BarAlliance

Discipline

Copyright 2006
BarAlliance a division of LegalSpan, Inc.
All Rights Reserved

TABLE OF CONTENTS

FILES

Summary

The Summary page displays all cases assigned to the employee logged in. For example if bar employee Jane Doe logs in and clicks on the Summary page, she will see a listing of all cases assigned to her as well as any calendared events for those cases.

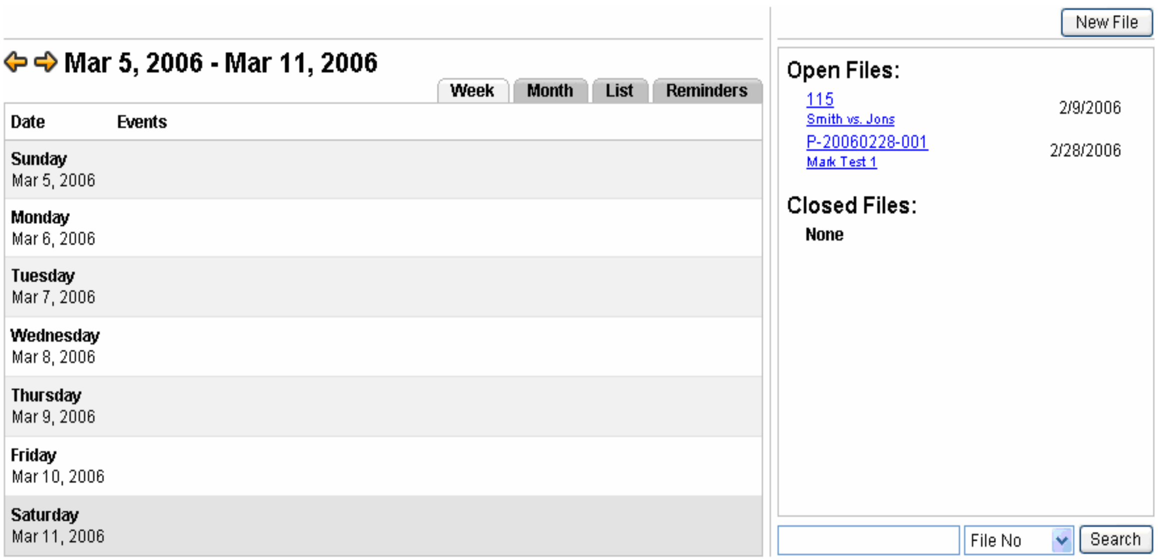


Fig. disc1

Calendar

The calendar displays any calendared events for the case and can be viewed three ways by clicking on the **Week**, **Month**, **List** or **Reminders** tabs as shown in Fig. disc2.

Fig. disc2

To navigate to another month on the calendar, click on the arrows as shown below.

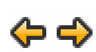


Fig. disc3

The **Week** view, which only shows a one-week period is shown in Fig. disc1. This is the default view, however, the next time the employee logs in, the calendar tab they last viewed will be recalled and displayed.

The **Month** view displays the days for an entire month is shown in Fig. disc3.

Fig. disc4

To view a list of calendard case events, click on the **List** tab. The initial display is the next 20 events starting from the current day.

Fig. disc5

Navigating through the months (forward or backward), up to 20 events will be displayed. The date range will be displayed at the top as shown in Fig. disc5.

The **Reminders** view displays any remiders that have been created.

Open/Closed Files

All **Open Files** and the most recent (up to ten) **Closed Files** are displayed on the right side of the screen. Clicking on the case will take you to the page of the case's current stage, i.e. Inquiry, Investigation or Adjudication.

Fig. disc6

Search

A specific case can be searched for by **File No**., **File Name** or **Group No**., as shown below. To search for a case by **File No**., enter the number in the textbox, select **File No** from the dropdown list and click the **Search** button.

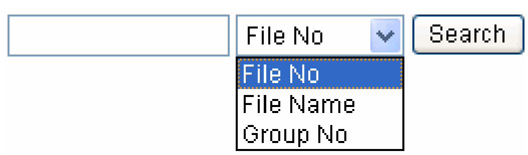


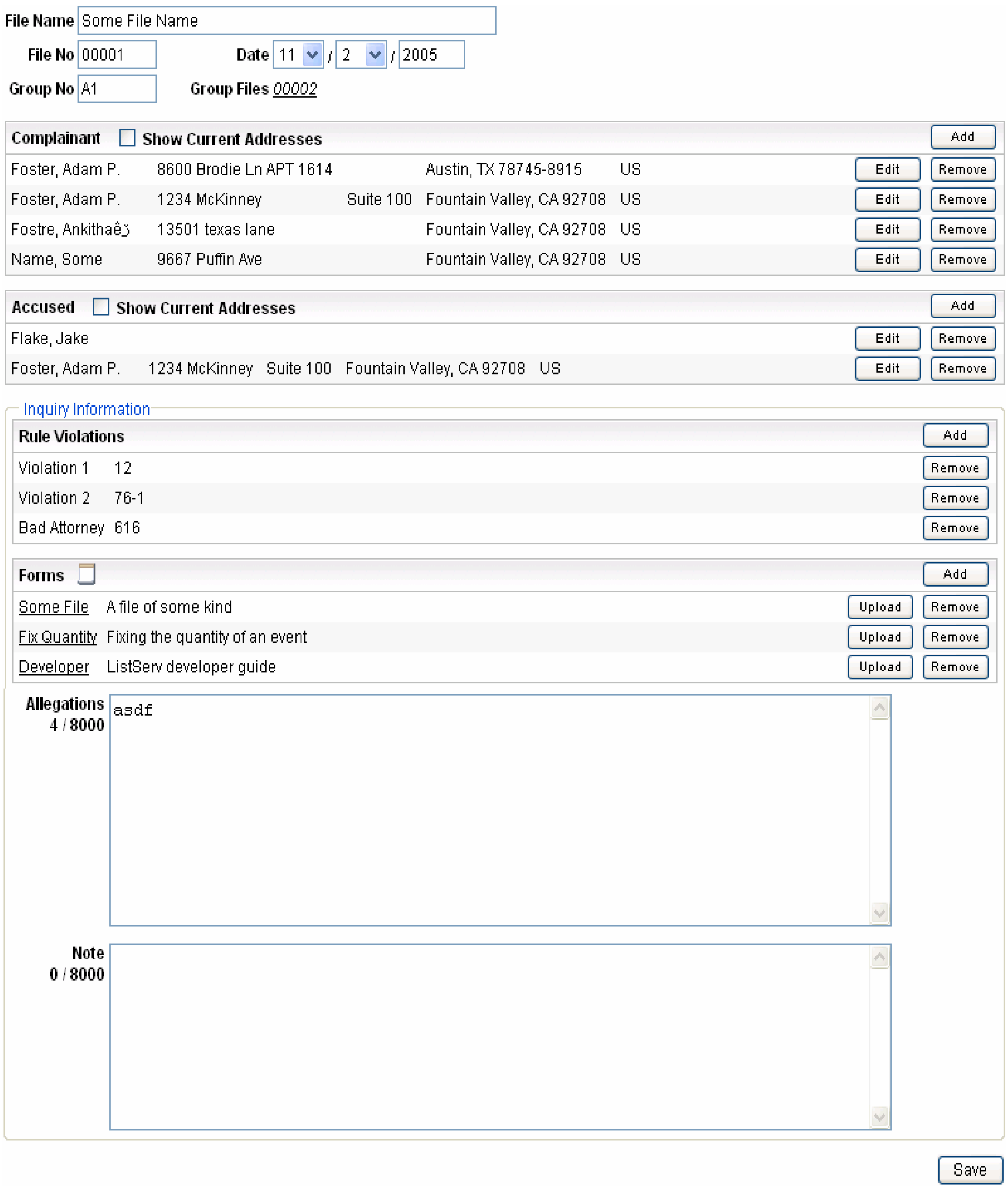
Fig. disc7

New File

To create a new case file, click on the **New File** button, you will be taken to the **Inquiry** page to enter the information for the new case.

Inquiry

The Inquiry page displays the core case information such as the **File Name/Number**, **Complainant**, **Accused**, **Rule Violations**, etc.



BarAlliance

New File

To start a new case file, it must be given a **File Name** and assigned a **File Number**.

The **Date** automatically defaults to the current date, but can be changed if necessary.

Designate the type of disciplinary action the case involves by selecting it from the **Discipline Type** dropdown list.

If a file is related to another file, a **Group Number** can be assigned to group the files together. Enter the same **Group Number** in each case file to be grouped together. Any **Group Files** will be shown on each file's record.

Fig. disc8

Complainant

To add a **Complainant**, click on the **Add** button. A dialog window will appear. If the Complainant is a member of the bar, they can be searched for by entering their **Last** name, **First** name or **Member ID** in the **Search** textbox, then click on the magnifying glass icon.

For example, enter ***Foster*** in the textbox, select **Last** from the dropdown list and click the magnifying glass. As shown below, a list will be displayed to choose from.

