LegalServer 102 – Cases, Timekeeping, Outreach, Calendar, Reports

This document provides an introduction to using several features of LegalServer:

- Cases
- Timekeeping
- Outreach
- Calendar
- Reports
Cases

This section provides an overview of working with cases, including:

✦ Adding notes to a case
✦ Adding time to a case
✦ Adding calendar items to a case
✦ Uploading documents to a case
✦ Generating documents from templates
✦ Case assignments
✦ Case Status and Disposition
✦ Printing case information

As with other aspects of LegalServer, the display of cases and the features available can be customized by each organization, so the screenshots may not match a particular site exactly.

Overview of the Main Profile
The main profile displays information about a case. The primary part of the page is organized into tabs that display fields or lists of information. The sidebar on the left displays a summary of information about a case. The Actions menu provides the links that let you do something with a case – add a timeslip, add a note, upload a document, and so on.
Clicking on one of the tabs on the profile will display additional information. For example, clicking on the Case Time tab in the top row of tabs will display any timeslips linked to the case:

Editable fields are indicated by clickable blue text. “Blocks” of information, such as the client's address fields, may also be editable. Administrators decide which fields are editable depending on the case's disposition. Many fields that can edited while a case is open may not be editable after a case is closed.

**Case Notes**

The main profile is generally designed with a section to display all the notes linked to the case:

There are 3 ways to add notes to a case:

✦ Use the **Add Case Note** link in the Actions menu.

✦ Enter a note while adding a timeslip to a case.

✦ Email a note to a case. (For instructions on how to email a note to a case, go to the top level Help tab in LegalServer and view the “Emailing Notes to Cases” topic).

The Notes section will list all notes for a case, including any notes entered during the application and intake process. Notes will also include “system notes” that are added automatically, for example, when a case is re-opened.
Adding Time to a Case
The Actions menu on the main profile will contain an Add Staff Time link on the Actions tab, and possibly an Add Pro Bono Time link. If the Timer feature is enabled, it can also be used to add time to a case. See the Timekeeping section of this document for more details.

Adding Calendar Items to a Case
The Actions menu will usually contain a Scheduling tab that allows you to create calendar items that are automatically linked to the case. See the Calendar section of this document for more details.

Uploading Documents to a Case
There are 3 ways to upload a document to a case:

✦ Use the Add New Document link on the Actions menu.
✦ Upload a document while adding a Case Note.
✦ Attach a document to an email sent to the case.

The documents uploaded to a case typically appear in a Documents tab of the case:
A link for documents that are uploaded while creating a case note, or emailed to a case as attachments, will also appear in the note:

![Image of document attachment](image1.png)

Although the view is labeled “Documents”, any type of file can be uploaded to a case.

**Generating Documents from Templates**
Administrators can create document templates that generate a document with information from a case inserted into the document. These templates are listed on the Recommended Documents tab, which typically appears below the Documents tab on the main profile. Each time a document is created from a template, a copy is stored in the Generated Documents subfolder of the case.

**Case Assignments**
Every case in LegalServer must be assigned to a person, a program, and an office. Every open case will appear on the home page of the person it is assigned to, and will also appear on the home page of other users assigned to the case.

There can only be one **Primary Assignment** for a case at any time, and that information is usually displayed in the sidebar.

![Image of case assignment](image2.png)
The primary responsibility for a case can be transferred to another person, office, or program using the Assign Case link on the Actions menu.

A case can have other types of other assignments; common ones are Co-counsel and Pro Bono assignments, and have as many of these other assignments as needed. Co-counsel assignments can be made using the Assign Case link. Co-counsel and Pro Bono assignments can be made using the Refer to Probono/Other User link. The “Refer to” link allows you to take advantage of a feature in LegalServer that attempts to match users with cases based on problem code, county, and other factors.

LegalServer maintains a log of all assignments made to a case, and the main profile will usually have a tab that displays the assignment history:

![Assignment Log](image)

**Case Status and Disposition**

Case Status and Disposition may initially seem similar, but are designed to serve different purposes.

