount (Disb or Flat Rate Fees)					Mark All As Invoiced	Invoice Date	Updated By
1000 25-Nov-2005	Time/Fees	0.4	Letter to client re change to Codicil.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JRD	<input type="checkbox"/>		10-Jan-2006 Dough, John
1000 29-Nov-2005	Time/Fees	0.2	Meet with client to execute Codicil; prepare/execute Affidavit of Execution; Letter to client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JRD	<input type="checkbox"/>		10-Jan-2006 Dough, John
1000 30-Nov-2005	Disb - Court / Filing costs	\$75.00	Payment to Province of Ontario Court Services Division	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JRD	<input type="checkbox"/>		10-Jan-2006 Dough, John
1000 13-Dec-2005	Disb - Court / Filing costs	\$100.00	Payment to Ontario Court General Division Family	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JRD	<input type="checkbox"/>		19-Feb-2006 Dough, John
1000 16-Mar-2006				<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		

Record: 1 of 4

Dockets can then be edited (by Administrators and Editors) by clicking in the field to be changed and making the desired change.


Editing Existing Dockets

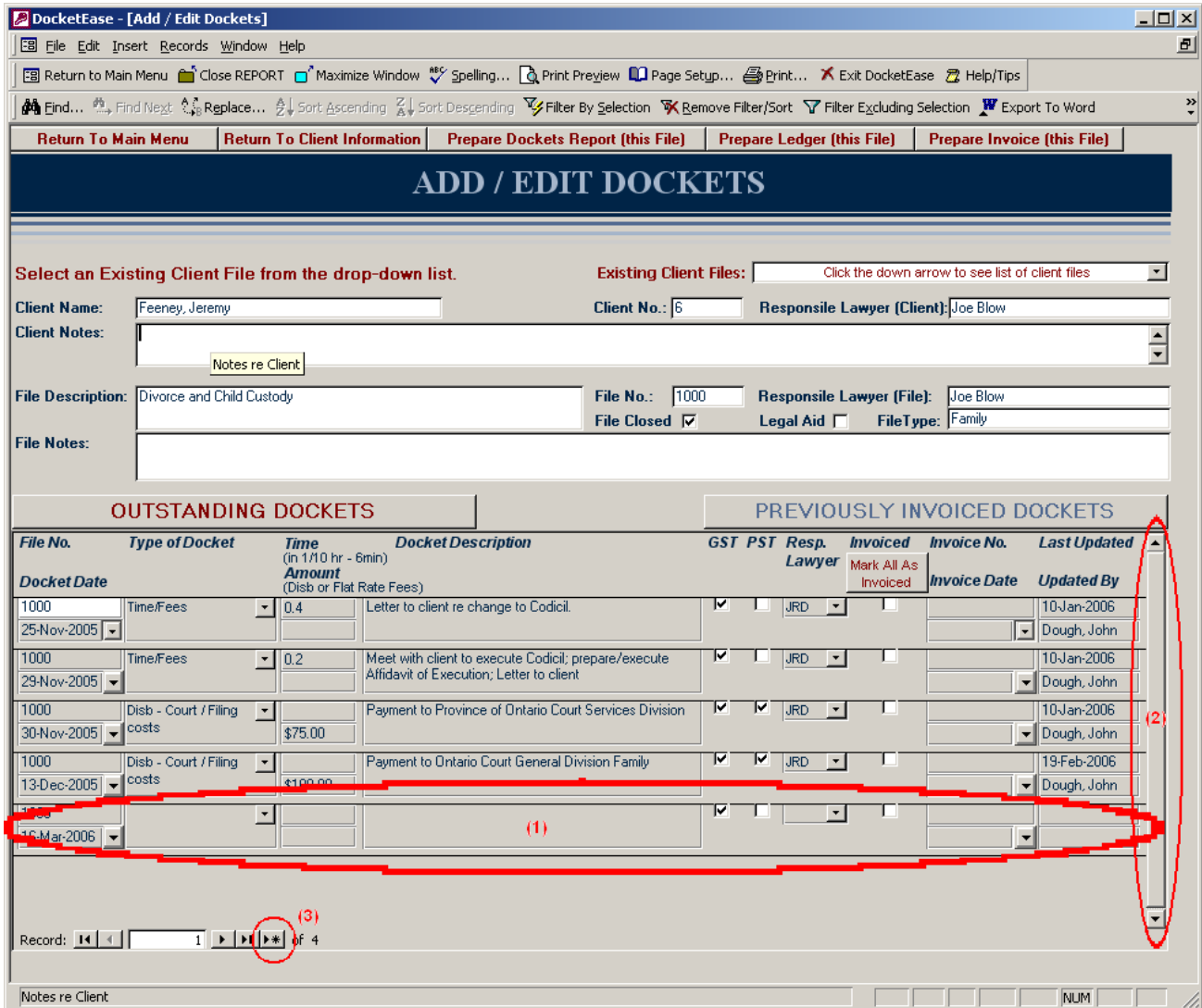
Existing dockets can be edited at any time by an Administrator or Editor, but cannot be edited by a Viewer. To edit an existing docket, first locate the desired file's existing dockets as outlined in the [Viewing and/or Editing Existing Dockets](#) section above. All Outstanding Dockets for the selected file will be displayed in the lower half of the **ADD/EDIT DOCKETS** form. Then simply click on the information you wish to change and make the desired changes. All docket information except 'Last Updated' and 'Updated By' can be modified. When a docket is modified the 'Last Updated' and 'Updated By' fields change automatically to

indicate the date and time when the docket was last modified and the name of the logged in user who made the change.

Creating New Dockets

Dockets can only be added by Administrators and Editors. To add a docket to a particular file, first locate the desired file's existing dockets as outlined in the [Viewing and/or Editing Existing Dockets](#) section above. All Outstanding Dockets for the selected file will be displayed in the lower half of the **ADD/EDIT DOCKETS** form. If a blank docket¹ does not immediately appear on the screen, it is necessary to advance to the end of the Outstanding Dockets list to a blank docket – this can be accomplished in a number of ways:

- Drag the vertical scroll bar (to the right of the Outstanding Dockets list)² to the bottom such that the last (blank) docket is visible; OR
- Click the **New Record** button³ , which will cause the list to jump to the last (blank) docket; OR
- Click on any existing docket and then tap the Page Down key on your keyboard until the last (blank) docket is visible;



ADD / EDIT DOCKETS

Select an Existing Client File from the drop-down list. Existing Client Files:

Client Name: Feeney, Jeremy Client No.: 6 Responsible Lawyer (Client): Joe Blow

Client Notes:

File Description: Divorce and Child Custody File No.: 1000 Responsible Lawyer (File): Joe Blow

File Notes:

File Closed Legal Aid FileType: Family

File No.	Type of Docket	Time (in 1/10 hr - 6min)	Docket Description	GST	PST	Resp. Lawyer	Invoiced	Invoice No.	Last Updated
1000	Time/Fees	0.4	Letter to client re change to Codicil.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JRD	<input type="checkbox"/>		10-Jan-2006
25-Nov-2005									Dough, John
1000	Time/Fees	0.2	Meet with client to execute Codicil; prepare/execute Affidavit of Execution; Letter to client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JRD	<input type="checkbox"/>		10-Jan-2006
29-Nov-2005									Dough, John
1000	Disb - Court / Filing costs		Payment to Province of Ontario Court Services Division	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JRD	<input type="checkbox"/>		10-Jan-2006
30-Nov-2005		\$75.00							Dough, John
1000	Disb - Court / Filing costs		Payment to Ontario Court General Division Family	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JRD	<input type="checkbox"/>		19-Feb-2006
13-Dec-2005		\$100.00							Dough, John
16-Mar-2006			(1)	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		

Record: 1 of 4

Then enter the new docket information in the blank docket space. A new blank docket will automatically appear as soon as any information is entered into the previously blank docket. Do not despair; this new blank docket has no bearing (does not exist for all intents and purposes) unless docket information is entered into it. As information is entered into the new docket the 'Last Updated' and 'Updated By' fields change automatically to indicate the date and time when the docket was last modified and the name of the logged in user who made the change.

Entering Non-Billable Dockets

Non-billable dockets can be entered against client files or non-billable files (under, say, a client called 'Non-Billable') if desired. It is particularly important to enter professional development non-billable time dockets in order to produce an accurate 'Annual Statistics Report' (see [Annual Statistics Report](#) for more information in this regard.)

MANAGING DOCKETS

Moving Dockets from one file to another

A docket cannot be moved from one file to another by simply changing the file number on the misplaced docket. This protection is in place to ensure that dockets are not accidentally moved or misplaced because a file number is inadvertently changed or deleted. Therefore, if it becomes necessary to move a docket from one file to another, the docket information must be 'copied/cut' from its current incorrect file location and pasted into a blank docket on the correct file. The old (now empty) docket can be left on the file for future use, as an empty docket will not cause any ambiguities in reporting or invoicing.

Marking Dockets as Invoiced

Once a docket has been invoiced, it must be manually moved to 'Previously Invoiced Dockets' such that it will not appear again in subsequent invoices. To mark a docket as already invoiced and thereby move it to the 'Previously Invoiced Dockets' tab, put a checkmark in the 'Invoiced' field of the corresponding docket (by clicking once in the checkmark box) and, if desired, enter an invoice number and invoice date.

All dockets on the 'Outstanding Dockets' tab can be quickly marked as invoiced by clicking on the **Mark All As Invoiced** button and then entering an invoice number and date when prompted if desired (rather than entering a checkmark in each 'Invoiced' field and entering an invoice number and date for each docket).

Note: It is not necessary to enter an invoice number or date when a docket has been invoiced and, in fact, may not be worthwhile if dockets are purged/deleted on a fairly regular basis – see [Deleting \(Purging\) Old Already Invoiced Dockets](#) for more information in this regard).

There may be a time when it is desirable to invoice only some of the existing (unbilled) dockets. To do so, do the following:

- Move the docket entries that are not to be invoiced to the 'Previously Invoiced Dockets' tab by entering a checkmark in the 'Invoiced' field of those docket entries (see [Moving Dockets from Previously Invoiced Dockets Back to Outstanding Dockets](#) for assistance in this regard); then
- Prepare the invoice for the file – which will prepare an invoice for only those docket entries remaining on the 'Outstanding Dockets' tab (refer to [REPARING AN INVOICE](#) for assistance in this regard); then
- Mark those invoiced docket entries (currently on the 'Outstanding Dockets' tab) as invoiced (as indicated above); then
- Remove the 'Invoiced' checkmark from the not yet invoiced docket entries (currently on the 'Previously Invoiced Dockets' tab) this will cause them to return to the 'Outstanding Dockets' tab to be invoiced at a later date (refer to [Moving Dockets from Previously Invoiced Dockets Back to Outstanding Dockets](#) for assistance in this regard).

Viewing Previously Invoiced Dockets

When docket entries are marked as invoiced (see [Marking Dockets as Invoiced](#) for assistance in this regard), they are not deleted, but rather moved to the PREVIOUSLY INVOICED DOCKET entries tab on of the **ADD/EDIT DOCKET** form. To see previously invoiced docket entries, click the PREVIOUSLY INVOICED DOCKET entries button/tab. All previously invoice, but not yet purged/deleted, docket entries for the current file will become visible on the **ADD/EDIT DOCKET** form (and the outstanding docket entries will become hidden).

The screenshot shows the 'ADD / EDIT DOCKET' form in the DocketEase application. The 'PREVIOUSLY INVOICED DOCKET' tab is selected and circled in red. The form includes fields for Client Name (Feeney, Jeremy), Client No. (6), Responsible Lawyer (Client) (Joe Blow), File Description (Divorce and Child Custody), File No. (1000), and File Type (Family). Below the tabs, a table displays the following docket entries:

File No.	Type of Docket	Time (In 1/10 hr - 6min)	Docket Description	GST	PST	Recg	Invoiced	Invoice No.	Last Updated
1000 25-Nov-2005	Time/Fees	0.4	Letter to client re change to Codicil.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		10-Jan-2006 Dough, John
1000 29-Nov-2005	Time/Fees	0.2	Meet with client to execute Codicil: prepare/execute Affidavit of Execution; Lette Docket Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		10-Jan-2006 Dough, John
1000 30-Nov-2005	Disb - Court / Filing costs	\$75.00	Payment to Province of Ontario Court Services Division	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		10-Jan-2006 Dough, John
1000 13-Dec-2005	Disb - Court / Filing costs	\$100.00	Payment to Ontario Court General Division Family	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		19-Feb-2006 Dough, John
1000 16-Mar-2006				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

To return to outstanding docket, click the **OUTSTANDING DOCKETS** button/tab. All outstanding dockets for the current file will again become visible (and the previously invoiced dockets will become hidden).

ADD / EDIT DOCKETS

Select an Existing Client File from the drop-down list. Existing Client Files:

Client Name: Client No.: Responsible Lawyer (Client):

Client Notes:

File Description: File No.: Responsible Lawyer (File):

File Notes:

File Closed Legal Aid FileType:

OUTSTANDING DOCKETS | PREVIOUSLY INVOICED DOCKETS

File No.	Type of Docket	Time (in 1/10 hr - 6min)	Docket Description	GST	PST	Resp. Lawyer	Invoiced Mark All As Invoiced	Invoice No.	Invoice Date	Last Updated	Updated By
1000 25-Nov-2005	Time/Fees	0.4	Letter to client re change to Codicil.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JRD	<input type="checkbox"/>			10-Jan-2006	Dough, John
1000 29-Nov-2005	Time/Fees	0.2	Meet with client to execute Codicil; prepare/execute Affidavit of Execution; Letter to client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JRD	<input type="checkbox"/>			10-Jan-2006	Dough, John
1000 30-Nov-2005	Disb - Court / Filing costs		Payment to Province of Ontario Court Services Division	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JRD	<input type="checkbox"/>			10-Jan-2006	Dough, John
1000 13-Dec-2005	Disb - Court / Filing costs		Payment to Ontario Court General Division Family	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JRD	<input type="checkbox"/>			19-Feb-2006	Dough, John
1000 16-Mar-2006				<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>				

Record: of 4

Notes re File NUM

Moving Dockets from Previously Invoiced Dockets Back to Outstanding Dockets

A docket can be moved from PREVIOUSLY INVOICED DOCKETS back to OUTSTANDING DOCKETS simply by removing the Invoiced checkmark. It is recommended that the Invoice Number and Invoice Date also be removed/deleted, if applicable.