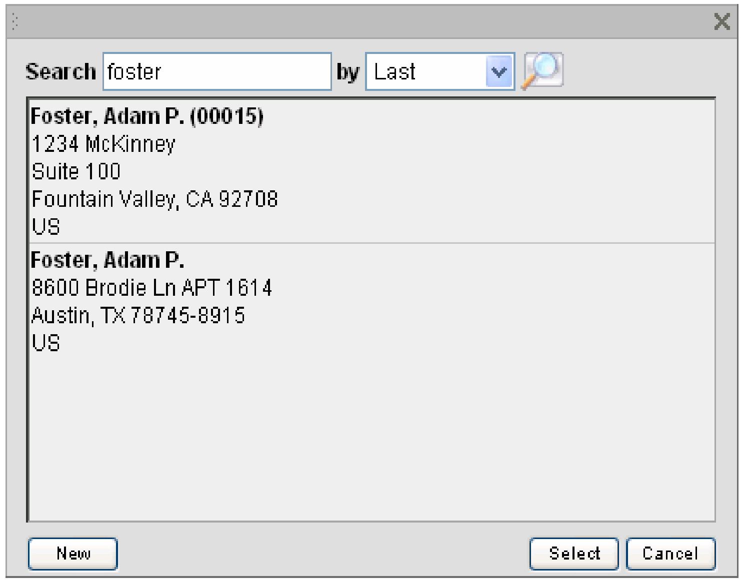


Fig. disc9

Click the one wanted and then the **Select** button. The information will be shown in the **Complainant** section as shown below.

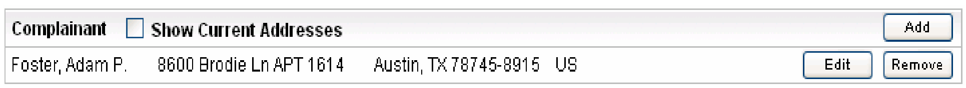


Fig. disc10

If the Complainant is not a member of the bar, click the **New** button shown in Fig. disc9. This will open the dialog window shown below in Fig. disc11. Enter the Complainant's contact information into the appropriate areas.

If the Complainant's contact information changes, click the **Edit** button. A dialog window will appear where the information can be changed. When all changes have been made, click the **Save** button. This will update the Complainant's contact information throughout the **BarAlliance** system with the execption of any other cases they may be involved in. The other cases will retain the contact information that was current at the time the case was opened. To display the Complainant's current contact information, click the box labeled **Show Current Address**, as shown above in Fig. disc10.

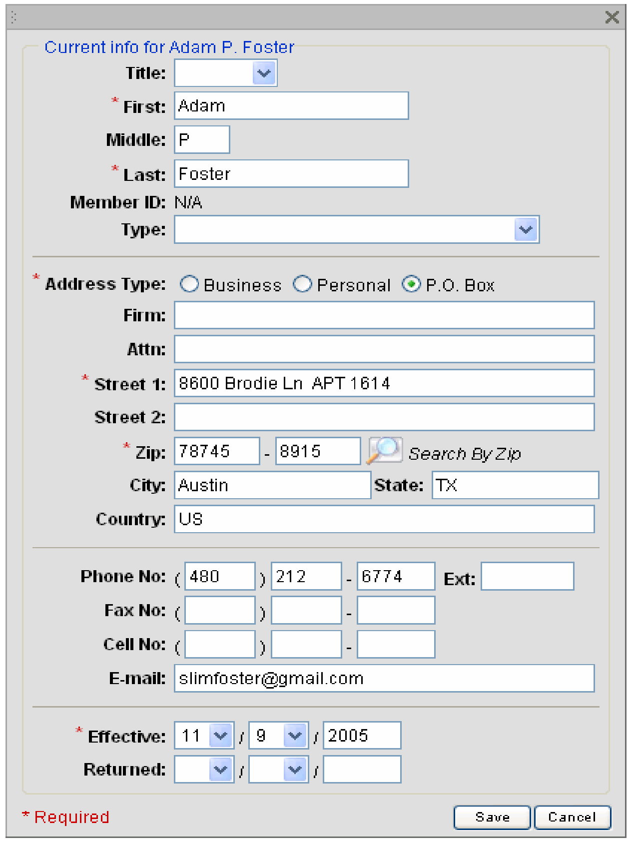


Fig. disc11

To remove a complainant, click on the **Remove** button for the one to be removed.

NOTE: There is no limit on the number of Complainants for a case. Repeat the steps above to add as many as needed.

Accused

To add the **Accused**, click on the **Add** button. A dialog window will appear. The **Accused** can be searched for by entering their **Last** name, **First** name or **Member ID** in the **Search** textbox, then click on the magnifying glass icon.

For example, enter ***00015*** in the textbox, select **Member ID** from the dropdown list and click the magnifying glass. As shown below, the results will be displayed to choose from.

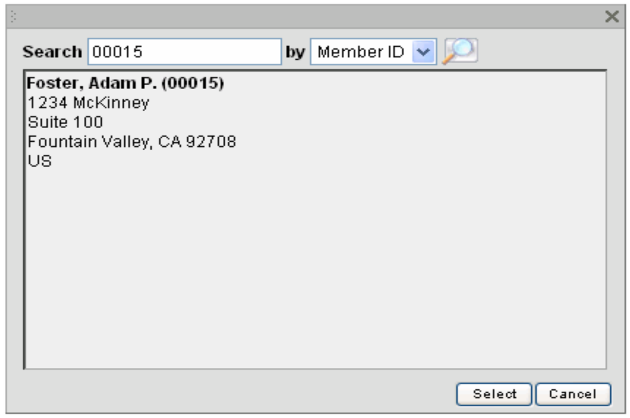


Fig. disc12

Click the displayed result, then the **Select** button. The information will be shown in the **Accused** section as shown below.

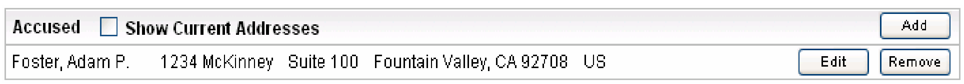


Fig. disc13

If the Accused's contact information changes, click the **Edit** button. A dialog window will appear where the information can be changed. When all changes have been made, click the **Save** button. This will update the Accused's contact information throughout the **BarAlliance** system with the execption of any other cases they may be involved in. The other cases will retain the contact information that was current at the time the case was opened. To display the Accused's current contact information, click the box labeled **Show Current Address**, as shown above in Fig. disc13.

NOTE: There is no limit on the number of Accused for a case. Repeat the steps above to add as many as needed.

Rule Violations

To specify which rule the Accused is alleged to have violated, click the **Add** button. Select the rule from the dropdown list, then click the **Save** button.

Fig. disc14

The rule will appear in the **Rule Violations** section as shown below. To remove a rule, click the **Remove** button.

Fig. disc15

NOTE: There is no limit on the number of Rule Violations for a case. Repeat the steps above to add as many as needed.

Forms

The **Forms** section allows the documentation of any forms or documents used in a case. To add a standard form, click on the document icon shown below.

Fig. disc16

A dialog window will appear displaying a list of standard forms to choose from.

Fig. disc17

Select the desired form by clicking on the **Download** link. A dialog window will appear where you can either immediately **Open** the form or **Save** it to your computer.

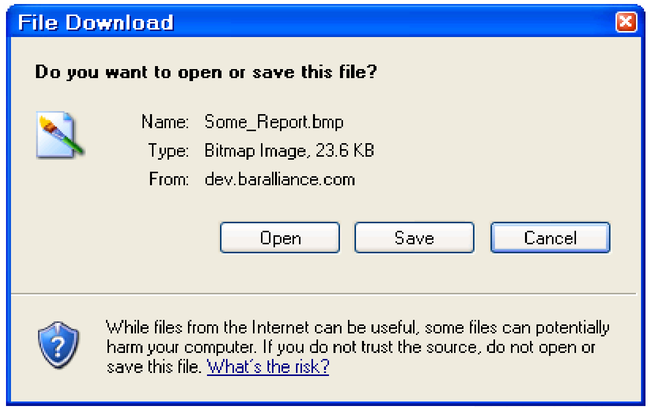


Fig. disc18

To add a form that is not one of the standard forms, click on the **Add** button. A dialog window will appear to upload the form. Click the **Browse** button, locate the form and click on the **Open** button. The file path will be displayed as shown below. Click the **Upload** button.

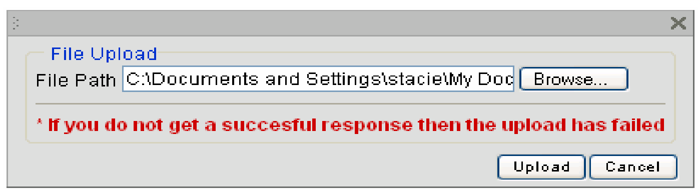


Fig. disc19

A new dialog window will appear where the **Title** of the form can be entered as well as a **Description**. When finished, click the **Save** button.

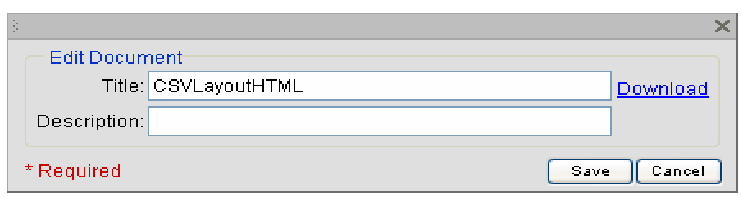


Fig. disc20

The new form will be displayed in the **Forms** section as shown below.

Fig. disc21

To update a form, click the **Upload** button to upload a different version of the form.

To remove a form, click the **Remove** button.

NOTE: There is no limit on the number of Forms for a case. Repeat the steps above to add as many as needed.

Allegations/Note

The **Allegations** section is a free-text area where the allegations of the case can be recorded in detail.

The **Note** section is a free-text area where any notes regarding the case can be entered.

Once all available information has been entered, click the **Save** button.