![Case Status](image)

**Disposition** is maintained by LegalServer and is not directly editable. Changing the disposition of a matter requires going through a process that each organization defines: an intake process to change a matter's disposition from Incomplete Intake to Open, a closing process to change the disposition to Closed, a rejection process to change it to Rejected Matter, and so on. Organizations configure these processes to require certain information to be collected before the process can be completed and the matter's disposition changed. For example, closing a case might require selecting a valid close reason and entering one or more outcomes.
**Case Status** is designed as a workflow feature, primarily used while a case is pending or open. Organizations control the list of statuses that a case can have. Each time the case status is changed, users can enter notes and email those notes, and LegalServer logs the change into the case status history:

Notes entered when changing the case status appear in the history as well as the case notes section of the main profile.

Case Status appears as a column and filter on the Cases list, providing an easy way to see all cases that have a particular status. For example, a supervising attorney can display all cases that have the status “Supervisor Review Needed”:

Case Status also appears as a column and filter in the Current Assignments list on a user's home page.
Printing Case Information
The main profile is typically configured with a Views menu that contains links for printable pages of information. Each organization can create as many printable pages as needed. Printable pages generally contain a subset of all the information on a case.

Additional Features for Working with Cases
This section has provided an overview of the most frequently used features when working with cases. Additional features may be available depending on a site's configuration. For example, trust and expense information may be collected on cases, forms to collect information for specific grants may be provided, and so on. Links for any additional features will be in the Actions menu on the main profile.
Timekeeping

LegalServer provides an extensive set of features to record and classify time. An organization's administrators can customize the time entry forms and enable different features. This document describes the standard timekeeping features.

The main Timekeeping page displays a user's Timekeeping Log. The log shows information about recent timeslips, and filters to display a different set of timeslips (for a different date range, a different user, and so on). Additional tabs may be displayed and are covered later in this section. Like most lists in LegalServer, the Timekeeping Log can be exported in XLS format using the green X icon in the upper right hand corner of the log.

Types of Time
LegalServer allows recording time linked to cases (Client Time), time that is linked to outreach records (Outreach Time), and time that is not linked to either (Non-Client Time). If an organization enables the feature, pro bono time for each of the these types can be recorded. The Actions menu on the main Timekeeping page displays the options available:
**Entering Time**
A new timeslip can be started using the Actions menu links shown above. There are additional options for recording time on cases and outreaches, as well as the **Timer** feature, which is described below.

**Time on Cases**
The Actions menu on each case has an **Add Staff Time** link on the Actions tab. Using that link will create a timeslip that is automatically linked to the case, and return you to the case. A case note can also be entered on the timeslip form.

As noted above, you can click the **Add Client Time** link on the main Timekeeping page to start a timeslip. A search box is provided on the form to link the timeslip to a specific case.

The main Timekeeping page also has two lists of cases that allow entering time without needing to view a case or search for it. The **Cases** tab lists all of your open cases and provides an **Add Staff Time** link for each case. The **Recently Accessed Cases/Matters** list a list of all the cases and matters you have recently viewed, sorted by most recent first.

**Non-Client Time**
Entering time that is not linked to a case or an outreach can be done using the **Add Non-Client Time** link in the Actions menu on the main Timekeeping page.
Timer
LegalServer provides a Timer feature that, if enabled, appears near the Search menu in the top navigation area. The timer can be started while viewing any page. Clicking the Timer link will display an option to start a timeslip for recently viewed cases, or a timeslip for recently viewed outreaches, or a non-client timeslip. If you are viewing a case or matter, the first option will be to start a timeslip for “This Client”:

Clicking one of these links will start a timer running and display the elapsed time. Putting your mouse cursor over the Timer menu again will show the running timer and links to stop and create a timeslip, pause the timer, or cancel it:

Note that the display of the elapsed time will only update when the page is refreshed, but the actual elapsed time is being maintained by the server. The Timer section will display in the navigation section on every page until it is stopped.

If you need to stop the timer but not record a timeslip, click on either the pause icon or the cancel icon.
Outreach

Outreach records collect information about services an organization provides that are not tied to a specific case or client. This can include presentations, workshops, trainings, projects, or any other type of service.

The top level tab for Outreach information is sometimes renamed to Other Services, Other Matters, Non-Client Matters, or Projects. In addition, organizations can extensively customize outreach records. This document covers the standard outreach records in LegalServer.