ADD / EDIT DOCKETS

Select an Existing Client File from the drop-down list. Existing Client Files:

Client Name: Client No.: Responsible Lawyer (Client):

Client Notes:

File Description: File No.: Responsible Lawyer (File):

File Notes:

File Closed Legal Aid FileType:

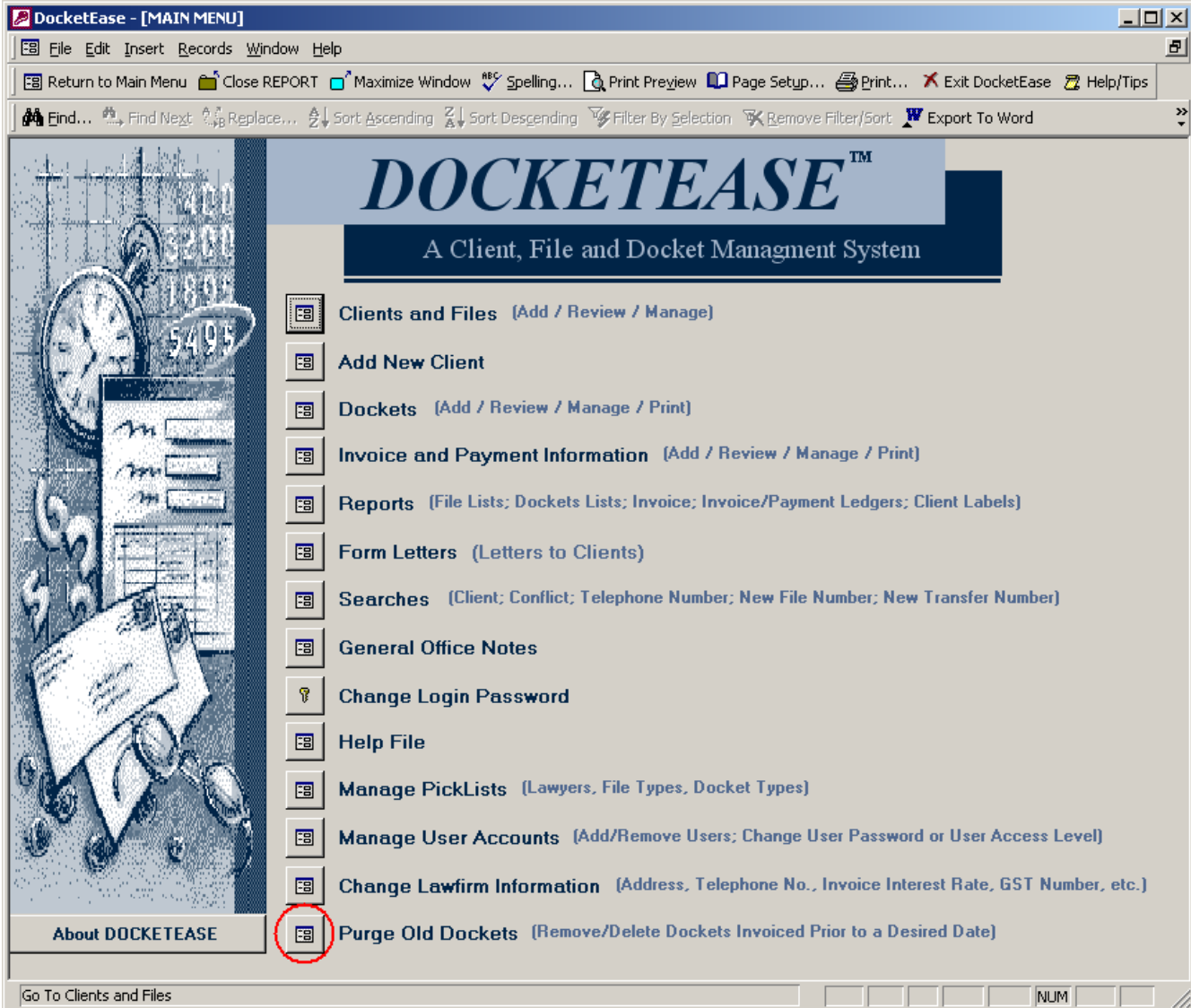
OUTSTANDING DOCKETS		PREVIOUSLY INVOICED DOCKETS							
File No.	Type of Docket	Time (in 1/10 hr - 6min)	Docket Description	GST	PST	Resp. Lawyer	Invoiced	Invoice No.	Last Updated
1000	Time/Fees	0.4	Letter to client re change to Codicil.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JRD	<input type="checkbox"/>		10-Jan-2006
25-Nov-2005									Dough, John
1000	Time/Fees	0.2	Meet with client to execute Codicil; prepare/execute Affidavit of Execution; Letter to client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JRD	<input type="checkbox"/>		10-Jan-2006
29-Nov-2005									Dough, John
1000	Disb - Court / Filing costs		Payment to Province of Ontario Court Services Division	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JRD	<input type="checkbox"/>		10-Jan-2006
30-Nov-2005		\$75.00							Dough, John
1000	Disb - Court / Filing costs		Payment to Ontario Court General Division Family	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JRD	<input type="checkbox"/>		19-Feb-2006
13-Dec-2005		\$100.00							Dough, John
1000				<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		
16-Mar-2006									

Record: of 4

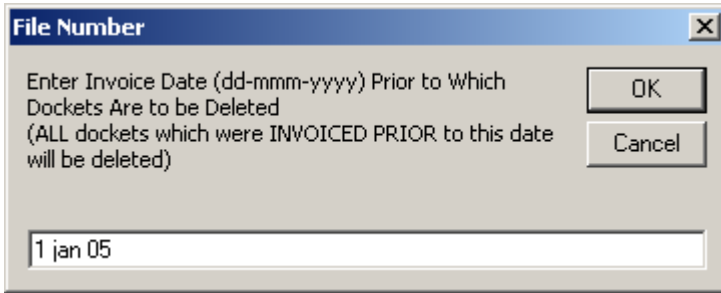
NUM

Deleting (Purging) Old Invoiced Dockets

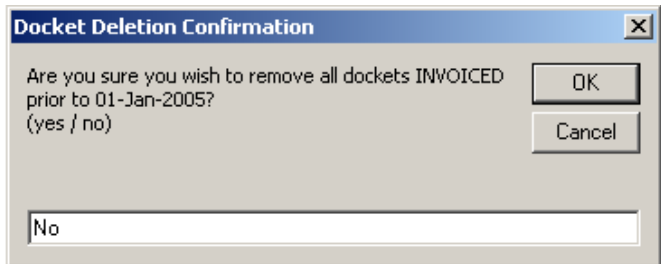
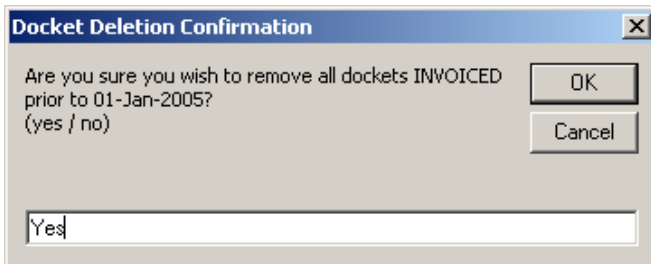
Dockets will never be automatically deleted. However, should it be desirable to remove old (previously invoiced) dockets from the system, this can be manually done by clicking the **PURGE OLD DOCKETS** button on the **DocketEase Main Menu**.



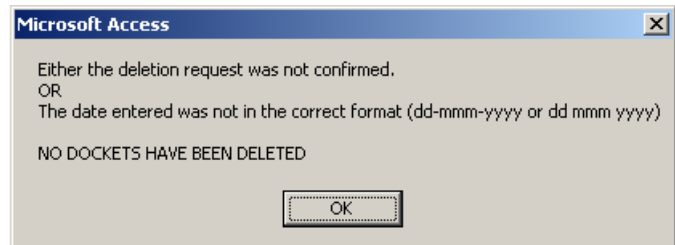
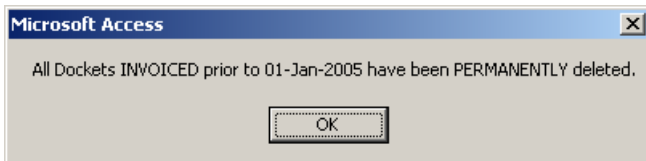
Upon doing so you will be prompted for a date before which previously invoiced dockets should be deleted. Enter the desired 'prior to' invoice date and click the **OK** button to delete old dockets. Clicking the **Cancel** button will cancel the purge request and no dockets will be deleted.



After entering a date and clicking the **OK** button, you will be prompted for a confirmation for the docket deletion, which confirmation will quote the deletion date requested for a final check. Enter **Yes** to confirm the docket deletion or **No** to cancel the docket deletion. Leaving the confirmation box blank will constitute a 'No' response and dockets will not be deleted.



A subsequent message will appear confirm that dockets were, or were not deleted, as is the case.



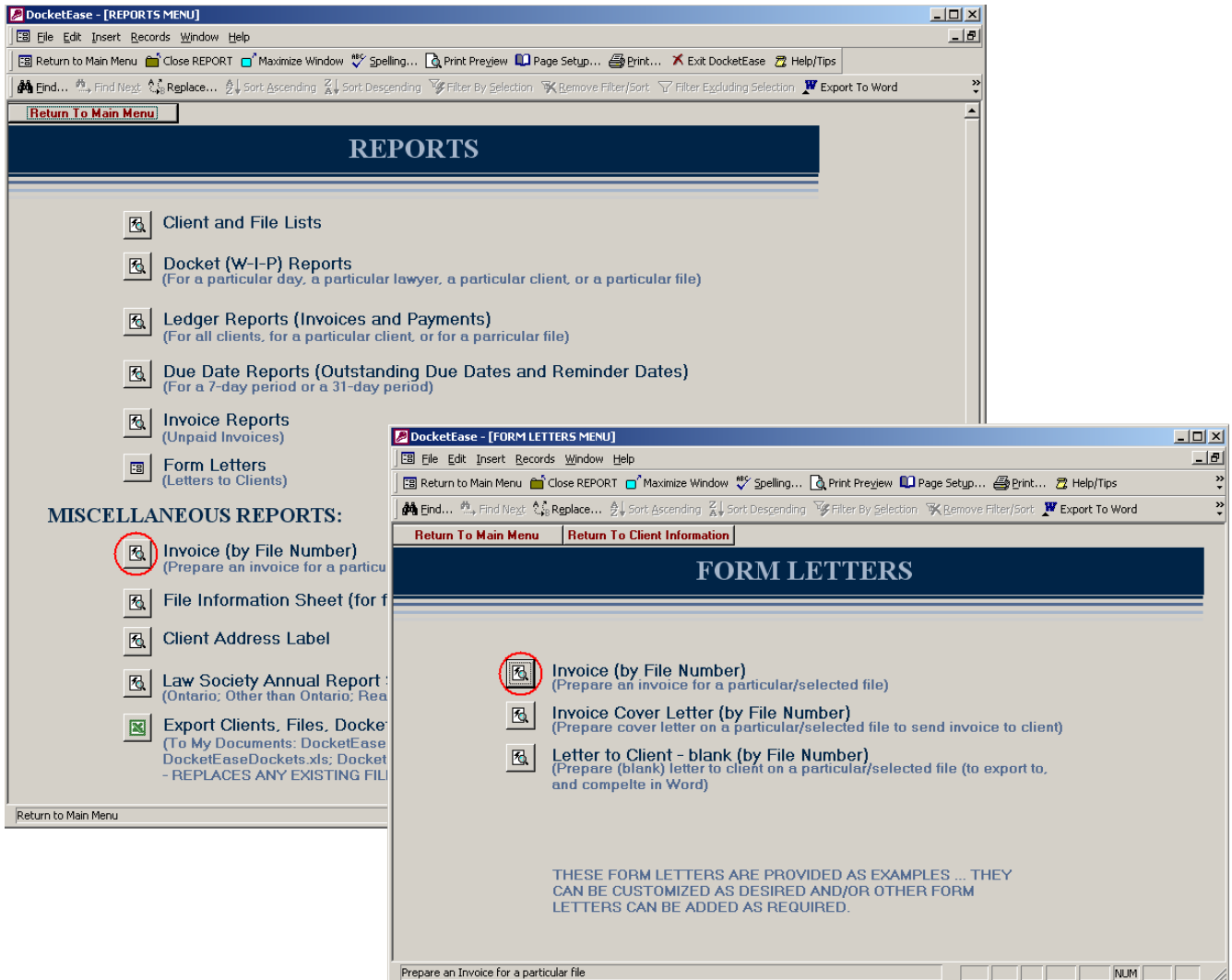
Notes: Dockets invoiced **ON** the entered date **WILL NOT** be deleted. For example, entering 31-dec-05 will **ONLY** delete dockets invoiced on or before December 30th, and not those dockets invoiced on December 31st, 2005. Once dockets have been deleted in this manner, they **CANNOT** be undeleted.

If an 'Annual Statistics Report' is to be accurately generated, it is important that dockets not be purged for any given year until **after** this report is run (see [Annual Statistics Report](#) for more information in this regard.)

PREPARING AN INVOICE

An invoice can be prepared directly from the **REPORTS** and **FORM LETTERS** Menu or from the **ADD/EDIT CLIENT AND FILE INFORMATION** form.

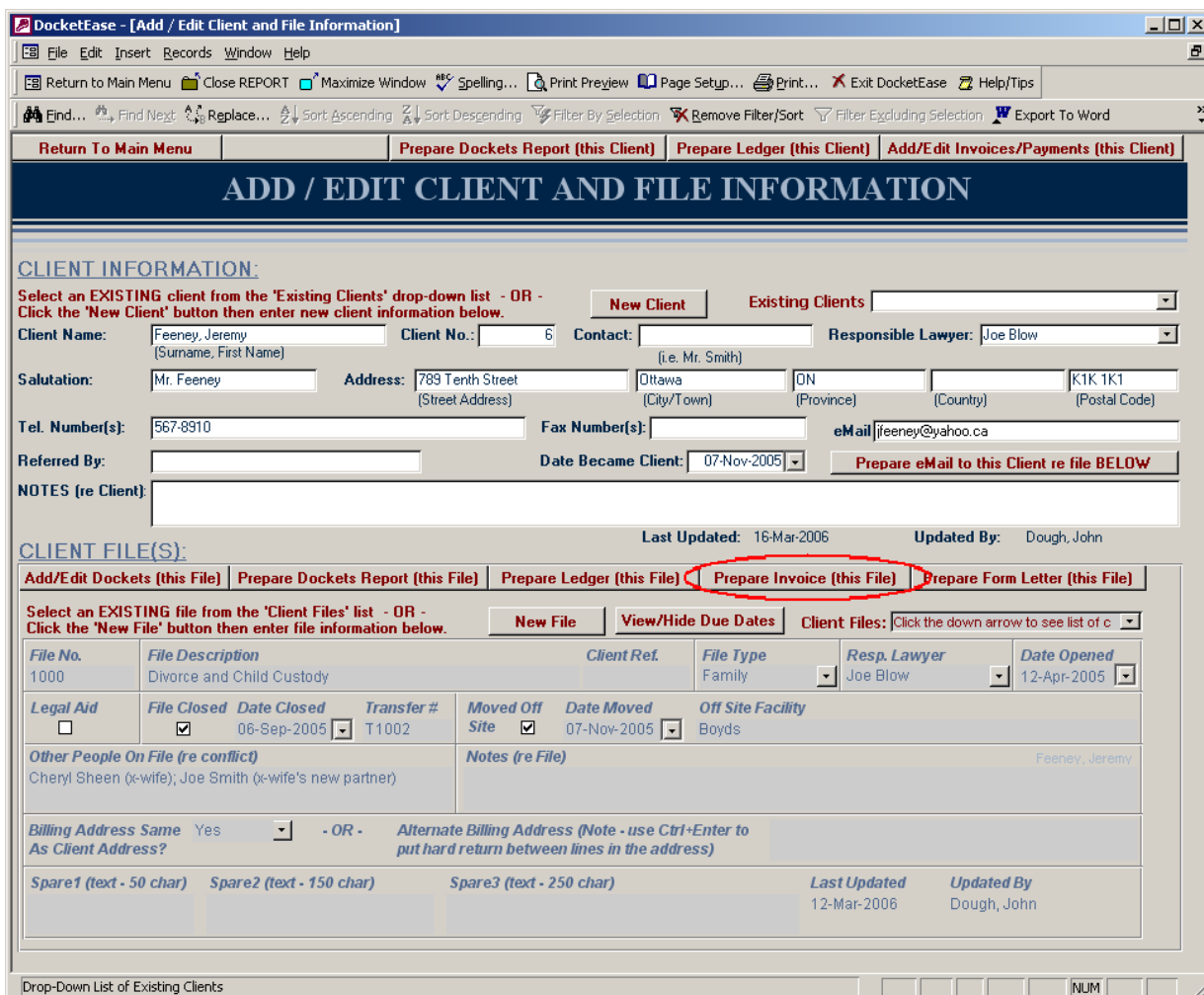
- (1) From the **REPORTS** or **FORM LETTERS** Menus:
Click the **Invoice (by File Number)** button.



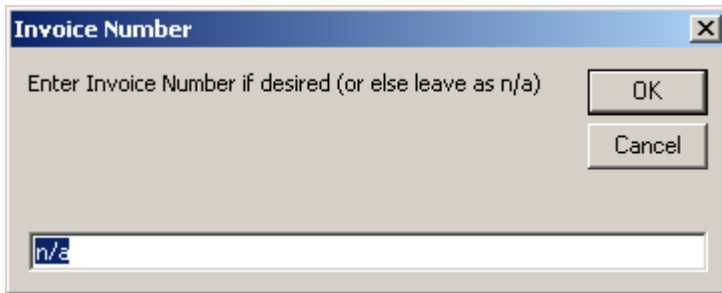
You will then be prompted for the file number of the file for which you wish to produce an invoice. Enter the file number and click the **OK** button to produce a file invoice, or click the **Cancel** button to cancel the invoice production and return to the **REPORTS and FORM LETTERS Menu**.



- (2) From the **ADD/EDIT (or VIEW) CLIENT AND FILE INFORMATION** form: First, select an existing client and file (see [View, add or edit EXISTING Client and/or File information](#) for additional information in this regard). Once the desired file is visible in the CLIENT FILE(S) section (in the lower half of the form), click the **Prepare Invoice (this File)** button.



In either case, you will then be prompted for an invoice number. Should you wish to number your invoices, enter the appropriate invoice number in the space provided and click the OK button. Clicking the Cancel button has the same effect as clicking the OK button.



An up-to-date invoice for requested file will then be produced. If an invoice number was entered it will appear on the invoice, if it was left as 'n/a' (or blank) nothing will appear in the invoice number space. It will automatically list fee docket; total hourly fees (by billing rate); total hourly and flat-rate fees; calculate GST on fees; group disbursement dockets by disbursement type; total disbursements; calculate GST on disbursements; calculate PST on applicable disbursements; total invoice; and deduct any remaining trust/deposit on the file.

Copies of the invoice can then be printed to send to the client and keep on file by clicking the **Print** button on the Toolbar, or can be exported to MS Word for editing or saving, by clicking the **Export to Word** button on the Toolbar.