Investigation

The Investigation section allows the **Investigation Status** of the case to be modified, tracking of case **Attorneys**, **Staff** and events.

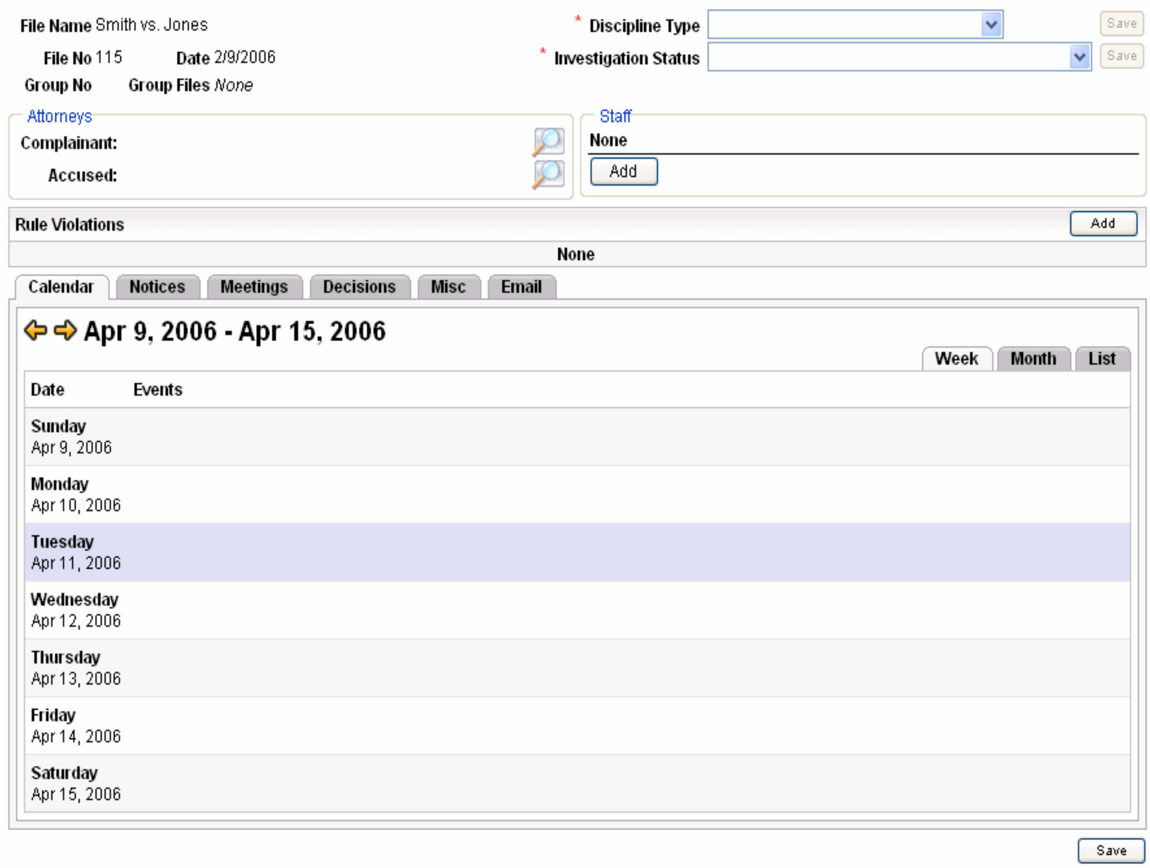


Fig. disc22

Discipline Type

To set the **Discipline Type** of the case file, select the desired type from the dropdown list, then click the **Save** button.

Fig. disc23

Investigation Status

To set the **Investigation Status** of the case file, select the desired status from the dropdown list, then click the **Save** button.

Fig. disc24

Attorneys

The Attorneys section displays the attorneys for both the **Complainant** and the **Accused**.

To enter an attorney for **Complainant** , click on the magnifying glass icon on the **Complainant** line. To enter an attorney for the **Accused**, click on the magnifying glass icon on the **Accused** line. A dialog window will appear where you can search for the attorney by **Last** name, **First** name or **Member ID**.

For example, enter ***11*** in the **Member ID** textbox and click the magnifying glass icon. Member number 11 will be displayed as shown below.

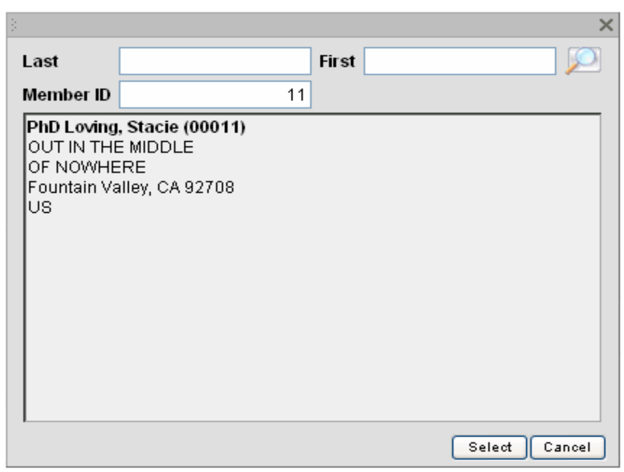


Fig. disc25

Click on the desired member, then click on the **Select** button. The selected attorney will be displayed as shown below.

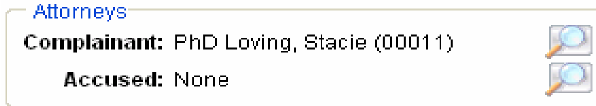


Fig. disc26

NOTE: There is no limit on the number of attorneys for Complainants or Accused. Repeat the steps above to add as many as needed

Staff

The Staff section displays the staff assigned to the case. The employee entering the case will automatically be added to the staff list.

Add

To add a staff member to the case click the **Add** button. A dialog window will appear where you can search for the attorney by **Last** name, **First** name.

For example, enter ***Fleming*** in the **Last** textbox and click the magnifying glass icon. All employees with the last name Fleming will be displayed as shown below.

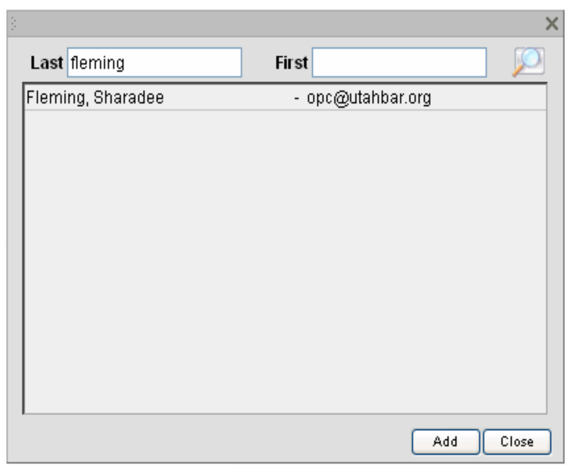


Fig. disc27

Click on the desired staff member, then click on the **Add** button. When finished adding staff, click the **Close** button. The selected staff member will be displayed as shown below.

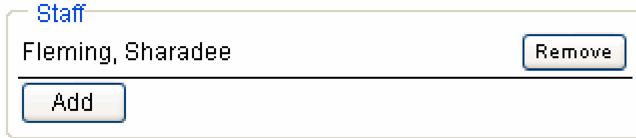


Fig. disc28

Remove

To remove a staff member from a case, click on the Remove button for that employee.

Rule Violations

The Rule Violations section displays the rule(s) the Accused is alleged to have violated.

Add

To add rule violations, click the **Add** button. Select the rule from the dropdown list, then click the **Save** button.

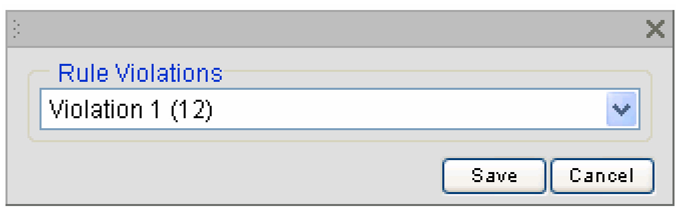


Fig. disc29

The rule will appear in the **Rule Violations** section as shown below.

Fig. disc30

Remove

To remove a rule, click the **Remove** button.

NOTE: There is no limit on the number of Rule Violations for a case. Repeat the steps above to add as many as needed.

Calendar

The calendar displays any calendared events for the case and can be viewed three ways by clicking on the **Week**, **Month** or **List** tabs as shown below.

Fig. disc31

To navigate to another month on the calendar, click on the arrows as shown below.

Fig. disc32

The **Week** view shows a one-week period. This is the default view, however, the next time the employee logs in, the calendar tab they last viewed will be recalled and displayed.

The **Month** view displays the days for an entire month is shown below.

Fig. disc33

To view a list of calendard case events, click on the **List** tab. The initial display is from the current day until the end of the month as shown below.

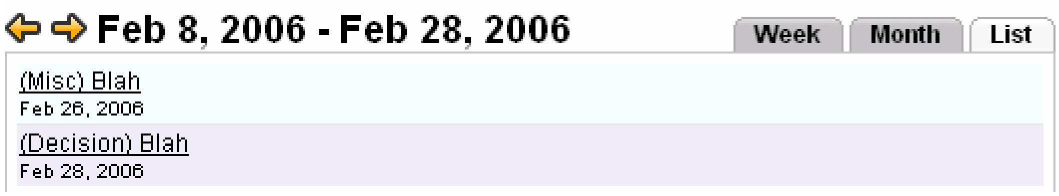


Fig. disc34

Navigating through the months (forward or backward), up to 20 events will be displayed. The date range will be displayed at the top as shown above.