The main outreach page initially displays a list of all active outreach records:

Like other lists in LegalServer, the list can be sorted by various columns, and has a set of filters to display a subset of all outreach records in the database. Clicking on either the date or the name of an outreach will open the outreach profile page.

The Actions menu on the main outreach page has a **New Outreach** link to create a new outreach record.

Outreach records can have notes, documents can be uploaded, and time and events linked to them. When viewing an outreach record, the Actions menu contains links for the available actions:
A partial view of an outreach record shows some of the information that can be collected:

<table>
<thead>
<tr>
<th>Outreach</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Outreach Created</td>
<td>11/23/2010</td>
</tr>
<tr>
<td>Outreach Title</td>
<td>Identity Theft</td>
</tr>
<tr>
<td>Active</td>
<td>Yes</td>
</tr>
<tr>
<td>Brief Description</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Outreach Specific Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>OM Type</td>
<td>N/A</td>
</tr>
<tr>
<td>Subject</td>
<td>N/A</td>
</tr>
<tr>
<td>Funding Code</td>
<td>50 Test Code</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Outreach Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Problem Code</td>
<td>09 Other Consumer/Finance</td>
</tr>
<tr>
<td>Location</td>
<td>N/A</td>
</tr>
<tr>
<td>Office</td>
<td>Main Office (MAIN)</td>
</tr>
<tr>
<td>Programs</td>
<td>General</td>
</tr>
<tr>
<td>Staff</td>
<td>IV Ashton, Legalservice Staff</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Matter Reporting, Including Attendees</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Matter Reporting Code</td>
<td>Not a Matter</td>
</tr>
<tr>
<td>Number of Attendees (Actual)</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Multiple staff and pro bono users can be associated with an outreach.
Calendar

The Calendar feature in LegalServer allows you to create and display Tasks, Deadlines, and Events.

**Tasks** are todo items that have a due date. **Deadlines** are tasks, but appear on both your task list and your calendar. **Events** happen on a specific date and time.

The Calendar can display Day, Week, and Month views, as well as an Event List (a tabular view).

Each calendar view has filters to display your deadlines and events, or those for an office or program.

Calendar information is shared throughout an organization by default, however individual events can be marked **Private**. If you view another user’s calendar, any events marked private would display as a block of time with a title, but you could not view details about the event.

Events can also be marked as **Frontdesk**. Larger offices often use this field to indicate when clients or other people are coming to the office. Frontdesk is a filter on the calendar allowing anyone working in a reception area to see these events. The user creating the event does not need to know who might be working in the reception area at the time of the event.

The **Preferences** link at the top right of every page in LegalServer allows each user to set certain calendar preferences such as the start and end time of a day and the default tab (Day/Week/Month/Event List) to display.
The Actions menu on the Calendar page displays links to create new events, tasks, and deadlines:

![Actions menu](image)

Events, tasks, and deadlines can be **assigned to multiple users**, and will appear on the task list or calendar for each assigned user.

Each event, task, and deadline can have a **reminder**. Reminders can be sent by email and/or through the message center in LegalServer.
Linking Calendar Information to Cases
Events, tasks, and deadlines can stand 'on their own', but can also be linked to cases. (Appointment information is often linked to prescreens if an organization uses that feature).

The Actions menu on a standard case profile has a Scheduling category:

Creating an event, task, or deadline from a case will link that item to the case, and display the case number as a clickable link on the calendar or task list:
Syncing Calendar Information
LegalServer can serve each user's calendar events to external applications, allowing a one-way sync from LegalServer to the other application. LegalServer provides the information in standard webcal format, so any application that understands that format can pull information from LegalServer.

Each user's profile page (accessed by clicking your name and the My Profile link at the top right of any page) contains the webcal link to copy into the external application:

The webcal link serves calendar events only. It does not serve tasks, deadlines, or contacts.
Reports

Reports provide a way to display, print, and export information from LegalServer. The Reports page has 5 lists of reports:

- **Base Reports** are created by administrators and users with appropriate permission.
- **Saved Reports** are versions of base reports that can be created by any user.
- **All Reports** combines the Base Reports and Saved Reports lists.
- **Report Tree** is a list of all reports, and can be grouped by administrators.
- **Future Reports** are reports that are in the process of being created based on reports from a prior case management system.