Notes: Invoices are NOT saved in DocketEase so if you wish to keep an electronic copy of the invoice it should be exported to MS Word and saved in an appropriate place. See [Exporting Reports to Word or Excel](#) for details in this regard.

Invoiced dockets are NOT automatically marked as 'Invoiced'. Therefore, once an invoice has been finalized and sent to the client, it is necessary to mark the dockets pertaining to the invoice as having been invoiced. See [Marking Dockets as Invoiced](#) for details in this regard.

Invoices rendered are NOT automatically entered into 'Invoice and Payment Information'. Therefore, once an invoice has been finalized, it is necessary to enter the invoice information into 'Invoice and Payment Information'. See [ENTERING INVOICE AND PAYMENT INFORMATION](#) for details in this regard.

Sample Invoice:

Your Firm Name
Your Firm's Street Address
Your Firm's City, Province
Your Firm's Postal Code
Your Firm's Telephone Number and Fax Number

March 16, 2006

Invoice #: 2006-104

G.S.T. #: Your GST Number

Feeney, Jeremy
789 Tenth Street
Ottawa, ON
K1K1K1

Re: Purchase of Condo Apt. at 23 Westford Drive, Apt 302, Ottawa, ON
Our File No. 1005

To professional fees for:

17-Nov-2005	Telephone conversation with client	(0.20)
29-Nov-2005	Telephone conversation with client	(0.10)
13-Dec-2005	Telephone conversation with client re possible arrangement with hush	(0.50)
30-Nov-2005	Networking discount	-\$25.00
	- 0.80 hrs @ \$60.00 per hr = \$48.00	

Total Fees: \$23.00

GST (7%) on Fees: \$1.61

Disbursements:	- Court / Filing costs	\$50.00
	- Long Distance	\$0.50
	- Photocopy	\$2.00
	- Stamps	\$5.50

Total Disbursements: \$58.00

GST (7%) on Disbursements: \$4.06

PST (8%) on Applicable Disbursements: \$0.48

INVOICE TOTAL: \$87.15

YOUR FIRM NAME
Per: Jane Doe
E. & O. E.

Cheques paid on account should be made payable to Your Firm Name; retainer cheques should be made payable to Your Firm Name In Trust.

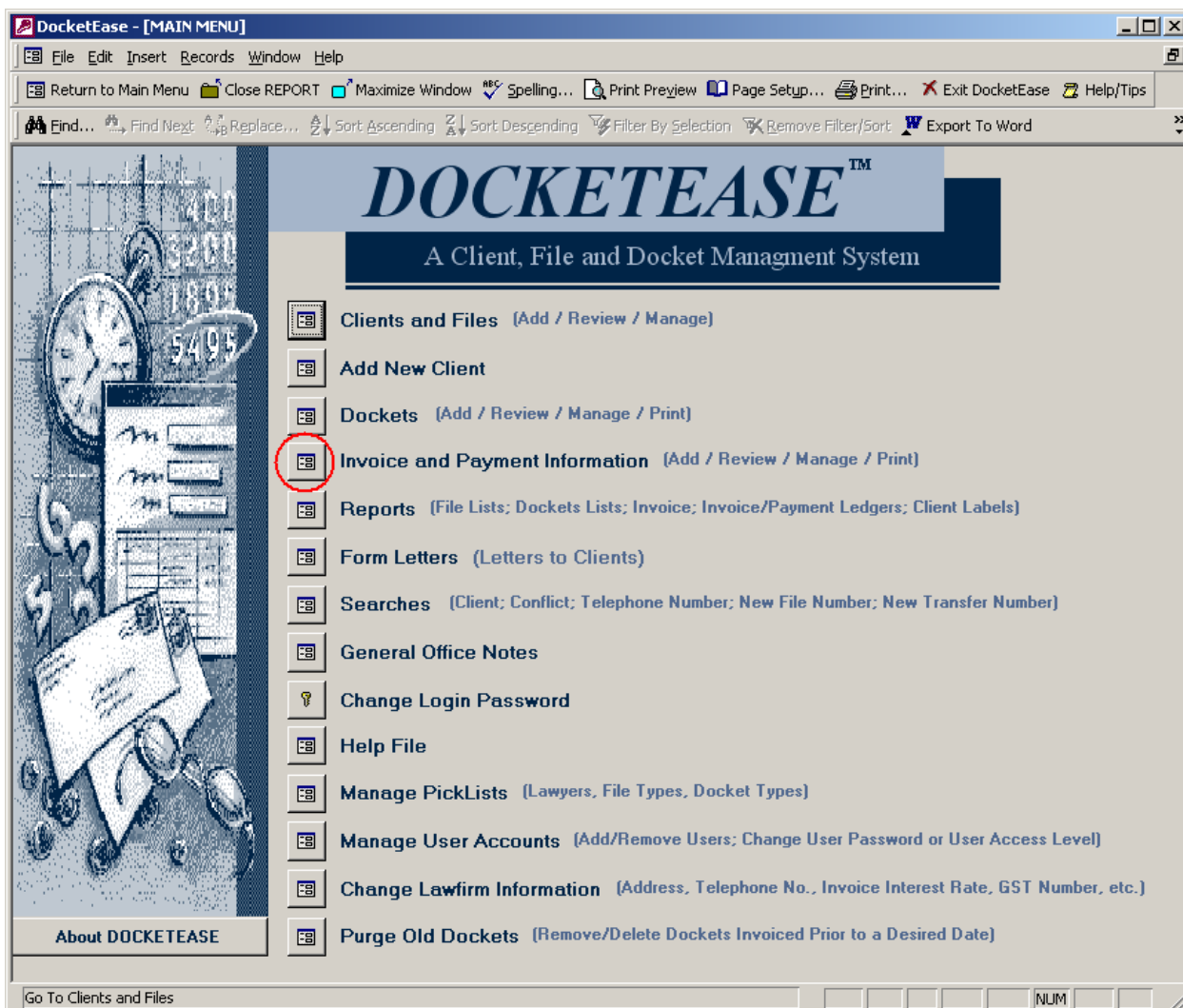
Payment is due when this invoice is rendered to you. Pursuant to the Solicitors Act, interest is charged on outstanding accounts at the rate of 3.6% per year. Interest will be applied commencing on the 30th day after the date the invoice is issued.

ENTERING INVOICE AND PAYMENT INFORMATION

Invoices rendered are NOT entered into 'Invoice and Payment Information' automatically. Therefore, once an invoice has been finalized, it is necessary to enter the invoice information into 'Invoice and Payment Information' in order to be able to produce accurate Invoice/Payment reports.

Invoices rendered and payments received can be entered directly from the **Main Menu** or from the **ADD/EDIT CLIENT AND FILE INFORMATION** form.

- (1) From the Main Menu:
Click the **Invoice Payment Information** button.



This will open the *CLIENT ACCOUNT/PAYMENT INFORMATION* form (below), which will NOT immediately display any client account or payment information.

To select an existing client, click the down arrow in the Existing Clients box to reveal a 'pick-list' of existing clients (in alphabetical order). If you know the name of the desired client, you can thereafter type the first few letters of the client name in the Existing Clients box (while the pick-list is visible), which will cause the pick-list to jump down the list to the first matching client. Then either type the Enter key on your keyboard or click on the desired client.

DocketEase - [Invoice and Payment Information for Client]

File Edit Insert Records Window Help

Return to Main Menu Close REPORT Maximize Window Spelling... Print Preview Page Setup... Print... Exit DocketEase Help/Tips

Find... Find Next Replace... Sort Ascending Sort Descending Filter By Selection Remove Filter/Sort Filter Excluding Selection Export To Word

Return To Main Menu Return To Client Information Prepare Ledger Report (this Client)

CLIENT INVOICE / PAYMENT INFORMATION

Select an Existing Client from the drop-down list. Existing Clients:

INVOICES to:

File No.	Paid	Invoice Notes	Invoice No.	Invoice Date	Fees	Fees G	total
			n/a	16-Mar-2006			

Record: 1 of 1

PAYMENTS by:

File No.	Payment Date	Payment Amount	Payment Notes	Last Updated	Updated By
	16-Mar-2006				

Record: 1 of 1

Drop-Down List of Existing Clients

NUM

- (2) From the **ADD/EDIT CLIENT AND FILE INFORMATION** form:
 First, select an existing client (see [View, add or edit EXISTING Client and/or File information](#) for additional information in this regard). Once the desired client is visible in the CLIENT INFORMATION section (in the upper half of the form), click the Add Invoice/Payment for Client button.

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:
 Select an EXISTING client from the 'Existing Clients' drop-down list - OR -
 Click the 'New Client' button then enter new client information below.

Client Name: Feeney, Jeremy Client No.: 6 Contact: (i.e. Mr. Smith) Responsible Lawyer: Joe Blow

Salutation: Mr. Feeney Address: 789 Tenth Street Ottawa ON K1K 1K1
 (Street Address) (City/Town) (Province) (Country) (Postal Code)

Tel. Number(s): 567-8910 Fax Number(s): eMail: jfeeney@yahoo.ca

Referred By: Date Became Client: 07-Nov-2005 Prepare eMail to this Client re file BELOW

NOTES (re Client):

Last Updated: 16-Mar-2006 Updated By: Dough, John

CLIENT FILE(S):

Add/Edit Dockets (this File) Prepare Dockets Report (this File) Prepare Ledger (this File) Prepare Invoice (this File) Prepare Form Letter (this File)

Select an EXISTING file from the 'Client Files' list - OR -
 Click the 'New File' button then enter file information below.

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened	
1000	Divorce and Child Custody		Family	Joe Blow	12-Apr-2005	
<input type="checkbox"/>	<input checked="" type="checkbox"/> File Closed	Date Closed: 06-Sep-2005	Transfer #: T1002	<input checked="" type="checkbox"/> Moved Off Site	Date Moved: 07-Nov-2005	Off Site Facility: Boyds
Other People On File (re conflict) Cheryl Sheen (x-wife); Joe Smith (x-wife's new partner)			Notes (re File) Feeney, Jeremy			

Billing Address Same As Client Address? Yes - OR - Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)

Spare1 (text - 50 char) Spare2 (text - 150 char) Spare3 (text - 250 char) Last Updated: 12-Mar-2006 Updated By: Dough, John

Drop-Down List of Existing Clients

In either case, the **CLIENT ACCOUNT/PAYMENT INFORMATION** form will be populated with the account and payment information for the selected client.

To enter account/invoice rendered information, first click the down arrow in the File Number field of the last (blank) row (record) in the 'INVOICES to' (top) section of the form to reveal a 'pick-list' of existing files for the displayed client (in chronological order by file number). Then click on the file to which the invoice pertains in the pick-list, which will cause the file number to appear in the File Number field, and then enter the rest of the invoice information in the spaces provided (Invoice No., Invoice Date, Fees, Disbursements, Taxes and Invoice Total).

CLIENT INVOICE / PAYMENT INFORMATION

Select an Existing Client from the drop-down list. Existing Clients: Feeney, Jeremy

INVOICES to:

File No.	Paid	Invoice Notes	Invoice No.	Invoice Date	Fees	Fees GST	Disb.	Disb. GST	Disb. PST	Invoice Total
1000	<input checked="" type="checkbox"/>		n/a	19-Jul-2005	\$300.00	\$21.00	\$10.00	\$0.70	\$0.00	\$331.70
1000	<input checked="" type="checkbox"/>		n/a	17-Aug-2005	\$100.00	\$7.00	\$50.00	\$3.50	\$0.00	\$160.50
1000	<input checked="" type="checkbox"/>	Paid from retainer	n/a	18-Nov-2005	\$100.00	\$7.00	\$20.00	\$1.40	\$0.20	\$128.60
1003	<input type="checkbox"/>	Test	n/a	03-Feb-2006	\$400.00	\$28.00	\$0.00	\$0.00	\$0.00	\$428.00
	<input type="checkbox"/>		n/a	16-Mar-2006						

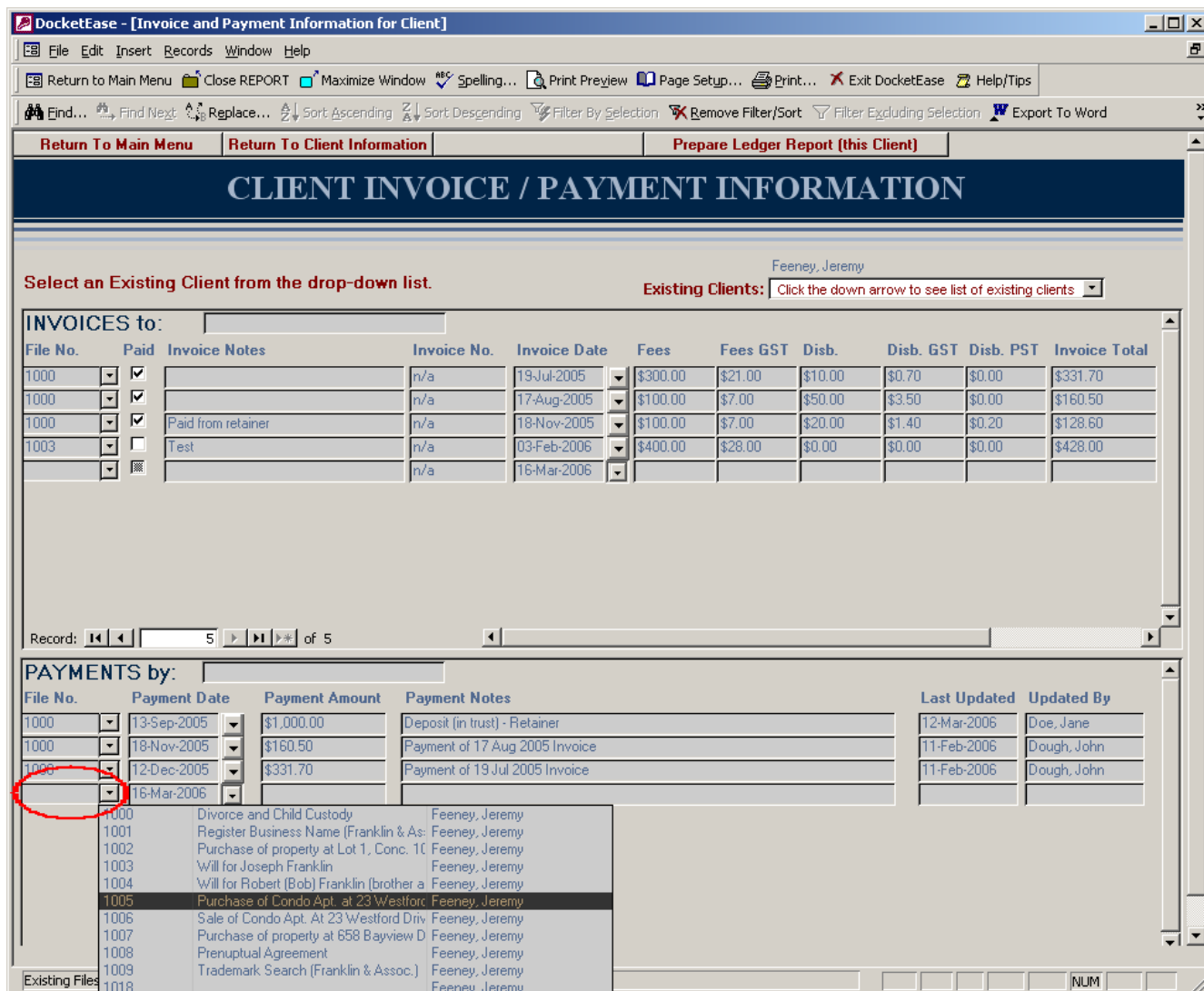
Record: 1000

PAYMENTS by:

File No.	Payment Date	Payment Amount	Payment Notes	Last Updated	Updated By
1000	13-Sep-2005	\$1,000.00	Deposit (in trust) - Retainer	12-Mar-2006	Doe, Jane
1000	18-Nov-2005	\$160.50	Payment of 17 Aug 2005 Invoice	11-Feb-2006	Dough, John
1000	12-Dec-2005	\$331.70	Payment of 19 Jul 2005 Invoice	11-Feb-2006	Dough, John
	16-Mar-2006				

Note: It is important that invoices are marked 'paid' when payment is received (by entering a check-mark in the Paid check-mark box/field) so that paid invoices will not appear on Outstanding Invoice reports (see [Outstanding Invoice Reports](#) for more information in this regard.)

To enter payments received information, first click the down arrow in the File Number field of the last (blank) row (record) in the 'PAYMENTS by' (bottom) section of the form to reveal a 'pick-list' of existing files for the displayed client (in chronological order by file number). Then click on the file to which the payment pertains in the pick-list, which will cause that file number to appear in the File Number field, and then enter the rest of the payment information in the spaces provided (Payment Date, Payment Amount, and Payment Notes).