Notices

The Notices section allows for the sending and tracking of **Notices** that have been sent or received during the case.

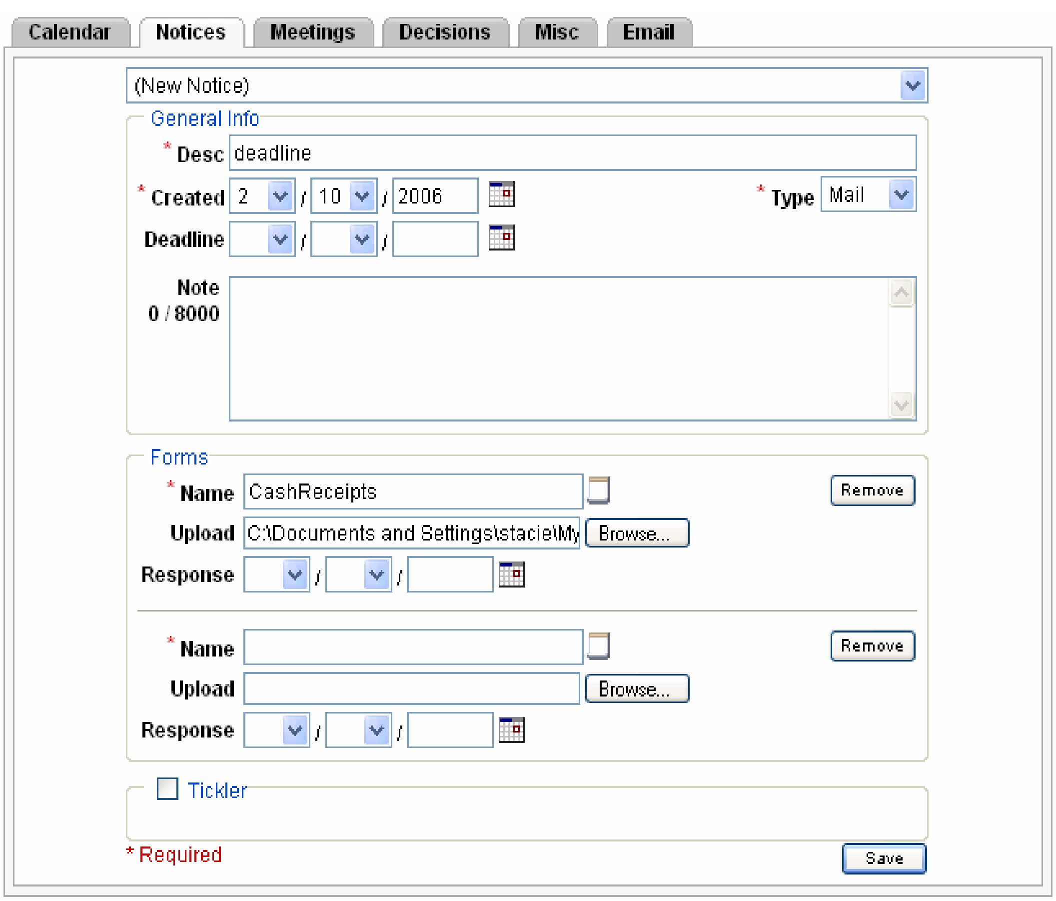


Fig. disc35

BarAlliance

To create a new notice, select **New Notice** from the dropdown list. Next, enter a description, the date created, the type of notice (email, fax or mail), and a deadline and/or note if necessary.

For example, to send an email notice on February 10, 2006 of a filing deadline of April 1, 2006, select **New Notice** from the dropdown list, in the **General Info** section enter ***Filing Deadline*** in **Desc** textbox, select the date **Created** (default is the current date) and select the ***Email*** **Type** of notice from the dropdown list. See Fig. disc35 below.

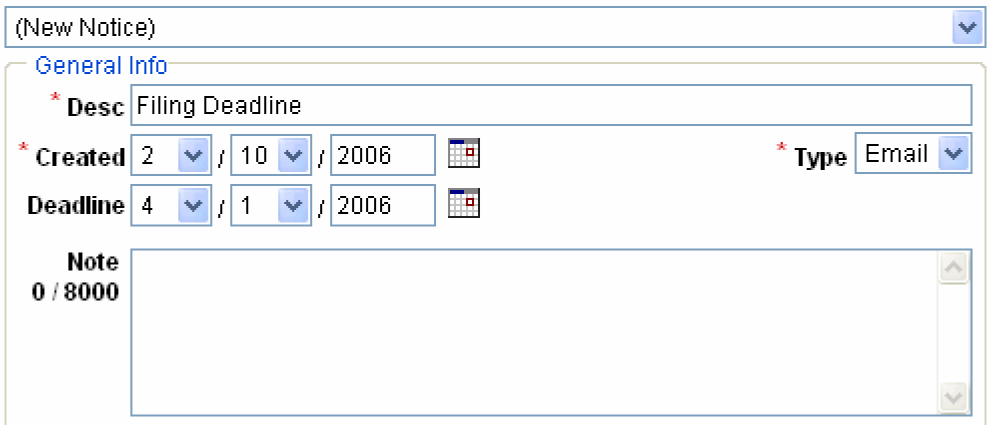


Fig. disc36

If there is a specific form to be filed this can be included in the email notice by selecting the form in the **Forms** section.

For example, to include a standard form, click the document icon (). A dialog window will appear displaying a list of standard forms. Click the document and click the **Select** button. The **Name** will automatically be entered in the textbox.

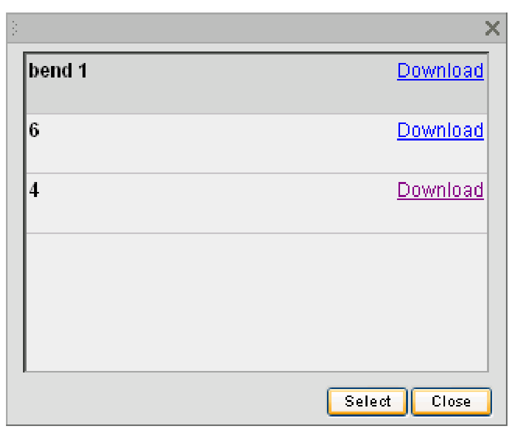


Fig. disc37

Check the box labeled **Tickler** to set a reminder for the deadline. The description is synchronized with the description in the **General Info** section. Anything entered in one will be copied in the other.

For example, to set a calendar reminder to start on March 1, 2006 and to continue every week until the deadline on April 1, 2006, select ***3/1/2006*** from the **Remind Me** dropdown lists, enter ***7*** in the **Every** textbox and select ***Days*** from the dropdown list, check the **Until** box and select ***4/1/2006*** as shown below.

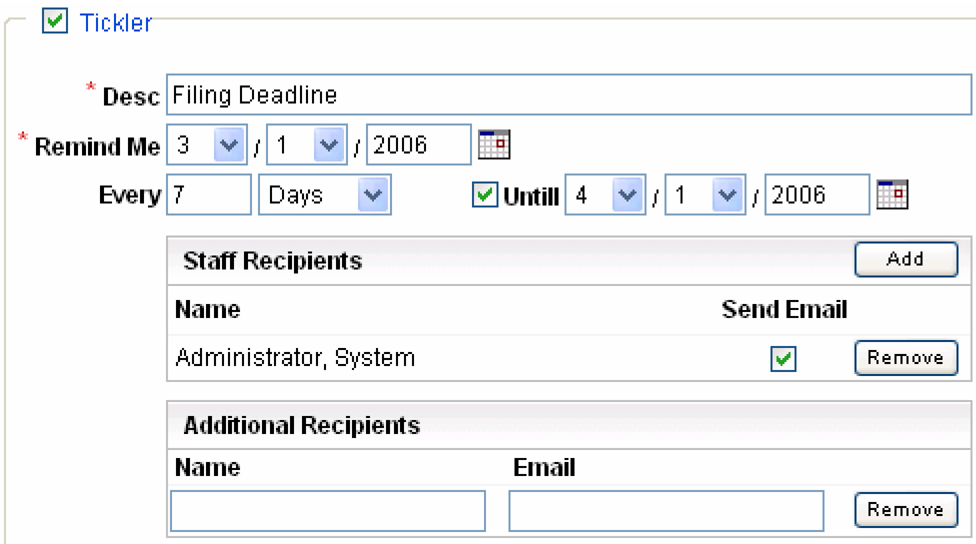


Fig. disc38

The employee entering the notice is automatically designated as a **Staff Recipient** as shown above. Other employees can be added by clicking on the **Add** button. A dialog window will appear where you can search for the attorney by **Last** name, **First** name. Click on the desired staff member, then click on the **Add** button. When finished adding staff, click the **Close** button.

In addition to adding a reminder to the staff's calendar, an email reminder can be automatically sent by checking the **Send Email** box. The selected staff member and email reminder designation will be displayed as shown above.

A reminder can also be sent to non-staff members by entering their **Name** and **Email** address in the **Additional Recipients** section as shown below.

Fig. disc39

When all information is entered, click the **Save & Email** button. This will redirect you to the **Email** tab.

Meetings

The Meetings section allows the tracking and entry of new or previously held meetings for inclusion on the calendar.