Each user can mark a report as a Favorite by clicking the icon in the last column, then display only favorite reports using Show Filters to filter the list.
**Elements of a Report**

Each report displays with an initial set of columns (fields) and filters, provides a way to change and re-order the columns, and to change the filters that limit the data contained in the report.

In the following example, the Selected Filters section indicates that this report contains information only on cases that have a disposition of pending, open, or closed; it does not contain information on prescreens, incomplete intakes, or rejected matters:

![Cases/Matters Report](image)

Note in the above example that the case ID numbers are blue. That indicates a clickable link that would, in this example, open the associated case. Reports can contain clickable case IDs, timeslips IDs, etc.

If you left click on a link in a report, it will open the case (or timeslip, event, etc.), “replacing” the report page. If you are not finished working with the report, you can right click on a link and open it in a new tab or browser window instead.
**Filter Options**
The filter options section displays all the fields that can be used to filter, or limit, the information returned by the report. For example, the Case Disposition filter in the example above could be changed to show only Open cases.

**Multiple filters** can be applied to a report. A record must meet the criteria of all filters to be returned in a report. A report with the following filters would only return cases that are assigned to the main office and have a close reason of either A or B.

![Selected Options](image)

**Data Options (Columns)**
The data options section of a report displays a list of Available Fields, a list of Display Fields that are currently being shown on the report, and buttons that allow fields to be moved back and forth between the two lists, as well as change the order of the Display Fields.

![Data Options](image)

**Totals and Breakdowns**
A report writer can provide breakdowns and totals at the end of a report that might be useful. In the following example, you can see how many cases have a particular disposition, and the total of the Total Time for Case column.
Totals and breakdowns are for a report as a whole. Although a report might initially only display 1 – 20 of 765 records, the totals and breakdowns will appear at the bottom of that page, but the values will be for all 765 records.

**Run Report**
The Run Report button is used to refresh the data displayed in a report. If the filters on a report are changed, or the display fields are changed, clicking the Run Report button will apply those changes.

The Run Report button is also used if the information in the database is changed. When a report is opened, it contains a snapshot of the information in the database at that moment. For example, you run a report of open cases that initially shows 700 cases, but notice that one of the cases should be closed. You open that case in another tab and close it. Returning to the report, you would click the Run Report button to refresh the data and only display the 699 open cases.

**Save Report**
The Save Report button allows you to create a copy of a report with a particular set of filters and data options selected.

For example, a “Cases Closed in Previous Month” report might display all cases closed by all offices and contain a number of columns. If you wanted that report for a particular office, you could open the report, select the office in the Assigned Office filter and possibly make changes to the columns displayed and the order of the columns, then click Run Report. You could repeat that process the next month, and the next. Alternatively, you could make the changes once, click Run Report, then click Save Report and give the saved report an appropriate name such as “Cased Closed in Previous Month (Central Office)”. The saved report would include the office filter and all the changes to displayed columns.

Note that the saved report is not a copy of the data, but a copy of the structure of the report (the filters and columns). To preserve a snapshot of the data in a report at a specific point in time, print the report or export it.
Printing a Report
Each report has a printer icon at the top right of the data table. Clicking the icon will open a new browser tab (or window), expand the report to include all rows, then bring up the print dialog. After selecting a printer, the new tab (or window) can be closed.

The printout will display the report name, the selected filters, the date and time the report was run, and of course the data rows.

Exporting a Report
Each report has a green X icon at the top right of the data table. Clicking this icon will refresh the page and provide a link to download the report data table in XLS format. That file can be saved or opened directly in Excel (or any program that understands the XLS format).

Note that this is a snapshot of the data at the time the report was run. There is no connection between the XLS file and the database after the XLS file is created.

Administrators can configure a site to export reports in an advanced format that does not have limitations of the XLS format such as only 255 characters per cell. On a site with this option, an XML file is exported. The XML format can be read by Excel 2003 or later, and later versions of most spreadsheet programs, like LibreOffice Calc. An individual computer might need a one-time configuration to associate XML files with Excel or Calc.