PREPARING INVOICE/PAYMENT LEDGERS

There are three different Invoice and Payment Ledger's available, all of which are totalled by file:

1. All clients and their files – in alphabetical order by client.
2. All files for a particular client – in chronological order by file.
3. One particular file – Invoices and Payments.

These reports are available directly from the **REPORTS and FORM LETTERS Menu**, from the **ADD/EDIT CLIENT AND FILE INFORMATION** form or from the **CLIENT ACCOUNT/PAYMENT INFORMATION** form. Once generated (on the screen), these reports can be printed by clicking the **Print** button on the Toolbar, or can be exported to MS Word or MS Excel for editing or saving by clicking either the **Export to Word** or **Export to Excel** button on the Toolbar. To close a report, click the **Close (Report/Form)** button on the Toolbar.

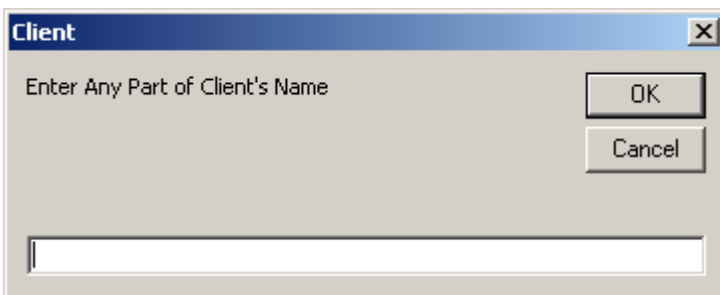
- (1) From the **REPORTS and FORM LETTERS Menu**:
Click the **Ledger Reports** button on the **REPORTS Menu**, then click the appropriate **Ledger** button, depending on which ledger report is desired (i.e. all clients, all files for a particular client, or a particular file).





In the case of the All Clients report, the report will immediately be produced on the screen. The report can then be printed by clicking the **Print** button on the Toolbar or can be exported to Word or Excel for editing or saving.

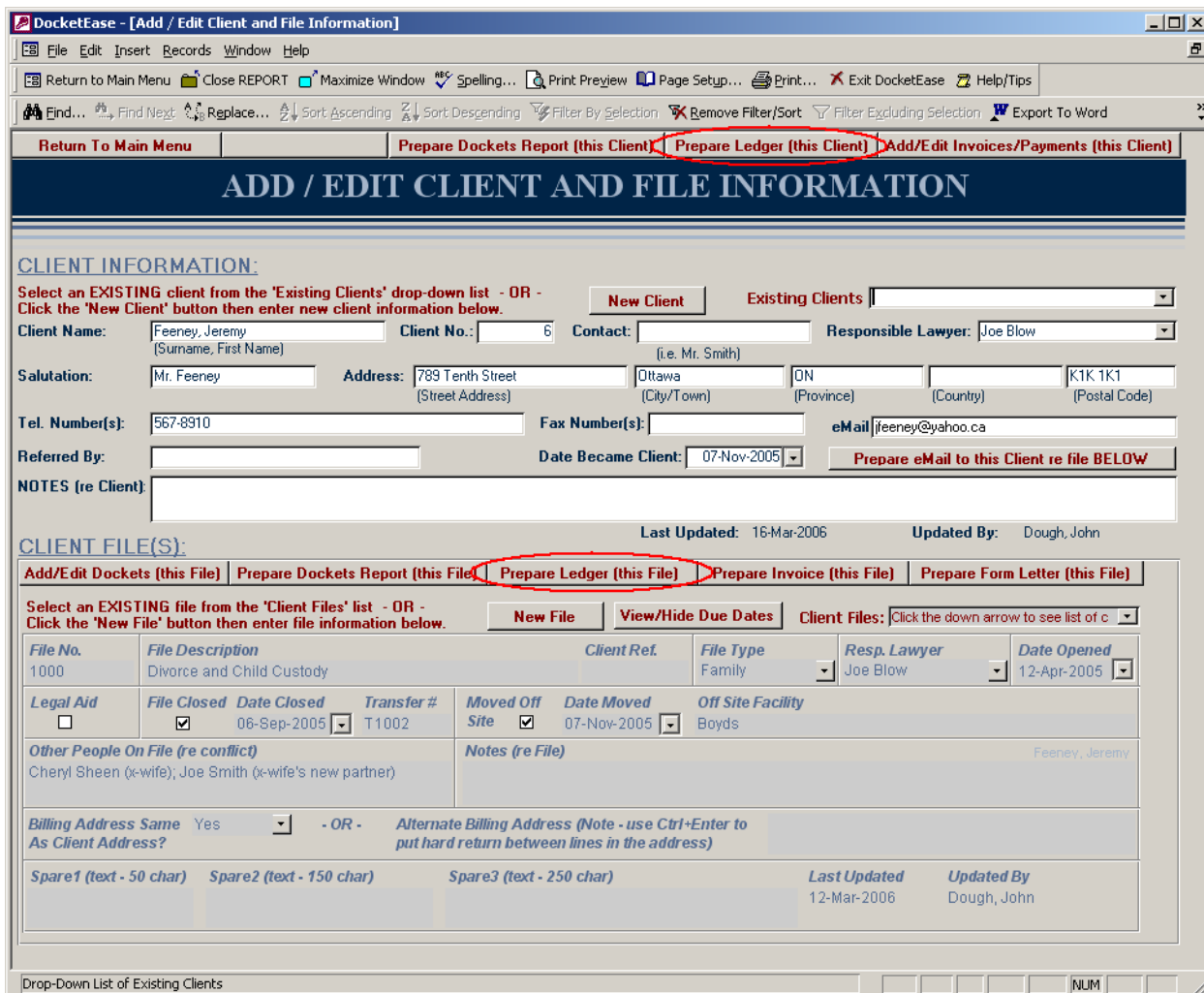
In the case of a Client report, you will be prompted for any part of the client's name. Enter part of the client's name and then click the **OK** button, or click the **Cancel** button to cancel the report request. It is not necessary to enter the client's full name, but keep in mind the more characters that are entered, the more the chance of getting only one client. If there is more than one client with the characters entered, the resulting report will contain all clients matching the entered characters. If there are no clients matching the string of characters entered a blank report will be produced.



In the case of a File report, you will be prompted for the file number of the desired file. Enter the file number and then click the **OK** button or click the **Cancel** button to cancel the report request. The file number **MUST** be entered in its entirety, as a partial file number will produce a blank report.



- (2) From the **ADD/EDIT (or VIEW) CLIENT AND FILE INFORMATION** form: First, select an existing client and file (see [View, add or edit EXISTING Client and/or File information](#) for additional information in this regard). Once the desired client and file are visible in the **ADD/EDIT (or VIEW) CLIENT AND FILE INFORMATION** form, click either the **Prepare Ledger (this Client)** button (to produce a client report) or the **Prepare Ledger (this File)** button (to produce a file report).



- (3) From the **CLIENT INVOICE/PAYMENT INFORMATION** form:
First, select an existing client (see [ENTERING INVOICE AND PAYMENT INFORMATION](#) for additional information in this regard), and then click the **Prepare Ledger Report (this Client)** button (to produce a client report). A file report is not available from this form.

CLIENT INVOICE / PAYMENT INFORMATION

Select an Existing Client from the drop-down list. Existing Clients: Feeney, Jeremy. Click the down arrow to see list of existing clients

INVOICES to: Feeney, Jeremy

File No.	Paid	Invoice Notes	Invoice No.	Invoice Date	Fees	Fees GST	Disb.	Disb. GST	Disb. PST	Invoice Total
1000	<input checked="" type="checkbox"/>		n/a	19-Jul-2005	\$300.00	\$21.00	\$10.00	\$0.70	\$0.00	\$331.70
1000	<input checked="" type="checkbox"/>		n/a	17-Aug-2005	\$100.00	\$7.00	\$50.00	\$3.50	\$0.00	\$160.50
1000	<input checked="" type="checkbox"/>	Paid from retainer	n/a	18-Nov-2005	\$100.00	\$7.00	\$20.00	\$1.40	\$0.20	\$128.60
1003	<input type="checkbox"/>	Test	n/a	03-Feb-2006	\$400.00	\$28.00	\$0.00	\$0.00	\$0.00	\$428.00
	<input type="checkbox"/>		n/a	16-Mar-2006						

Record: 1 of 4

PAYMENTS by: Feeney, Jeremy

File No.	Payment Date	Payment Amount	Payment Notes	Last Updated	Updated By
1000	13-Sep-2005	\$1,000.00	Deposit (in trust) - Retainer	12-Mar-2006	Doe, Jane
1000	18-Nov-2005	\$160.50	Payment of 17 Aug 2005 Invoice	11-Feb-2006	Dough, John
1000	12-Dec-2005	\$331.70	Payment of 19 Jul 2005 Invoice	11-Feb-2006	Dough, John
	16-Mar-2006				

Record: 1 of 3

Return to Main Menu

Sample All Clients and Files Invoice/Payment Report:

Invoice/Payment Ledger - All Clients

CLIENT: Black, John

File No.: 1016

File Description: Purchase of property at 999 Borland Dr., Ottawa, ON

Balance Owing: \$0.00

CLIENT: Brown, Jackson

File No.: 1011

File Description: Prenuptial Agreement

Balance Owing: \$0.00

File No.: 1012

File Description: Purchase of property at 617 East 39th Street, Hamilton, ON

Balance Owing: \$0.00

CLIENT: Day, Sandra

File No.: 1014

File Description: Registration of Trade-Mark "Day's Designer Nails"

Balance Owing: \$0.00

CLIENT: Feeney, Jeremy

File No.: 1000

File Description: Divorce and Child Custody

INVOICES

<i>Invoice Date</i>	<i>Invoice No.</i>	<i>Invoice Notes</i>	<i>Fees</i>	<i>Disb</i>	<i>Taxes</i>	<i>Total Paid</i>	
19-Jul-2005	n/a		\$300.00	\$10.00	\$21.70	\$331.70	<input checked="" type="checkbox"/>
17-Aug-2005	n/a		\$100.00	\$50.00	\$10.50	\$160.50	<input checked="" type="checkbox"/>
18-Nov-2005	n/a	Paid from retainer	\$100.00	\$20.00	\$8.60	\$128.60	<input checked="" type="checkbox"/>
Invoices Total:			\$500.00	\$80.00	\$40.80	\$620.80	

PAYMENTS

<i>Payment Date</i>	<i>Payment Notes</i>	<i>Payment Amount</i>
13-Sep-2005	Deposit (in trust) - Retainer	\$1,000.00
18-Nov-2005	Payment of 17 Aug 2005 Invoice	\$160.50
12-Dec-2005	Payment of 19 Jul 2005 Invoice	\$331.70
Payments Total:		\$1,492.20

Balance Owing: -\$871.40

Sample Client Invoice/Payment Report:

Client Invoice/Payment Ledger

CLIENT: Feeney, Jeremy

File No.: 1000

File Description: Divorce and Child Custody

INVOICES

<i>Invoice Date</i>	<i>Invoice No.</i>	<i>Invoice Notes</i>	<i>Fees</i>	<i>Dish</i>	<i>Taxes</i>	<i>Total Paid</i>	
19-Jul-2005	n/a		\$300.00	\$10.00	\$21.70	\$331.70	<input checked="" type="checkbox"/>
17-Aug-2005	n/a		\$100.00	\$50.00	\$10.50	\$160.50	<input checked="" type="checkbox"/>
18-Nov-2005	n/a	Paid from retainer	\$100.00	\$20.00	\$8.60	\$128.60	<input checked="" type="checkbox"/>
Invoices Total:			\$500.00	\$80.00	\$40.80	\$620.80	

PAYMENTS

<i>Payment Date</i>	<i>Payment Notes</i>	<i>Payment Amount</i>
13-Sep-2005	Deposit (in trust) - Retainer	\$1,000.00
18-Nov-2005	Payment of 17 Aug 2005 Invoice	\$160.50
12-Dec-2005	Payment of 19 Jul 2005 Invoice	\$331.70
Payments Total:		\$1,492.20

Balance Owing: -\$871.40

File No.: 1001

File Description: Register Business Name (Franklin & Assoc.)

Balance Owing: \$0.00

File No.: 1002

File Description: Purchase of property at Lot 1, Conc. 10, RR1 Dunrobin (for business)

Balance Owing: \$0.00

Sample File Invoice/Payment Report:

File Invoice/Payment/Trust Ledger

CLIENT: Feeney, Jeremy
FILE NO.: 1000
FILE DESCRIPTION: Divorce and Child Custody

INVOICES

<i>Invoice Date</i>	<i>Invoice No.</i>	<i>Invoice Notes</i>	<i>Fees</i>	<i>Disb</i>	<i>Taxes</i>	<i>Total Paid</i>	
19-Jul-2005	n/a		\$300.00	\$10.00	\$21.70	\$331.70	<input checked="" type="checkbox"/>
17-Aug-2005	n/a		\$100.00	\$50.00	\$10.50	\$160.50	<input checked="" type="checkbox"/>
18-Nov-2005	n/a	Paid from retainer	\$100.00	\$20.00	\$8.60	\$128.60	<input checked="" type="checkbox"/>
Invoices Total:			\$500.00	\$80.00	\$40.80	\$620.80	

PAYMENTS

<i>Payment Date</i>	<i>Payment Notes</i>	<i>Payment Amount</i>
13-Sep-200	Deposit (in trust) - Retainer	\$1,000.00
18-Nov-200	Payment of 17 Aug 2005 Invoice	\$160.50
12-Dec-200	Payment of 19 Jul 2005 Invoice	\$331.70
Payments Total:		\$1,492.20

Balance Owing: **-\$871.40**

RUNNING A CONFLICT SEARCH

A conflict search will search through all 'Client Name', all 'File Description' and 'Other People On File (re conflict)' fields for a string of characters as specified in the search request.

ADD / EDIT CLIENT AND FILE INFORMATION

CLIENT INFORMATION:
Select an EXISTING client from the 'Existing Clients' drop-down list - OR - Click the 'New Client' button then enter new client information below.

Client Name: Feeney, Jeremy (Surname, First Name) **Client No.:** 6 **Contact:** [Field] **Responsible Lawyer:** Joe Blow

Salutation: Mr. Feeney **Address:** 789 Tenth Street (Street Address) Ottawa (City/Town) ON (Province) [Field] (Country) K1K 1K1 (Postal Code)

Tel. Number(s): 567-8910 **Fax Number(s):** [Field] **eMail:** feeney@yahoo.ca

Referred By: [Field] **Date Became Client:** 07-Nov-2005 **Prepare eMail to this Client re file BELOW**

NOTES (re Client): [Field]

CLIENT FILE(S): Last Updated: 16-Mar-2006 Updated By: Dough, John

File No. 1000 **File Description** Divorce and Child Custody **Client Ref.** [Field] **File Type** Family **Resp. Lawyer** Joe Blow **Date Opened** 12-Apr-2005

Legal Aid	File Closed	Date Closed	Transfer #	Moved Off Site	Date Moved	Off Site Facility
<input type="checkbox"/>	<input type="checkbox"/>	[Field]	T1002	<input checked="" type="checkbox"/>	07-Nov-2005	Boyds

Other People On File (re conflict) Notes (re File) Feeney, Jeremy
Cheryl Sheen (x-wife); Joe Smith (x-wife's new partner)

Billing Address Same As Client Address? Yes - OR - **Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)**

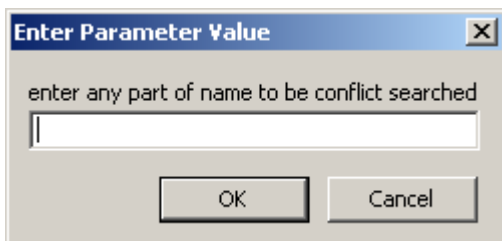
Spare1 (text - 50 char) **Spare2 (text - 150 char)** **Spare3 (text - 250 char)** **Last Updated** 12-Mar-2006 **Updated By** Dough, John

Drop-Down List of Existing Clients [Field] NUM [Field]

A conflict search can be run from the **SEARCHES Menu** (which is accessed from the DocketEase **Main Menu**). On the **SEARCHES Menu**, click the **Conflict Search** button.



You will then be prompted for a string (series) of characters to be searched. Enter any part of the name to be conflict searched and then click the **OK** button or click the **Cancel** button to cancel the search request. It is not necessary to enter the person's full name, but keep in mind the more characters that are entered, the more the chance of getting a clear specific search report. Entering less characters will produce a report containing all files matching the entered characters anywhere in the three search fields. If there are no files with names matching the string of characters entered a blank report will be produced.



The resulting conflict report can be printed by clicking the **Print** button on the Toolbar, or can be exported to MS Word or MS Excel for editing or saving, by clicking either the **Export to Word** or the **Export to Excel** button on the Toolbar.