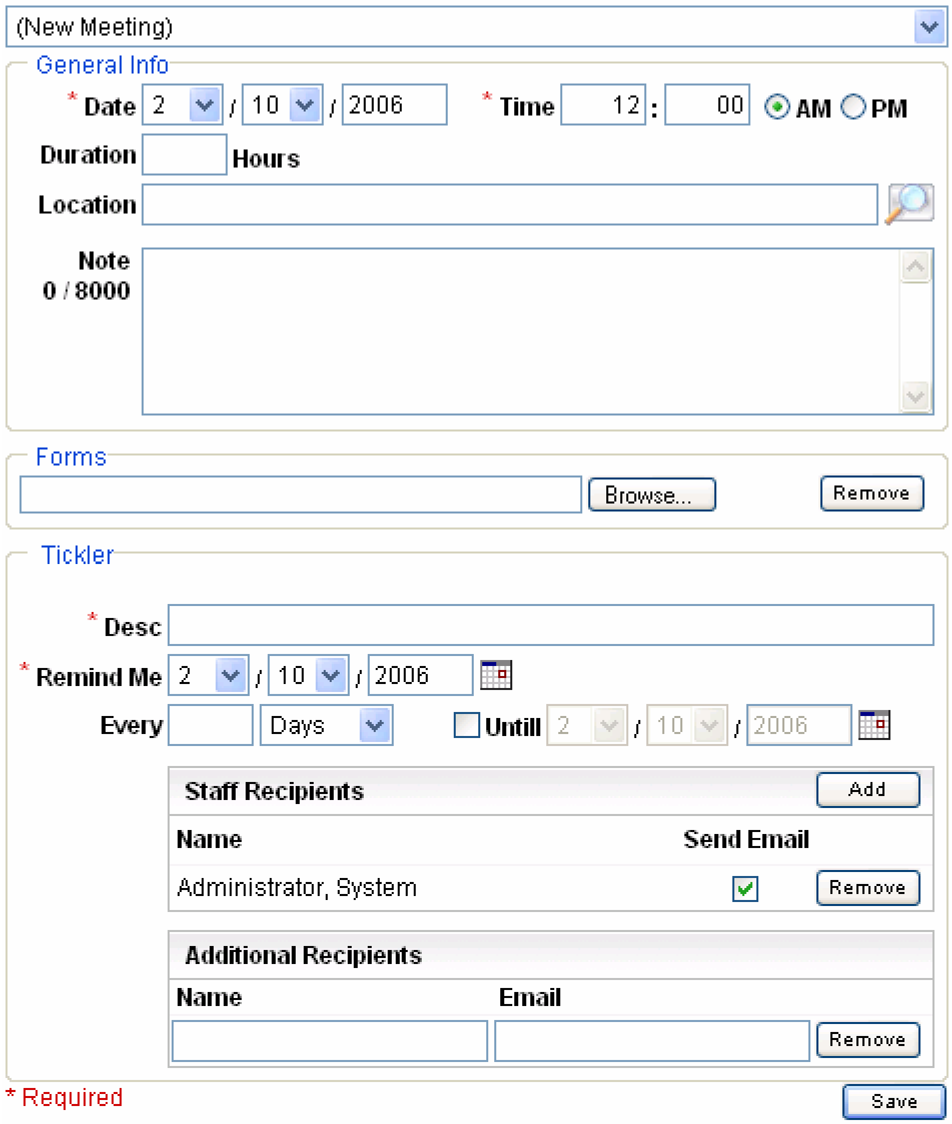


Fig. disc40

To create a new meeting, select **New Meeting** from the dropdown list. Next in the **General Info** section, enter the date, time, duration and location of the meeting. A note can be included also.

For example, to enter a meeting for 1:00 pm on February 15, 2006 lasting approximately 2 hours at the Hall of Justice, select ***2/15/2006*** from the **Date** dropdown lists, enter ***1:00 pm*** for the **Time**, ***2*** in the **Duration** textbox and ***Hall of Justice*** in the **Location** textbox. See Fig. disc40 below.

Fig. disc41

In the **Tickler** section, enter a description (or title) for the meeting, the date to start reminders for the meeting, how often to remind and the date to remind until

For the example below, the **Desc** is ***Initial Meeting***, the reminders will begin on ***February 11, 2006*** and continue every day until ***February 15, 2006***.

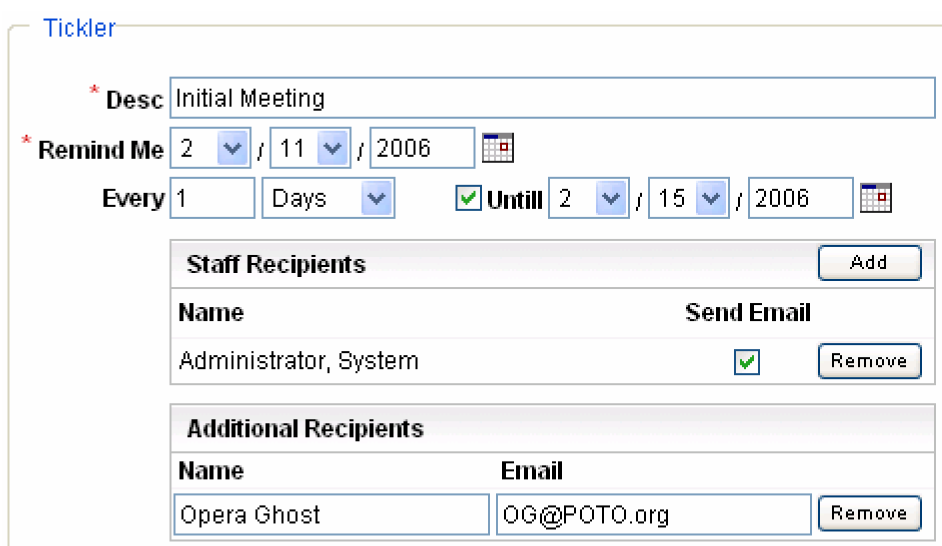


Fig. disc42

Decisions

The Decisions section allows the tracking and entry of new or previously decisions for inclusion on the calendar.

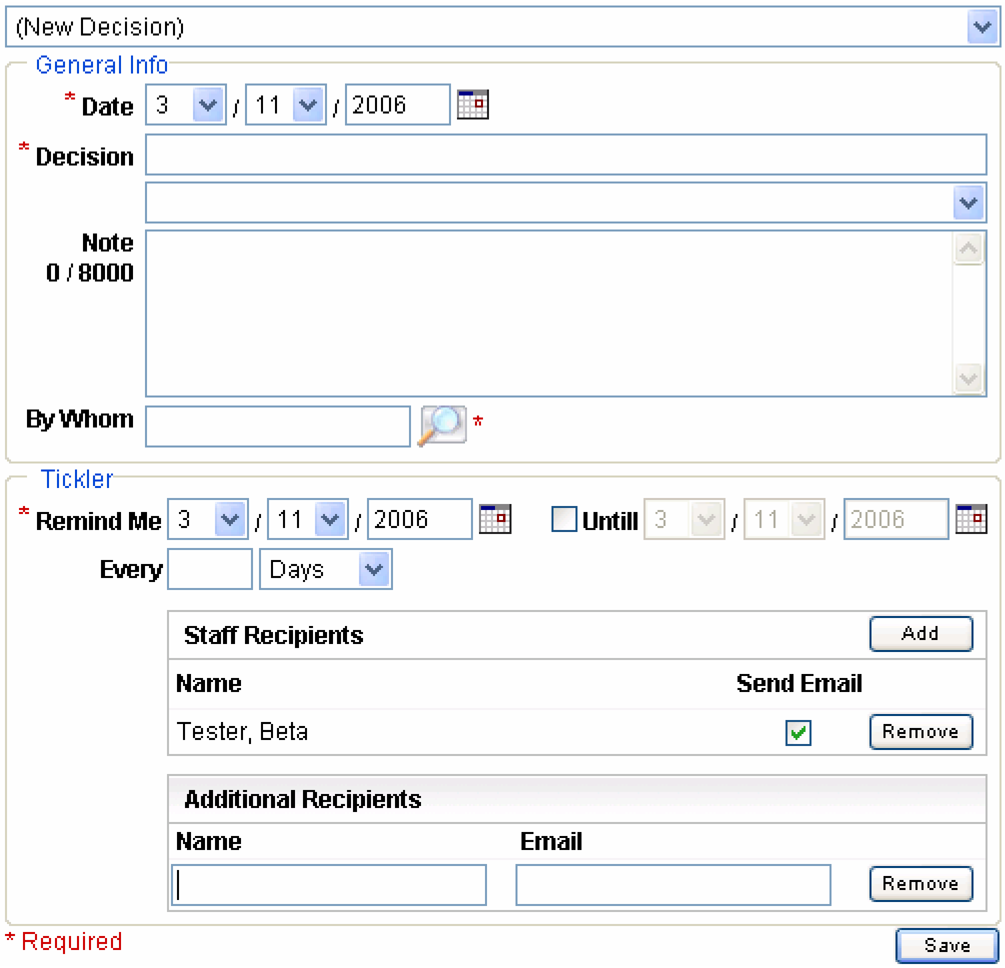


Fig. disc43

To create a new decision, select **New Decision** from the dropdown list. Next in the **General Info** section, enter the date and the decision. A note can be included also. Finally enter the decision maker in the textbox labeled **By Whom**. The decision maker can be searched for by entering their **Last** name, **First** name or **Member ID** in the **Search** textbox, then click on the magnifying glass icon.

For example, to enter a decision, enter the date of the decision, the decision, a note if necessary and who made the decision. See below.

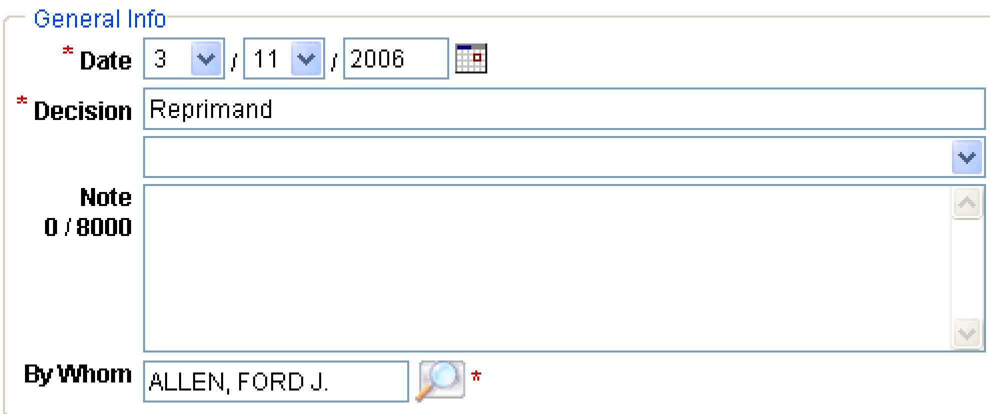


Fig. disc44

In the **Tickler** section, enter the date to start reminders of the decision, how often to remind and the date to remind until

For the example below, the reminders will begin on ***March 11, 2006*** and continue every three months until ***March 11, 2007***. When finished, click the **Save** button.

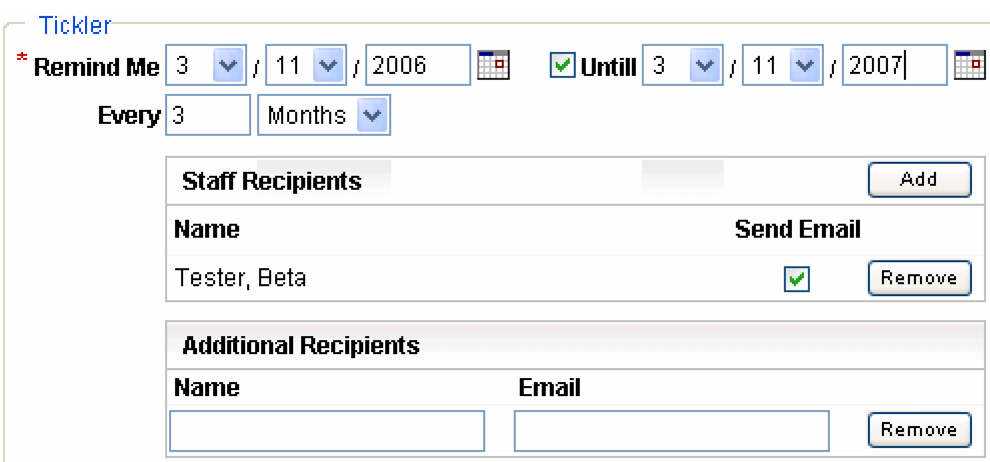


Fig. disc45

Miscellaneous

Enter the date to start reminders of the miscellaneous, how often to remind and the date to remind until

For the example below, the reminders will begin on ***March 11, 2006*** and continue every day until ***March 18, 2006***. When finished, click the **Save** button.

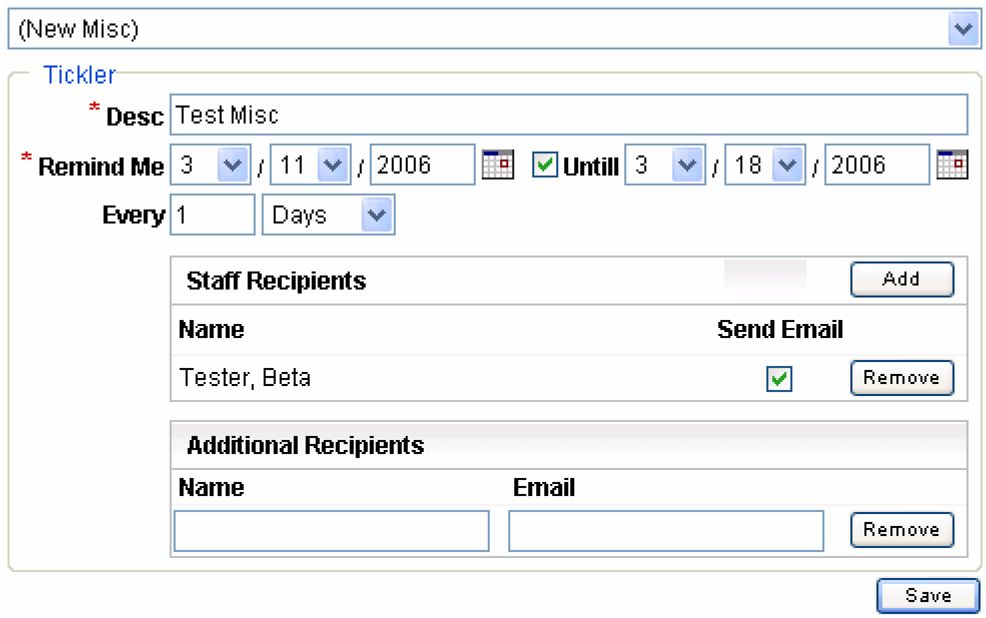


Fig. disc46

Email

The **Email** tab allows emails to be sent to those involved in the case. Enter the email address of the recipients in the 'To' field, attach any files or documents as needed and click the **Send** button.

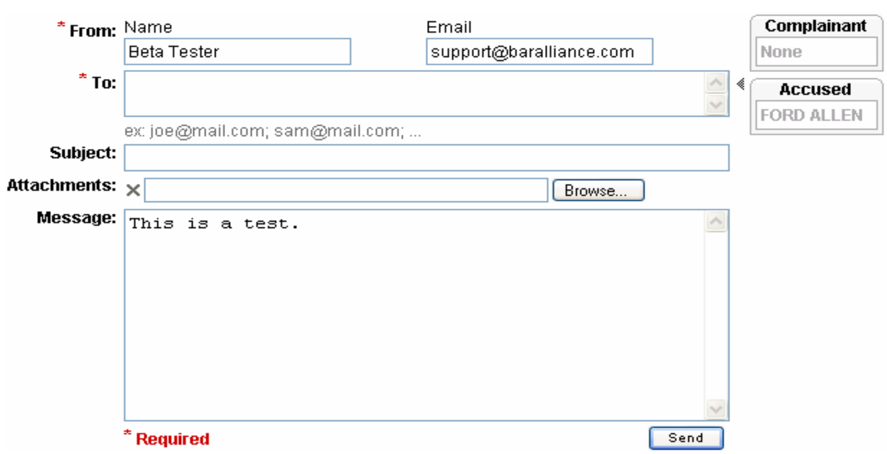


Fig. disc47

Adjudication

Adjudication displays the case information as well as any decisions made about the case.

Rule Violations

To specify which rule the Accused is alleged to have violated, click the **Add** button. Select the rule from the dropdown list, then click the **Save** button.

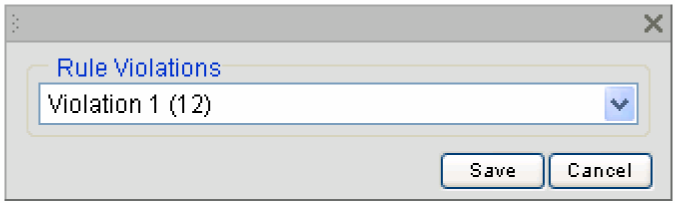


Fig. disc48

The rule will appear in the **Rule Violations** section as shown below. To remove a rule, click the **Remove** button.

Fig. disc49

NOTE: There is no limit on the number of Rule Violations for a case. Repeat the steps above to add as many as needed.

New Adjudication

To add a new decision, click the [+] next to New. A form will open with a dropdown list to select a decision, the resulting display is based on selection made in the Rules Matrix as discussed in the next chapter.

For this example, select *Abeyance* from the dropdown list. As shown below, per the Rules Matrix for the Abeyance category, the Court Information, Fees, Member Type/Status and the calendar are displayed.

Once all information has been entered, click the **Save** button.

Next, enter the decision maker in the textbox labeled **By Whom**. For this example, enter ‘*Fleming’* and click the magnifying glass icon. A dialog window will be displayed showing all Flemings as shown below. Click on the correct one and then the **Select** button.