Subsequent conflict searches can be requested by clicking the **New Search** button.



CUSTOM SEARCHES

There are a limited number of searches built into DocketEase, they are:

Client Searches

Find a client (and all that client's files) by entering either a string of characters which exists somewhere in the Client Name field, but which are not necessarily the first letters of the client's name, or by the Client Number. This may be faster than searching through the 'Existing Clients' list on the **Add/Edit (or View) Client and File Information** form once there are a large number of clients.

File Searches

Find a particular file by entering either a string of characters that exists somewhere in the File Description field, or by the File Number. This is handy when you know the file number, but not the client's name.

Conflict Search

Search through all 'Client Name', 'File Description' and 'Other People On File (re conflict)' fields for a particular string of characters, see [RUNNING A CONFLICT SEARCH](#) for more information in this regard.

Invoice/Payment Information by Client Search

Locate all invoice and payment information for a particular client by entering a string of characters which exists somewhere in the Client Name field, but which are not necessarily the first letters of the client's name. This may be faster than searching through the 'Existing Clients' list on either the **Add/Edit (or View) Client and File Information** or the **Client Account/Payment Information** forms.

Unbilled Dockets by Client Search

Locate all unbilled dockets for a particular client (on all of that client's files) by entering a string of characters which exists somewhere in the Client Name field, but which are not necessarily the first letters of the client's name. This may be faster than searching through the 'Existing Clients' list on either the **Add/Edit (or View) Client and File Information** or the **Add/Edit (or View) Dockets** forms. This is particularly handy when you wish to see a list of ALL dockets for a particular client without having to check each of the client's files individually.

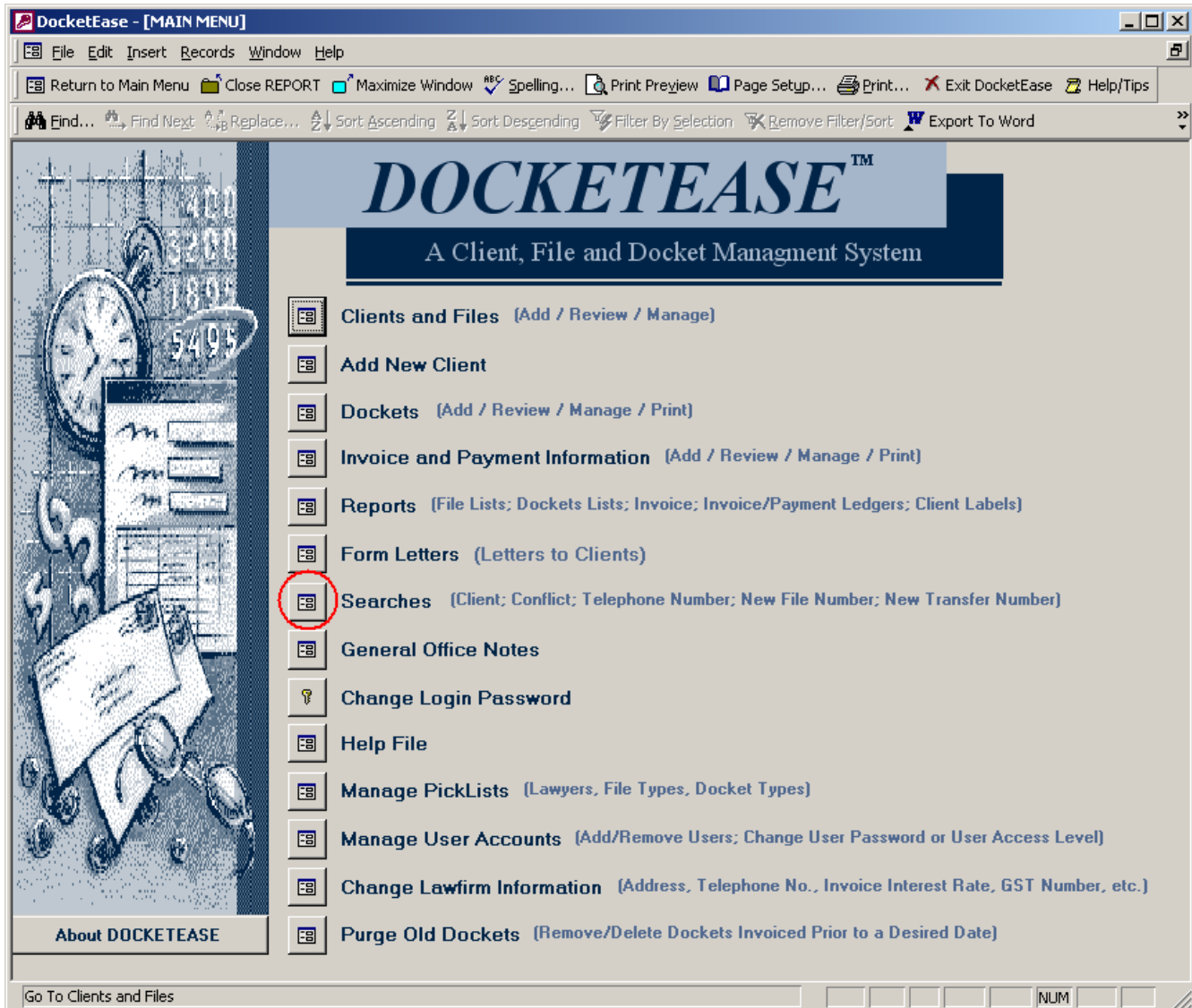
Unbilled Dockets by Lawyer Search

Locate all unbilled dockets for a particular lawyer by entering the lawyer's initials. This is particularly handy when trying to determine which files should be invoiced.

Telephone Number Search

Locate the client belonging to a particular telephone number (where the telephone number is in either the Telephone Number or Fax Number fields) by entering any part of the telephone number. This is particularly handy when trying to reconcile (and docket) long distance charges.

To access these built-in searches, click the Searches button on the **DocketEase Main Menu**.



Then click the appropriate Search button on the **SEARCHES** form and enter the prompted for search criteria (i.e. a string of characters or file number).



The **Search Results** form will appear on the appropriate format, showing all of the records matching the search criteria.

Note: In the case of entering a string of characters, keep in mind that the more characters that are entered, the more the chance of getting only information desired. If there are more than one item/record (client, file, etc.) with the characters entered, the resulting report will contain all items matching the entered characters. If there are no items matching the string of characters entered a blank report will be produced.

A navigation bar will appear at the bottom of the **Search Results** form, which indicates the total number of records located which match the search criteria. To move from one item/record (i.e. client or file) to the next, click the Forward/Back arrows in the navigation bar (at the bottom of the form).

DocketEase - [File Information]

File Edit Insert Records Window Help

Return to Main Menu Close REPORT Maximize Window Spelling... Print Preview Page Setup... Print... Exit DocketEase Help/Tips

Find... Find Next Replace... Sort Ascending Sort Descending Filter By Selection Remove Filter/Sort Filter Excluding Selection Export To Word

Return To Main Menu Return To Searches Prepare Dockets Report (this Client) Prepare Ledger (this Client) Add/Edit Invoices/Payments (this Client)

FILE SEARCH RESULTS

Client Name:

Add/Edit Dockets (this File) Prepare Dockets Report (this File) Prepare Ledger (this File) Prepare Invoice (this File) Prepare Form Letter (this File)

File No.	File Description	Client Ref.	File Type	Resp. Lawyer	Date Opened
1002	Purchase of property at Lot 1, Conc. 10, RR1 Dunrobin (for busir		Real Estate	John R. Dough	23-Aug-2005
<input type="checkbox"/>	<input type="checkbox"/>	Transfer #	Moved Off Site	Date Moved	Off Site Facility
Other People On File (re conflict) Robert (Bob) Franklin (brother and business partner)			Notes (re File) Feeney, Jeremy Commercially zoned property - intends to build for business (Franklin & Assoc.)		
Billing Address Same As Client Address? Yes <input type="checkbox"/>		- OR - Alternate Billing Address (Note - use Ctrl+Enter to put hard return between lines in the address)			
Spare1 (text - 50 char)		Spare2 (text - 150 char)		Spare3 (text - 250 char)	
				Last Updated	Updated By
				10-Feb-2006	Dough, John

The number of files matching your request are shown below.
To see a particular file, click the (Forward/Back) arrows.

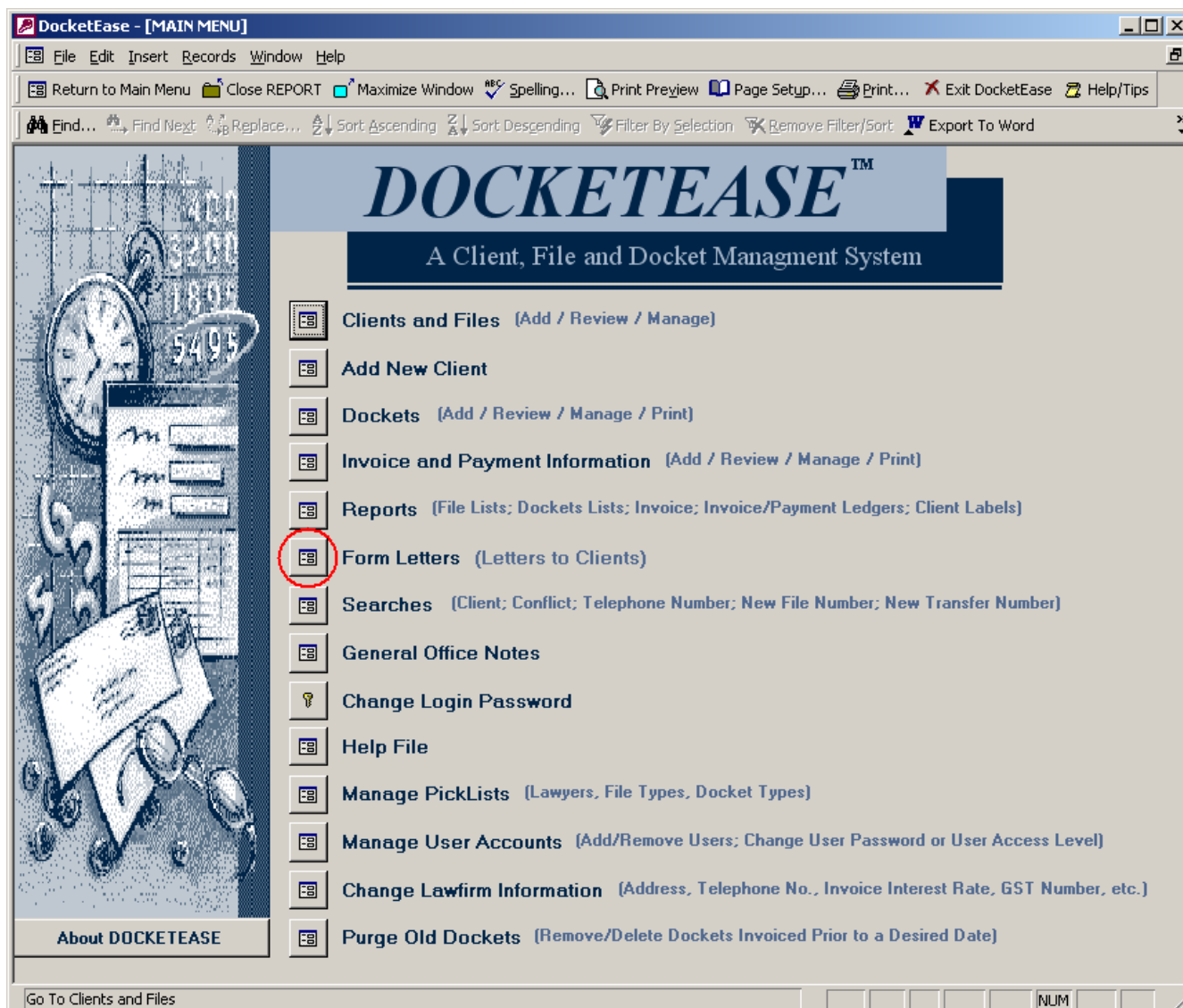
Record: of 5

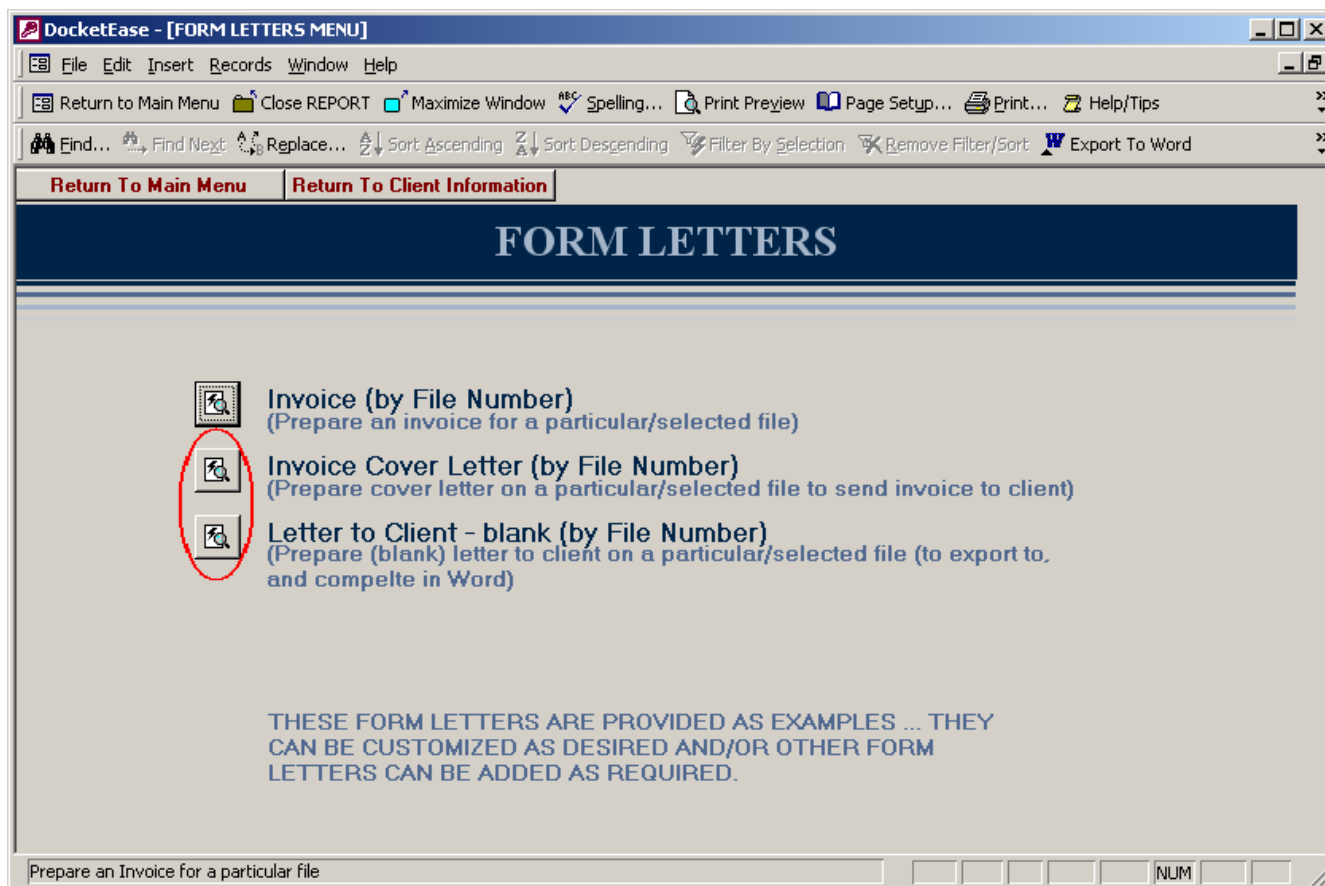
File Number NUM

Information can be edited on the **Search Results** forms by Administrators and Editors as applicable.

FORM LETTERS

DocketEase is capable of producing form letters for a particular file. There are only two form letters available in DocketEase as delivered, however, other form letters can be added as required. To access the available form letters, click the **Form Letters** button on the ***DocketEase Main Menu***, and then click the appropriate form letter button.





Invoice Cover Letter

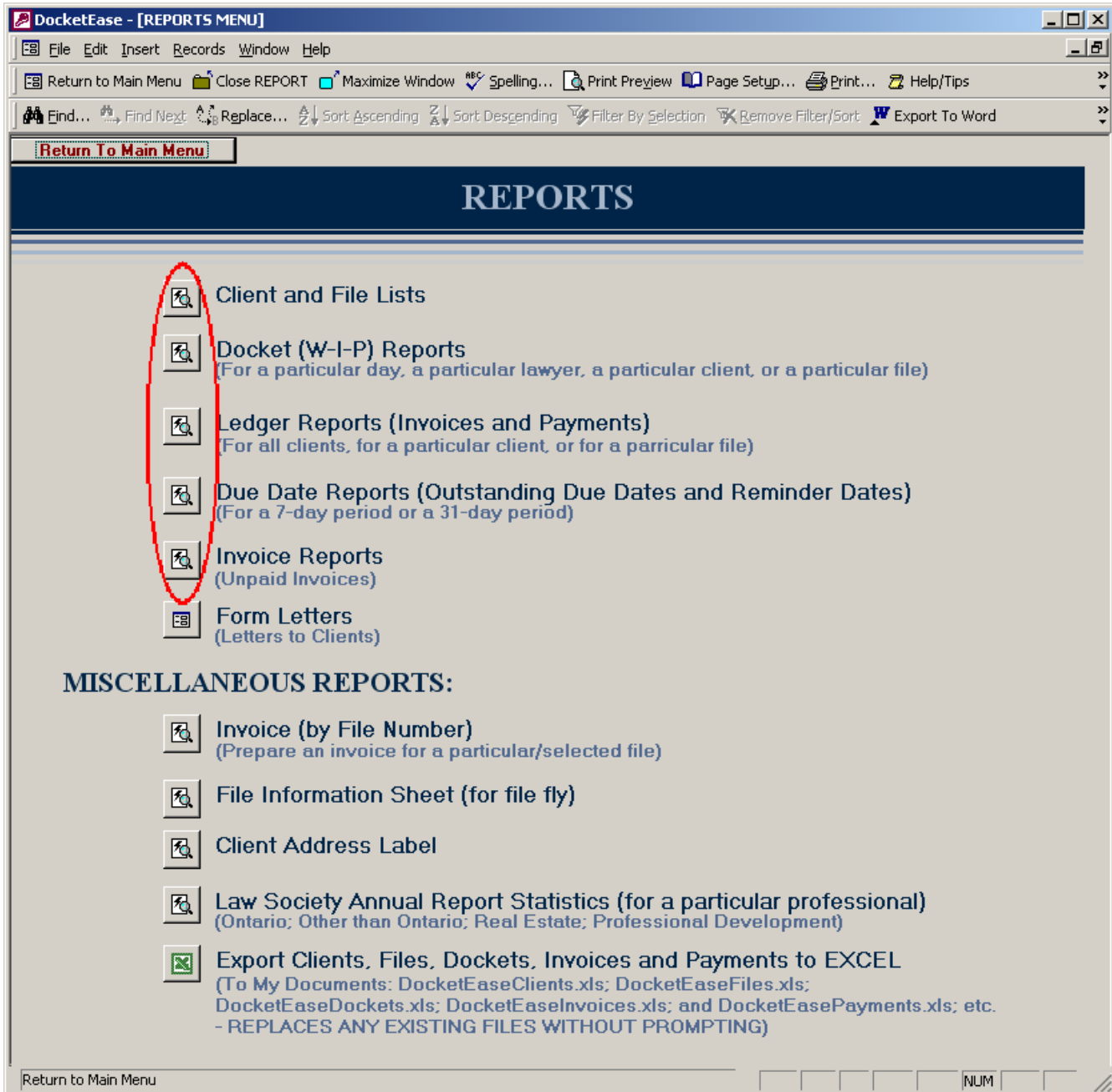
Prepare a cover letter to forward an invoice to a client on a particular file by entering the desired file number.

Blank Letter to Client

Prepare a letter to a client on a particular file in which the body of the letter is blank, but the client address, salutation, re line and signature block are entered. This blank letter can then quickly be exported to Word for completion and saving.

REPORTS

There are a number of predefined reports in DocketEase. These reports are available from the **REPORTS Menu**, accessible from the *DocketEase Main Menu*, by clicking the appropriate report button.



Client and File Lists

Various client and file list formats are available from the **REPORTS – Client and File Lists Menu**:

- a Client/File List – all files (open, closed and moved off-site) in alphabetical order by client;
- a File List – all files (open, closed and moved off-site) in chronological order by file number;
- an Open File List – open files only in chronological order by file number;
- a Closed File List – closed files only (both on- and off-site), in chronological order by transfer number; and
- an Off-site File List – files which have been moved off-site only (in order by date moved off-site).

A custom file list can also be created by clicking the **Create Custom Client/File Report** button on the **REPORTS – Client and File Lists Menu** and then using **Filter**, to limit the report to particular items, and/or **Sort**, to reorganize the list alphabetically/chronologically by a particular field (see [FILTERING INFORMATION IN A FORM](#) and/or [SORTING INFORMATION IN A FORM](#) for more information in this regard). Once the list has been filtered and/or sorted as desired it can then be printed by clicking the **Print** button on the Toolbar, or exported to Word or Excel for further editing and/or saving (see [Exporting Reports to Word or Excel](#) for more information in this regard).

Due Date Reports

Outstanding due date and reminder date reports are available from the **REPORTS – Due Dates Menu**:

- All outstanding due dates
- Today's due dates
- Due dates on a particular file
- Due dates and reminder dates within 7 days of requested date
- Due dates and reminder dates within 14 days of requested date

A custom due date list can also be created by clicking the **Create Custom Due Date Report** button on the **REPORTS – Due Dates Menu** and then using **Filter**, to limit the report to particular items, and/or **Sort**, to reorganize the list alphabetically/chronologically by a particular field (see [FILTERING INFORMATION IN A FORM](#) and/or [SORTING INFORMATION IN A FORM](#) for more information in this regard). Once the list has been filtered and/or sorted as desired it can then be printed by clicking the **Print** button on the Toolbar, or exported to Word or Excel for further editing and/or saving (see [Exporting Reports to Word or Excel](#) for more information in this regard).

Docket Lists

Various docket lists available from the **REPORTS – Dockets (W-I-P) Menu**:

- an All Dockets list (whether outstanding/unbilled or already invoiced/billed) entered on a particular day
- an Outstanding (unbilled) dockets for a particular Client
- an Outstanding (unbilled) dockets for a particular Lawyer
- all Outstanding (unbilled) dockets

File Invoice

An invoice can be prepared directly from the **REPORTS – Invoice and Payment Ledgers Menu** if the file number for the desired invoice is known. See [PREPARING AN INVOICE](#) for further information in this regard.

Invoice & Payment Ledgers

Various client and file ledgers are available from the **REPORTS – Invoice and Payment Ledgers Menu**:

- an All Clients Ledger showing all invoices rendered to and payments made by all clients, showing total invoices, total payments and balance owing for each file.
- a Client Ledger showing all invoices rendered to and payments made by a particular client, showing total invoices, total payments and balance owing for each file.
- a File Ledger showing all invoices rendered on and payments made towards a particular file, showing total invoices, total payments and balance owing for the file.

Outstanding Invoices Report

An Outstanding Invoices Report is available from the **REPORTS - Invoices Menu**. This report shows invoices that are outstanding 30+, 60+, 90+ and 120+ days as of the date of the report. In order for this report to be accurate, it is important that invoices are marked 'paid' when payment is received (by entering a check-mark in the Paid check-mark box/field) so that paid invoices will not appear on Outstanding Invoice reports (see [ENTERING INVOICE AND PAYMENT INFORMATION](#) for more information in this regard.)

Invoices Rendered Report

An Invoices Rendered Report is available from the **REPORTS - Invoices Menu**. This report shows all invoices rendered between two specified (prompted for) dates. This report is useful in determining income, GST and PST calculations for a given period.

Client/File Information Sheet (for file fly)

A file information sheet can be produced for a file fly from the **REPORTS Menu**.

Client Address Label

A client address label can be produced from the **REPORTS Menu**. The address information can then be exported to Word using the **Export to Word** button on the Toolbar, where it can be copied and pasted into another format as desired.

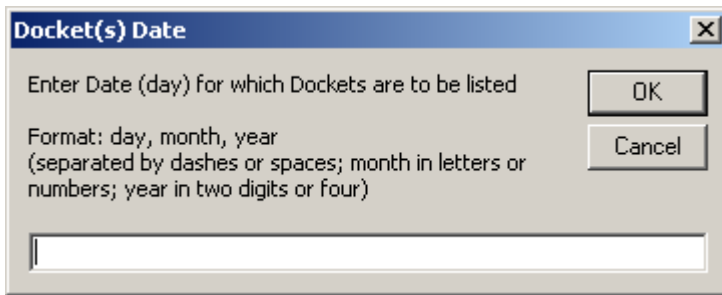
Annual Statistics Report

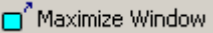
An annual statistics report can be produced from the **REPORTS Menu**. The information provided in this report is helpful in completing the Law Society Annual Report. It sets out total time and percentage of time spent on each 'area of law' in Ontario; in 'other than Ontario'; in Real Estate; and on Professional Development. If this type of report is to be accurately generated, it is important that non-billable (professional development) time dockets be entered and that dockets not be purged for any given year until **after** this report is run. The resulting statistics report can then be exported to Word using the **Export to Word** button on the Toolbar for editing or saving as desired.

Note: Additional reports can be created as required. Contact DocketEase Technical Support for more information in this regard.

Viewing and Printing Built-in Reports

The production of certain reports will require the input of information by the user. In this case, when the report button is clicked, you will be prompted for the required information (i.e. client name, file number, date, etc.). If a particular format is required for the information entered, an example will appear on the prompt/input window.

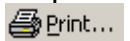


Sometimes the requested report will appear in a smaller window within the PAMS window such that it will not be 'maximized'. In this case, click the **Maximize Window** button on the Toolbar to restore the report window to the 'maximized' size. 

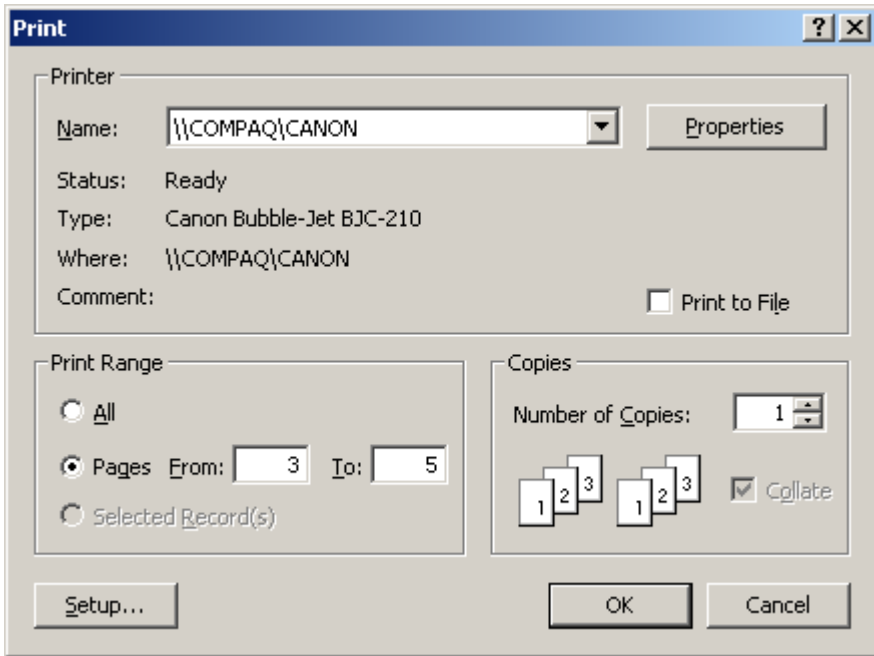
Some reports are created to use landscaped paper or smaller than normal margins. However, sometimes the report will not be automatically formatted to these settings upon production. In this case (when a report does not appear on the screen in the correct format), use the **Page Setup** button to change the paper size, orientation and margins as required.


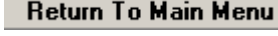


To print a report in its entirety, click the **Print** button on the Toolbar when the report is open






To print only selected pages of a report, click *File* on the Menu Bar; then click *Print* on the drop-down menu; then enter the desired pages to be printed; and then click the **OK** button.



To close a report, click the **Close Report** button  **Close REPORT** on the Toolbar. The previous Report menu will then reappear, from which the **Return to Main Menu** button  **Return To Main Menu** can be used to return to the **Main Menu** if desired.

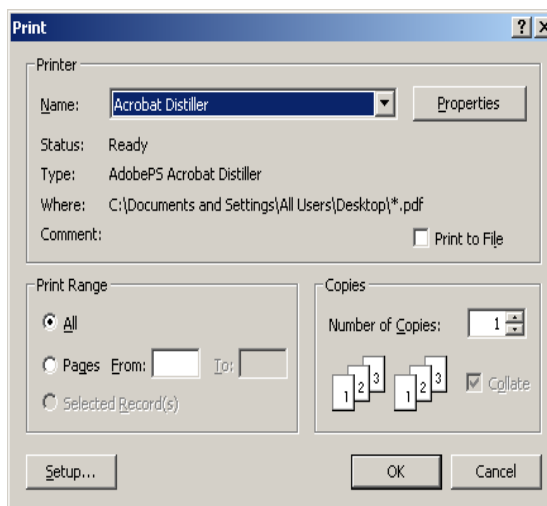
Exporting Reports to Word or Excel

Reports can be exported to Word or Excel for editing by clicking the **Export to Excel**  **Export to Excel** or **Export to Word**  **Export To Word** buttons on the Toolbar. When working with an exported document in Word, it is recommended that Paragraph markers be 'shown' because there are often many surplus tabs when an Access report has been exported to Word, which may make editing the report somewhat cumbersome/dangerous. To turn Paragraph markers on, click the **Paragraph marker show/hide** button on the Word Toolbar. 

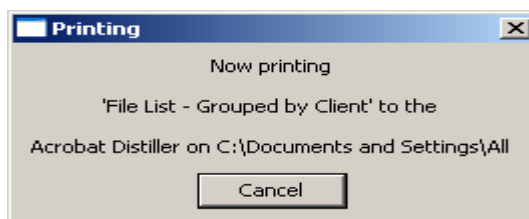
Exporting Reports to Acrobat Reader Format

If it is desired to send a report (in a non-editable format), the report can be exported to Adobe Acrobat format. This feature is, however, **only** available on computers where the Adobe Acrobat Distiller is installed.

- Open the report to be converted (printed)
- Click *File* on the Menu Bar
- Click *Print* on the drop-down list
- Change the printer Name to Acrobat Distiller
- Click the **OK** button (The file will be converted to *.pdf format.)

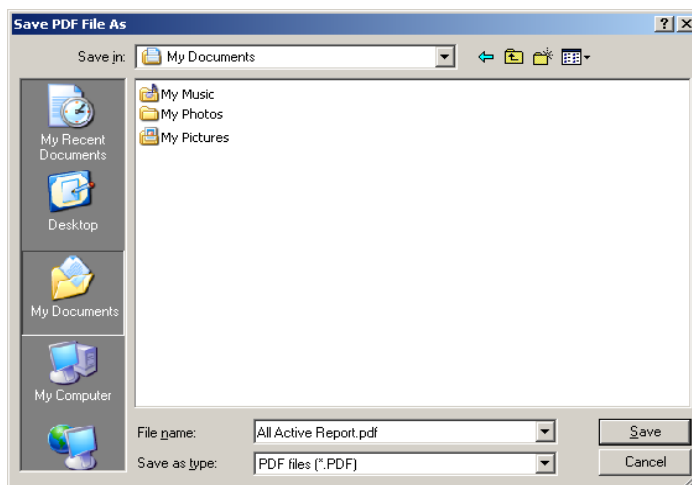


A Printing message will appear briefly, then the Save PDF File As window will open in front of the Printing message.



In the 'Save PDF File As' window:

- Choose a Save In location
- Enter an appropriate File Name for the new Acrobat file
- Click the **Save** button.