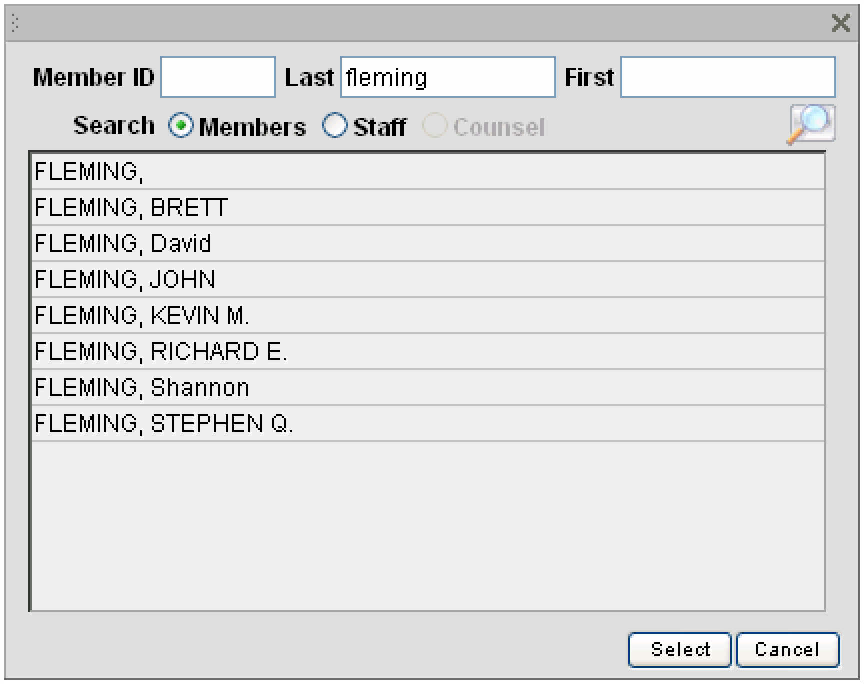


Fig. disc50

Court Information

Next enter the Court Information for the case. Enter the number of the case in the textbox labeled **Case N**o. Enter the judge of the case in the textbox labeled **Judge**.

The judge can be searched for by entering the first or last name and clicking on the magnifying glass. The dialog window shown above will be displayed. Choose the correct one and click the **Select** button.

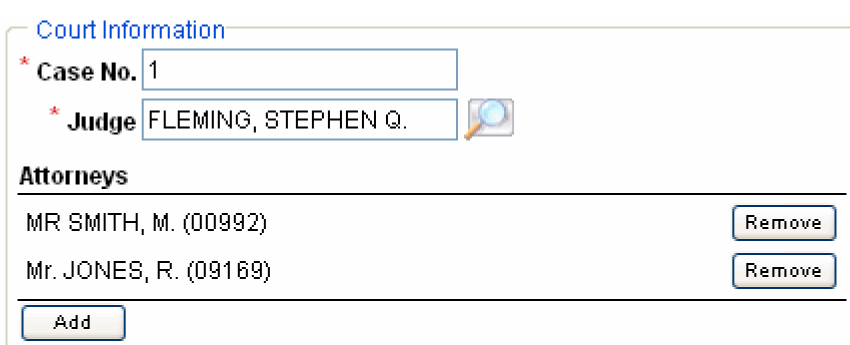


Fig. disc51

Next add the attorneys for the complainant and the accused by clicking on the **Add** button. A dialog window will be displayed as shown below.

The attorney can be searched for by entering last name, first name or member ID and clicking on the magnifying glass. A list of attorneys matching the search criteria will be returned. Choose the correct one and click the **Select** button.

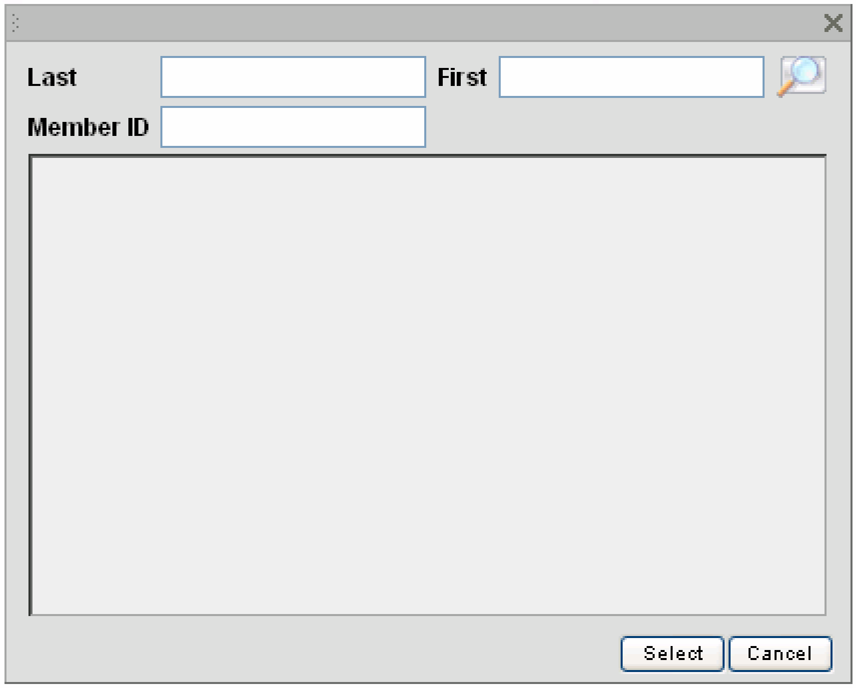


Fig. disc52

To remove an attorney, click the **Remove** button for that attorney.

Fees

To assign a fee, select the fee from the dropdown list and enter the amount in the textbox next to it. To remove a fee, click the **X** next to that fee.

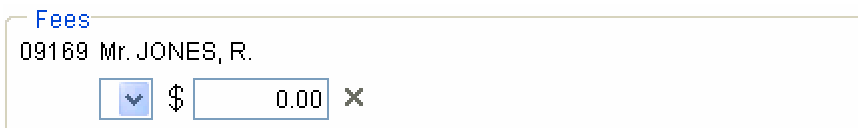


Fig. disc53

MemberType/Status

The member type and status of the accused is displayed in the Member Type/Status section. If the new decision changes either the member's type or status, that change can be made here by selecting the appropriate type or status from the dropdown lists. This change will be effective system-wide.

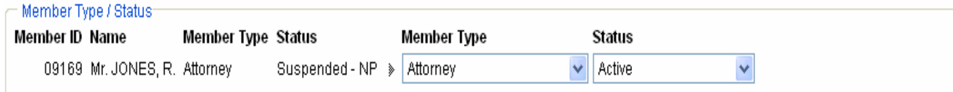


Fig. disc54

Calendar

The calendar displays any calendared events for the case and can be viewed three ways by clicking on the **Week**, **Month** or **List** tabs as shown below.

Fig. disc55

To navigate to another month on the calendar, click on the arrows as shown below.

Fig. disc56

The **Week** view shows a one-week period. This is the default view, however, the next time the employee logs in, the calendar tab they last viewed will be recalled and displayed. The **Month** view displays the days for an entire month.

To view a list of calendard case events, click on the **List** tab. The initial display is from the current day until the end of the month as shown below.

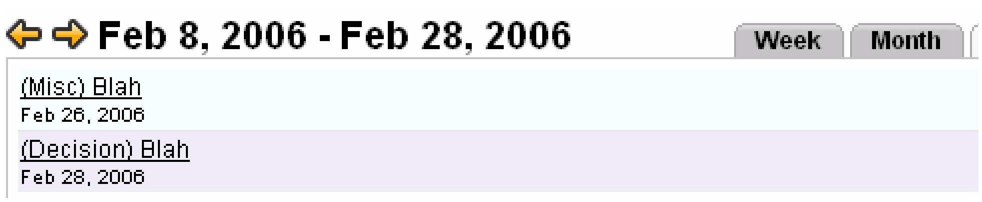


Fig. disc57

Navigating through the months (forward or backward), up to 20 events will be displayed. The date range will be displayed at the top as shown above.

Notices

The Notices section allows for the sending and tracking of **Notices** that have been sent or received during the case.

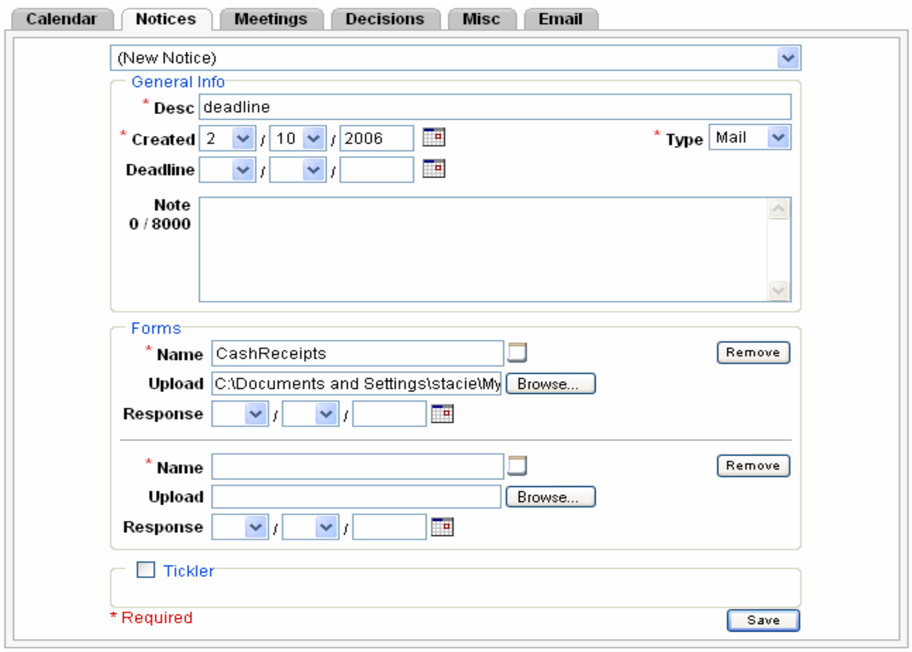


Fig. disc58

To create a new notice, select **New Notice** from the dropdown list. Next, enter a description, the date created, the type of notice (email, fax or mail), and a deadline and/or note if necessary.