EXPORTING ALL TABLES TO EXCEL

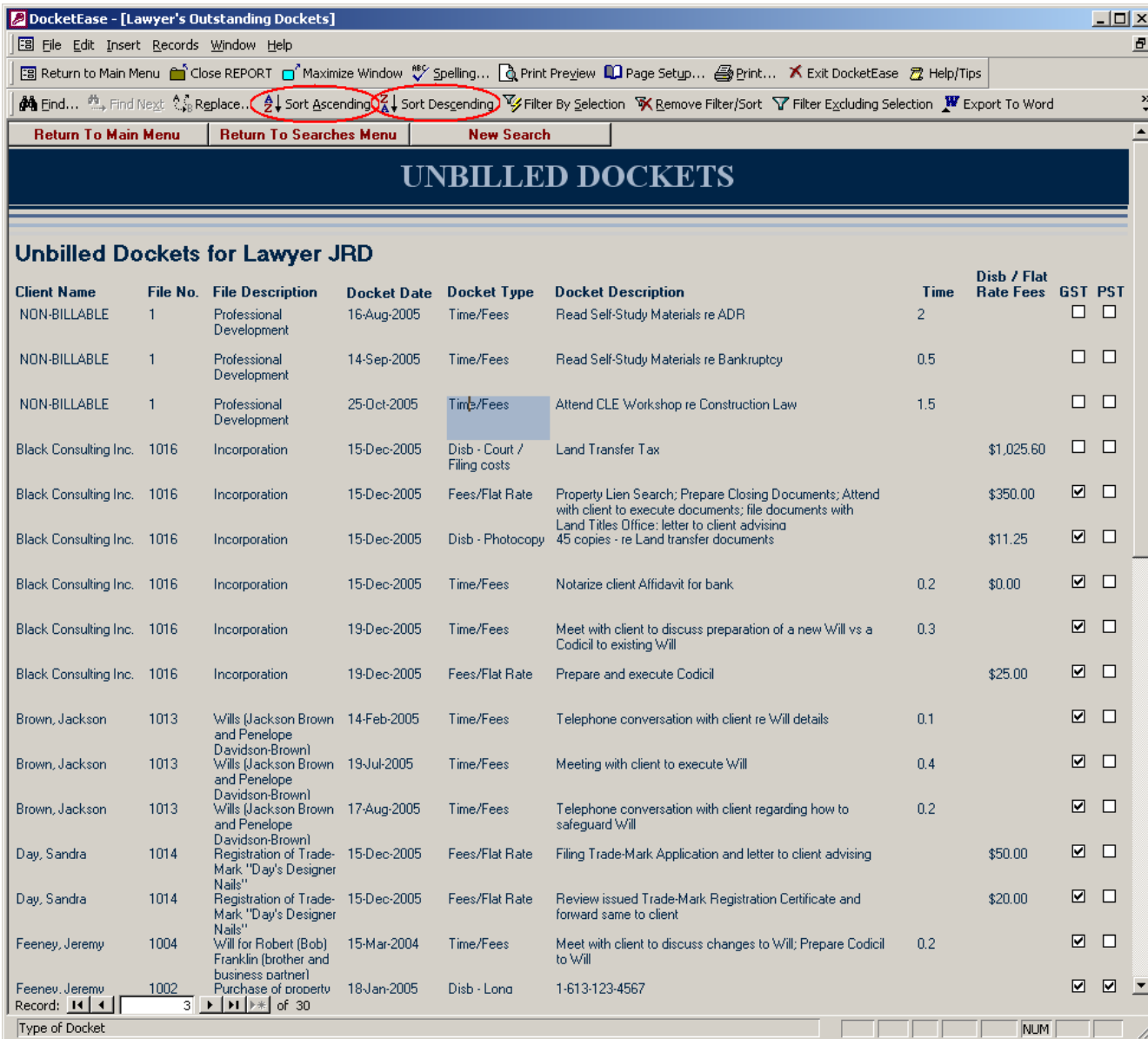
At the click of a button, all DocketEase data (Clients, Files, Due Dates, Dockets, Invoices, Payments, etc.) can be exported to Excel spreadsheets. This is handy for producing custom reports such as a report showing all GST collected on invoices during a particular period. To export all DocketEase data to Excel spreadsheets, click the **Export Clients, Files, Dockets, Invoices and Payments to Excel** button on the **REPORTS Menu**. All data will be exported and saved in My Documents with filenames starting with 'DocketEase'. Any previously existing 'DocketEase...' files (created by having previously clicked the **Export...** button) will be replaced **WITHOUT** prompting. For further assistance in this regard contact DocketEase technical support.



SORTING INFORMATION IN A FORM

The Priority Area Name, Objective Description, Strategy Description and Activity Description are text fields (allowing only up to 250 characters) so that they **can** be 'sorted' in the various form views. However, the Activity Comment field is a Memo field, to allow for lengthy input, and therefore it **cannot** be 'sorted'.

To sort a form by a particular field (alphabetically for text fields, chronologically for date fields, or numerically for numeric fields), click in the desired field (i.e. Activity Description, Status, Team, Date Started, etc.) and click one of the sort buttons on the Toolbar (i.e. Sort Ascending  or Sort Descending .)



UNBILLED DOCKETS

Unbilled Dockets for Lawyer JRD

Client Name	File No.	File Description	Docket Date	Docket Type	Docket Description	Time	Disb / Flat Rate Fees	GST	PST
NON-BILLABLE	1	Professional Development	16-Aug-2005	Time/Fees	Read Self-Study Materials re ADR	2		<input type="checkbox"/>	<input type="checkbox"/>
NON-BILLABLE	1	Professional Development	14-Sep-2005	Time/Fees	Read Self-Study Materials re Bankruptcy	0.5		<input type="checkbox"/>	<input type="checkbox"/>
NON-BILLABLE	1	Professional Development	25-Oct-2005	Time/Fees	Attend CLE Workshop re Construction Law	1.5		<input type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	15-Dec-2005	Disb - Court / Filing costs	Land Transfer Tax		\$1,025.60	<input type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	15-Dec-2005	Fees/Flat Rate	Property Lien Search; Prepare Closing Documents; Attend with client to execute documents; file documents with Land Titles Office; letter to client advising		\$350.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	15-Dec-2005	Disb - Photocopy	45 copies - re Land transfer documents		\$11.25	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	15-Dec-2005	Time/Fees	Notarize client Affidavit for bank	0.2	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	19-Dec-2005	Time/Fees	Meet with client to discuss preparation of a new Will vs a Codicil to existing Will	0.3		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	19-Dec-2005	Fees/Flat Rate	Prepare and execute Codicil		\$25.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brown, Jackson	1013	Wills (Jackson Brown and Penelope Davidson-Brown)	14-Feb-2005	Time/Fees	Telephone conversation with client re Will details	0.1		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brown, Jackson	1013	Wills (Jackson Brown and Penelope Davidson-Brown)	19-Jul-2005	Time/Fees	Meeting with client to execute Will	0.4		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brown, Jackson	1013	Wills (Jackson Brown and Penelope Davidson-Brown)	17-Aug-2005	Time/Fees	Telephone conversation with client regarding how to safeguard will	0.2		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Day, Sandra	1014	Registration of Trade-Mark "Day's Designer Nails"	15-Dec-2005	Fees/Flat Rate	Filing Trade-Mark Application and letter to client advising		\$50.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Day, Sandra	1014	Registration of Trade-Mark "Day's Designer Nails"	15-Dec-2005	Fees/Flat Rate	Review issued Trade-Mark Registration Certificate and forward same to client		\$20.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Feeney, Jeremy	1004	Will for Robert (Bob) Franklin (brother and business partner)	15-Mar-2004	Time/Fees	Meet with client to discuss changes to Will; Prepare Codicil to Will	0.2		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Feeney, Jeremy	1002	Purchase of property	18-Jan-2005	Disb - Long	1-613-123-4567			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Record: 14 | 3 | of 30

Type of Docket: NUM

FILTERING INFORMATION IN A FORM

If a list appears on the screen (i.e. in a Docket Search by Lawyer or a Conflict Search) which is very long and is obviously showing items which are irrelevant, the list can be filtered to either include only items containing particular (selected) information in a particular field, or to remove items containing the particular (selected) information.

To filter a list (to include or remove) by matching information in a particular field, first select (click in) a field containing the 'to be matched' information¹. Then click either the **Filter By Selection** button on the Toolbar² (to remove items not matching the selected item) or the **Filter Excluding Selection** button on the Toolbar³ (to remove items matching the selected item). To remove the filtering and return the list to its original (full) state, click the **Remove Filter/Sort** button on the Toolbar⁴.


UNBILLED DOCKETS

Unbilled Dockets for Lawyer JRD

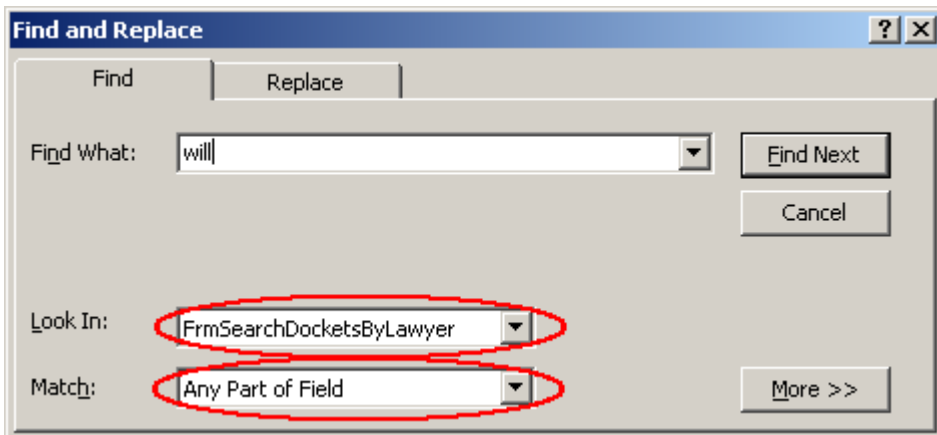
Client Name	File No.	File Description	Docket Date	Docket Type	Docket Description	Time	Disb / Flat Rate Fees	GST	PST
NON-BILLABLE	1	Professional Development	16-Aug-2005	Time/Fees	Read Self-Study Materials re ADR	2		<input type="checkbox"/>	<input type="checkbox"/>
NON-BILLABLE	1	Professional Development	14-Sep-2005	Time/Fees	Read Self-Study Materials re Bankruptcy	0.5		<input type="checkbox"/>	<input type="checkbox"/>
NON-BILLABLE	1	Professional Development	25-Oct-2005	Time/Fees (1)	Attend CLE Workshop re Construction Law	1.5		<input type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	15-Dec-2005	Disb - Court / Filing costs	Land Transfer Tax		\$1,025.60	<input type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	15-Dec-2005	Fees/Flat Rate	Property Lien Search; Prepare Closing Documents; Attend with client to execute documents; file documents with Land Titles Office; letter to client advising		\$350.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	15-Dec-2005	Disb - Photocopy	45 copies - re Land transfer documents		\$11.25	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	15-Dec-2005	Time/Fees	Notarize client Affidavit for bank	0.2	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	19-Dec-2005	Time/Fees	Meet with client to discuss preparation of a new Will vs a Codicil to existing Will	0.3		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Black Consulting Inc.	1016	Incorporation	19-Dec-2005	Fees/Flat Rate	Prepare and execute Codicil		\$25.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brown, Jackson	1013	Wills (Jackson Brown and Penelope Davidson-Brown)	14-Feb-2005	Time/Fees	Telephone conversation with client re Will details	0.1		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brown, Jackson	1013	Wills (Jackson Brown and Penelope Davidson-Brown)	19-Jul-2005	Time/Fees	Meeting with client to execute Will	0.4		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brown, Jackson	1013	Wills (Jackson Brown and Penelope Davidson-Brown)	17-Aug-2005	Time/Fees	Telephone conversation with client regarding how to safeguard Will	0.2		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Day, Sandra	1014	Registration of Trade-Mark "Day's Designer Nails"	15-Dec-2005	Fees/Flat Rate	Filing Trade-Mark Application and letter to client advising		\$50.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Day, Sandra	1014	Registration of Trade-Mark "Day's Designer Nails"	15-Dec-2005	Fees/Flat Rate	Review issued Trade-Mark Registration Certificate and forward same to client		\$20.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Feeney, Jeremy	1004	Will for Robert (Bob) Franklin (brother and business partner)	15-Mar-2004	Time/Fees	Meet with client to discuss changes to Will; Prepare Codicil to Will	0.2		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Feenev, Jeremy	1002	Purchase of property	18-Jan-2005	Disb - Long	1-613-123-4567			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Record: 14 of 30

SEARCHING THROUGH A FORM

The Search button on the Toolbar  Find... can be used to search for particular word(s) in any form view. When doing a search, be sure to:

- Change the 'Look In' box to the name of the form, rather than the name of a particular field; and
- Change the 'Match' box to 'Any part of field', rather than 'Whole Field' (in order to find the word(s) wherever they may occur on the form).
- Click the Find Next button



Notes:

1. Upon clicking the Find Next button, the searched text will become highlighted. If there does not appear to be any text highlighted on the form, the highlighted may be covered by the 'Find and Replace' window. In this case, move the Find and Replace window to a place on the screen where text will not be obstructed (by clicking on the Title Bar at the top of the window and dragging it to desired location.)
2. This Search feature is not available in Reports

MANAGING PICK-LISTS

A pick-list is a drop-down list of possible values for a given field. A pick-list is provided when the value for the field is to be limited to particular items. A pick-list helps to ensure that the value entered in a field is correct. If a desired item does not appear in a picklist it can always be added.

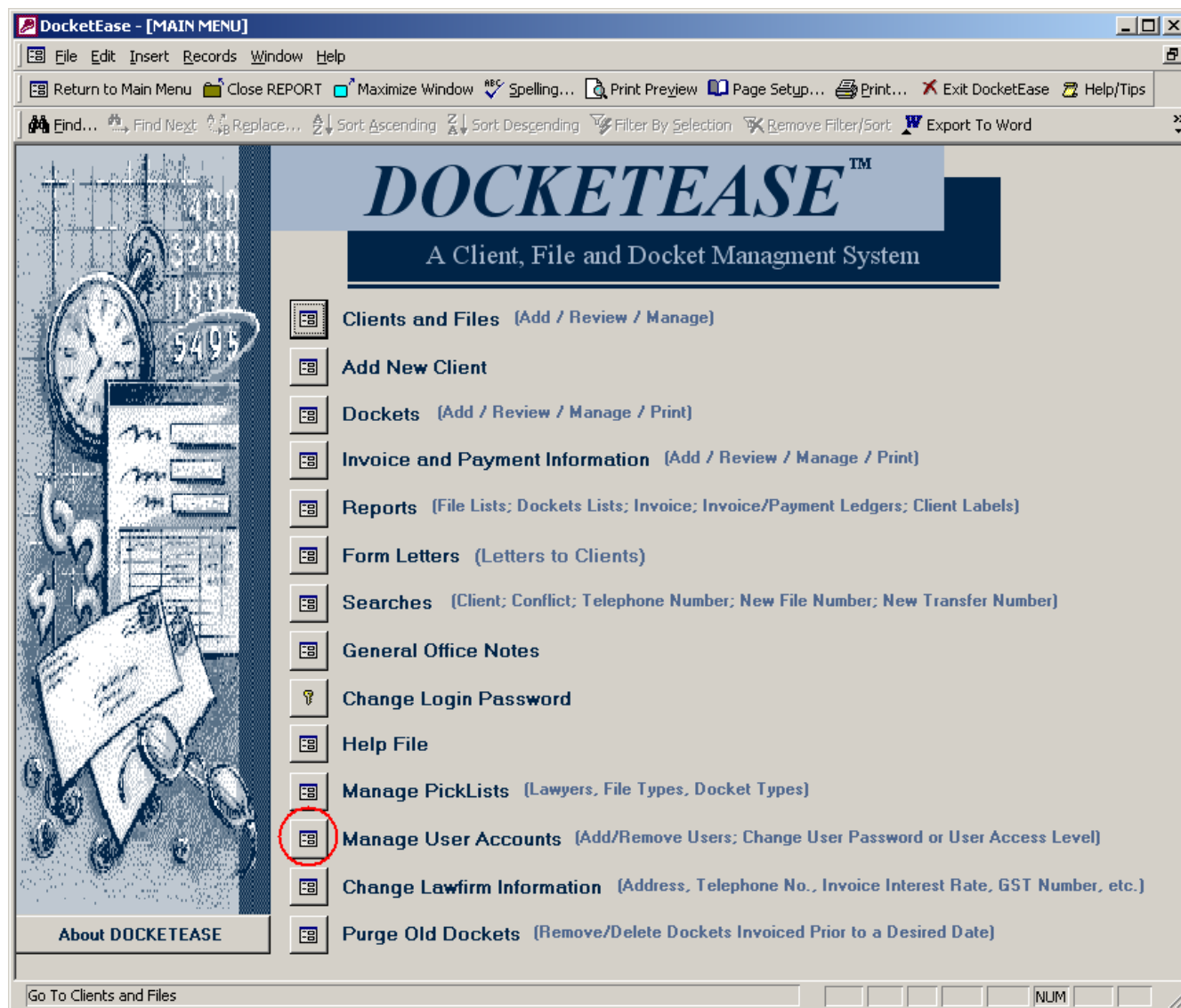
MANAGING USER ACCOUNTS

In order to access/use DocketEase, a userID and password are required. There are three user access levels built into DocketEase, they are:

- Administrator: Can access/edit everything (users/passwords, picklists, and data);
- Editor: Can create new entries (clients, files, dockets, etc.), and can view and edit existing entries; and
- Viewer: can view all entries, but cannot edit anything.

Users can only be added, removed, or changed by the DocketEase Administrator.

To add, change or remove a DocketEase user, click the **Manage User Accounts** button on the **DocketEase Main Menu**.



The **MANAGE USERS** form will open to show a list of all of the current DocketEase users.

The following information is required for each DocketEase user:

- User Login ID – used to log in to DocketEase
- Password – used to log in to DocketEase;
- User Access Level – used to determine/limit the extent of the user's access once logged in to DocketEase; and
- User's Name – used to track changes made to DocketEase in the various 'Updated By' fields).

To change existing user information, simply click in the applicable field and edit the information. Keep in mind that:

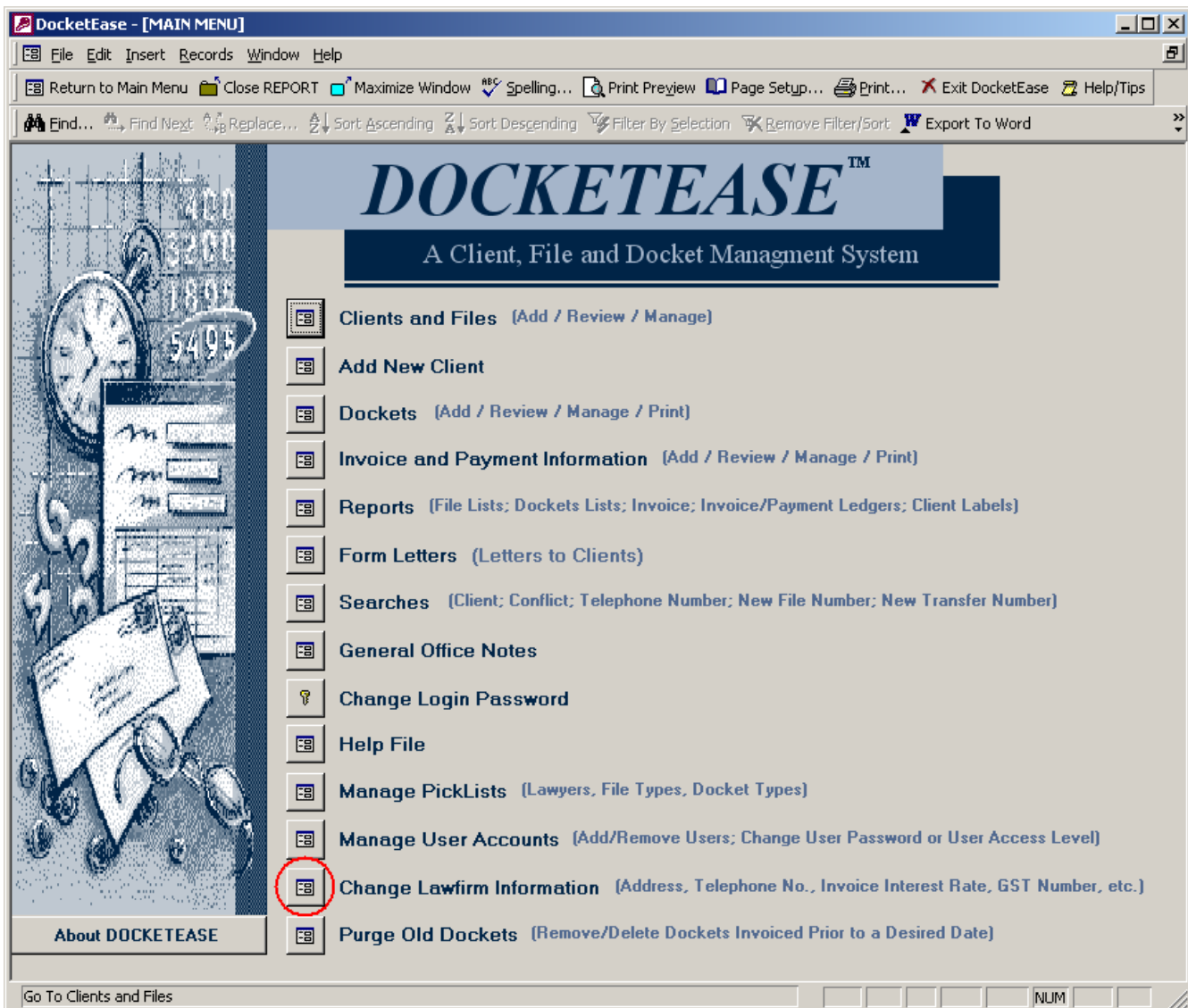
- No two Login ID's can be the same;
- The User Access Level field is a pick-list field, therefore, click the down-arrow and select an access level from the list
- The 'password' is not really a 'word', but rather a string of numbers that represents the 'word'. It is, therefore, recommended that when setting/resetting passwords they be set to '-24145', which is the keycode for 'welcome' and then the user can log in using the password 'welcome' and change his/her password to a preferred/private word.

Other password keycode examples are available, in the event that you prefer not to use 'welcome', by clicking the **Show Other KeyCode Examples** button.

CHANGING LAWFIRM INFORMATION

DocketEase will be delivered/installed without Lawfirm information having been entered. This Lawfirm information (Lawfirm name and address, GST number, staff hourly rate, invoice interest rate, PST rate and GST rate) is used in the generation of invoices. This Lawfirm information should, therefore, be changed before generating any invoices for the first time or whenever the said information changes. The Lawfirm information can only be changed by an Administrator.

To change any Lawfirm information, click the **Change Lawfirm Information** button on the **DocketEase Main Menu**.



The current Lawfirm information will show in the left-hand column of the **Change Lawfirm Information** form. To change a particular information item, click in its corresponding space in the right-hand column and enter the new (correct) information, either then tab or click into another field to cause the change to be made. The new (correct) information will then show in the left-hand column of the **Change Lawfirm Information** form.

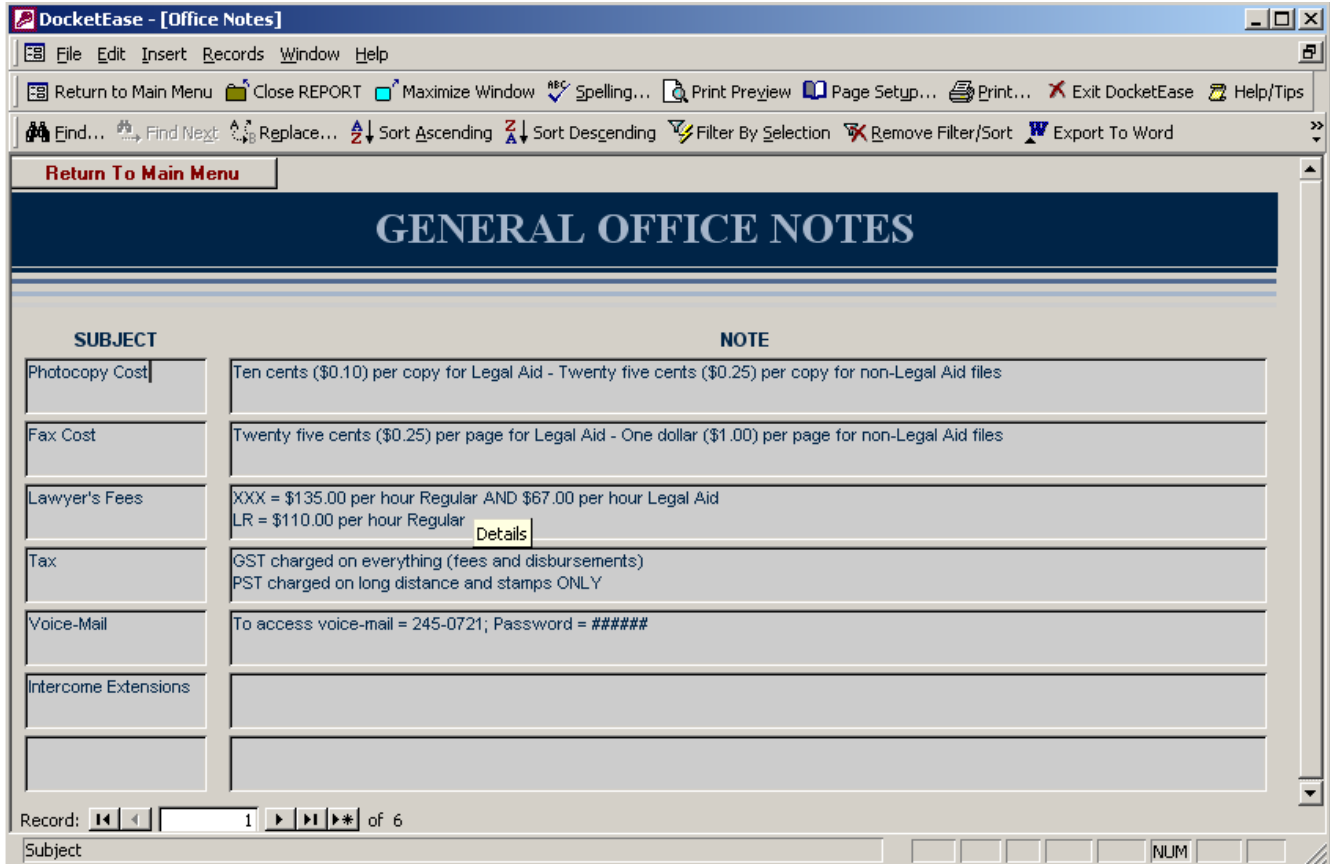
Current Information	New Information
Lawfirm Name	Your Firm Name
Address Line 1	Your Firm's Street Address
Address Line 2	Your Firm's City, Province
Address Line 3	Your Firm's Postal Code
Address Line 4	Your Firm's Telephone Number and Fax Number
GST Number	Your GST Number
Staff Hrly Rate	\$0.00
Invoice Interest Rate	3.6
PST Rate	8.0
GST Rate	7.0

Note: To leave a line blank (i.e. an Address Line which is not required), enter something/anything in the corresponding 'New Address Line', then immediately remove it (to leave it blank) ... in the case of a 'New Interest Rate', be sure to enter a number (NOT a letter).

GENERAL OFFICE NOTES

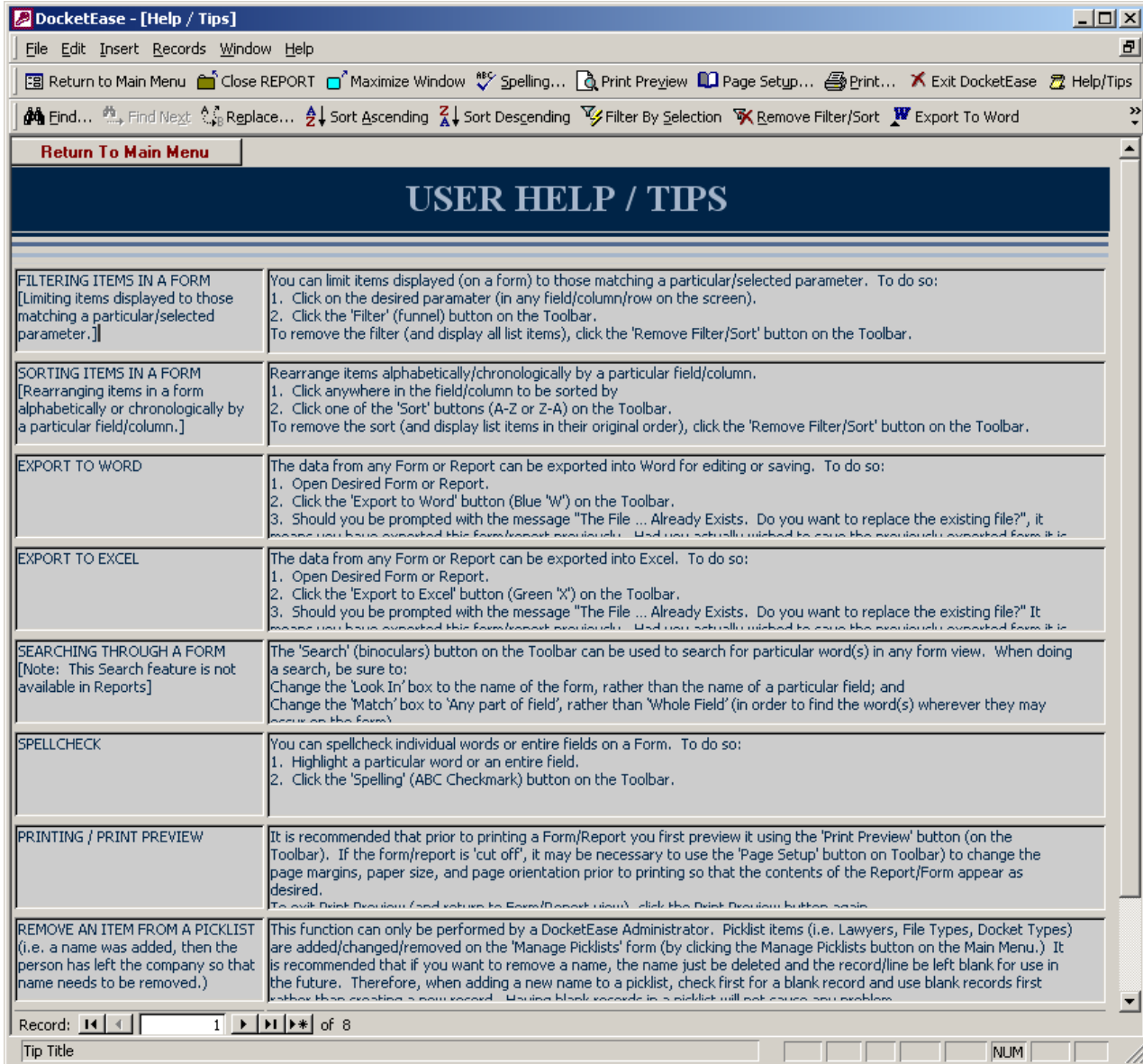
There are likely office notes, practices, procedures (such as photocopy costs, voice-mail password, office intercom numbers, etc.) which all members of the office need to know. Such notes can be stored in DocketEase for easy access. These notes can only be added to or edited only by a DocketEase Administrator, but can be viewed by all DocketEase users.

DocketEase General Office Notes can be accessed by clicking the **General Office Notes** button on the **DocketEase Main Menu**.



DOCKETEASE HELP

Limited DocketEase help notes/tips are available by clicking the **Help File** button on the **DocketEase Main Menu**. These notes can be added to as desired by a DocketEase Administrator, but can be viewed by all DocketEase users.



REMOVING UNREQUIRED (OLD) DOCKETEASE FILES FROM 'MY DOCUMENTS'

When DocketEase forms, reports or data (tables) are exported to Word or Excel (by clicking either the **Export to Word** or **Export to Excel** button on the Toolbar or the **'Export Clients, Files, Dockets, ...'** button on the **REPORTS Menu**), files are automatically created in 'My Documents'. These files are not required by DocketEase and can be deleted as desired.

GLOSSARY OF TERMS

Button	An item (in a Form) which, when clicked, performs a function, such as opening a subsequent form, running a query, or producing a report.
Database	A collection of information that is related to a particular subject or purpose. Within the file, the data is separated into separate storage containers called Tables. The data in these tables is added to, viewed and updated using forms; is quickly found and retrieved using queries; and easily analyzed or printed in a specific layout using reports.
Field	A 'container' for a single piece of information. Often referred to as a 'cell'.
Form	Forms are used to view and/or update data in the database. Most of the information in a form comes from an underlying source (table). Other information in the form is stored in the form's design.
Maximize	To make a Window completely fill the screen, such that only that one Window is visible.
Menu Bar	The (grey) bar just below the Title Bar (at the top of a Window) on which there appear words (i.e. File, Edit, ... Help) each which, when clicked, produce a menu of available functions.
Mouse wheel	A 'wheel' on a computer mouse, located between the left- and right-click buttons which, when rolled, causes the information on the screen to scroll.
Pick-list	A drop-down list of possible values for a given field. A pick-list is provided when the value for the field is to be limited to particular items. A pick-list helps to ensure that the value that is entered in a field is correct.
Query	A question about the data stored in the tables, or a request to perform an action on the data. A query can bring together data from multiple tables to serve as the information source for a form or report.
Record	A group of Fields relating to a specific database 'item'.
Report	A report is an effective way to present data in a printed format. The creator of a report has control over the size and appearance of a report so the way the information is presented is very flexible. Most of the information in a report comes from an underlying source (table). Other information in the report is stored in the report's design.

Shortcut An icon, generally on the Windows Desktop, which links to a file (item) saved elsewhere on the computer (or network). Shortcuts are distinguishable from the original item by a small black arrow in the lower left corner of the icon. Deleting a Shortcut does not delete the item to which the shortcut points.



Table A collection of data about a specific topic. Using a separate table for each topic means that data is stored only once, which makes the database more efficient and reduces data-entry errors.

Title Bar The (normally blue) bar at the top of any given Window on which it is stated the title (name) of the Window.

Toolbar The (colourful) bar just below the Title Bar on which there appear small pictures which, when clicked, each performs a different function. Often referred to as the 'Button Bar'.