For example, to send an email notice on February 10, 2006 of a filing deadline of April 1, 2006, select **New Notice** from the dropdown list, in the **General Info** section enter ***Filing Deadline*** in **Desc** textbox, select the date **Created** (default is the current date) and select the ***Email*** **Type** of notice from the dropdown list. See Fig. disc35 below.

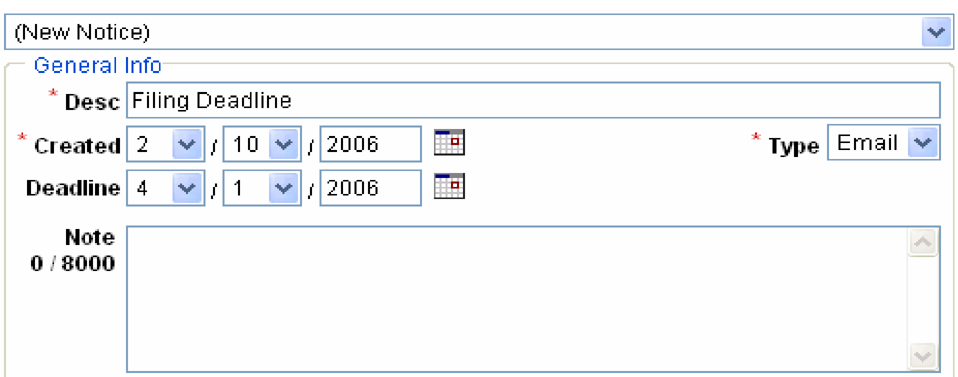


Fig. disc59

If there is a specific form to be filed this can be included in the email notice by selecting the form in the **Forms** section. For example, to include a standard form, click the document icon (). A dialog window will appear displaying a list of standard forms. Click the document and click the **Select** button. The **Name** will automatically be entered in the textbox.

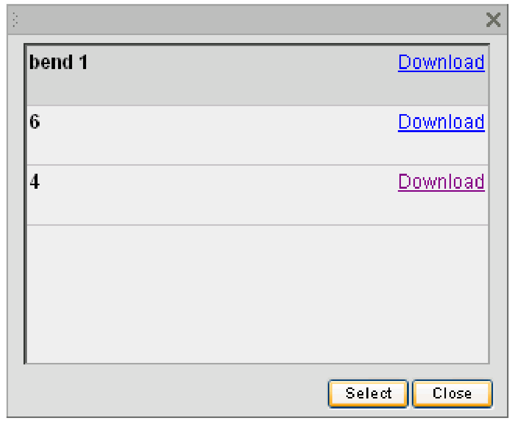


Fig. disc60

Check the box labeled **Tickler** to set a reminder for the deadline. The description is synchronized with the description in the **General Info** section. Anything entered in one will be copied in the other.

For example, to set a calendar reminder to start on March 1, 2006 and to continue every week until the deadline on April 1, 2006, select ***3/1/2006*** from the **Remind Me** dropdown lists, enter ***7*** in the **Every** textbox and select ***Days*** from the dropdown list, check the **Until** box and select ***4/1/2006*** as shown below.

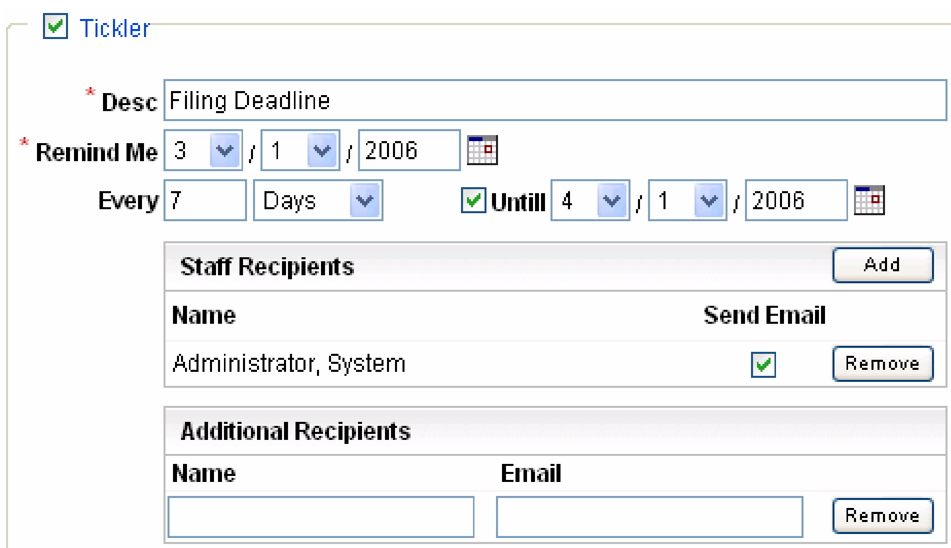


Fig. disc61

The employee entering the notice is automatically designated as a **Staff Recipient** as shown above. Other employees can be added by clicking the **Add** button. A dialog window will appear where you can search for the attorney by **Last** name, **First** name. Click the desired staff member, then on the **Add** button. When finished, click the **Close** button.

In addition to adding a reminder to the staff's calendar, an email reminder can be automatically sent by checking the **Send Email** box. The selected staff member and email reminder designation will be displayed as shown above. A reminder can also be sent to non-staff members by entering their **Name** and **Email** address in the **Additional Recipients** section as shown below.

Fig. disc62

When all information is entered, click the **Save & Email** button. This will redirect you to the **Email** tab.

Meetings

The Meetings section allows the tracking and entry of new or previously held meetings for inclusion on the calendar.

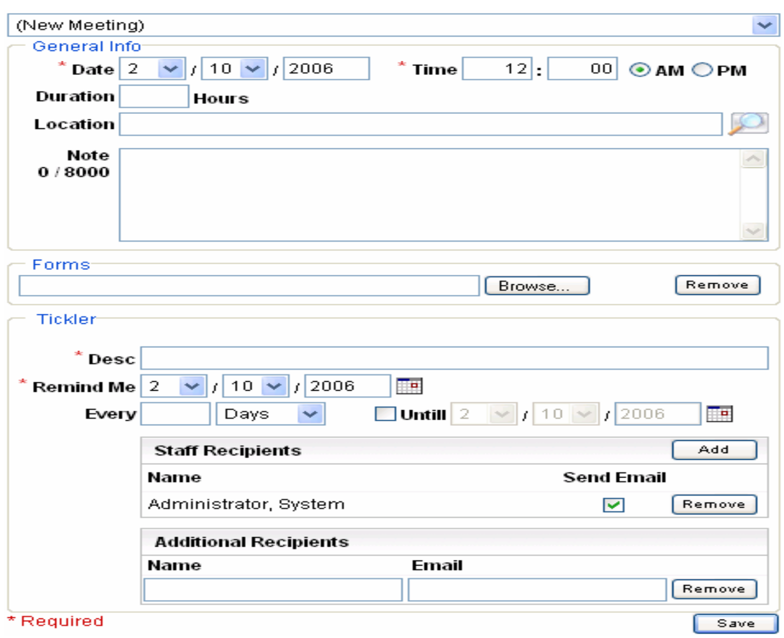


Fig. disc63

BarAlliance

To create a new meeting, select **New Meeting** from the dropdown list. Next in the **General Info** section, enter the date, time, duration and location of the meeting. A note can be included also.

For example, to enter a meeting for 1:00 pm on February 15, 2006 lasting approximately 2 hours at the Hall of Justice, select ***2/15/2006*** from the **Date** dropdown lists, enter ***1:00 pm*** for the **Time**, ***2*** in the **Duration** textbox and ***Hall of Justice*** in the **Location** textbox. See Fig. disc40 below.

Fig. disc64

In the **Tickler** section, enter a description (or title) for the meeting, the date to start reminders for the meeting, how often to remind and the date to remind until

For the example below, the **Desc** is ***Initial Meeting***, the reminders will begin on ***February 11, 2006*** and continue every day until ***February 15, 2006***.

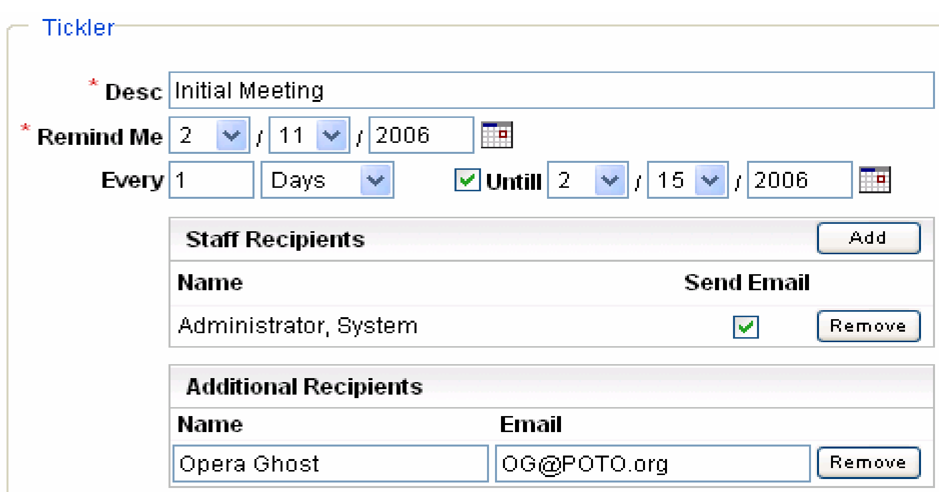


Fig. disc65

Decisions

The Decisions section allows the tracking and entry of new or previously decisions for inclusion on the calendar.

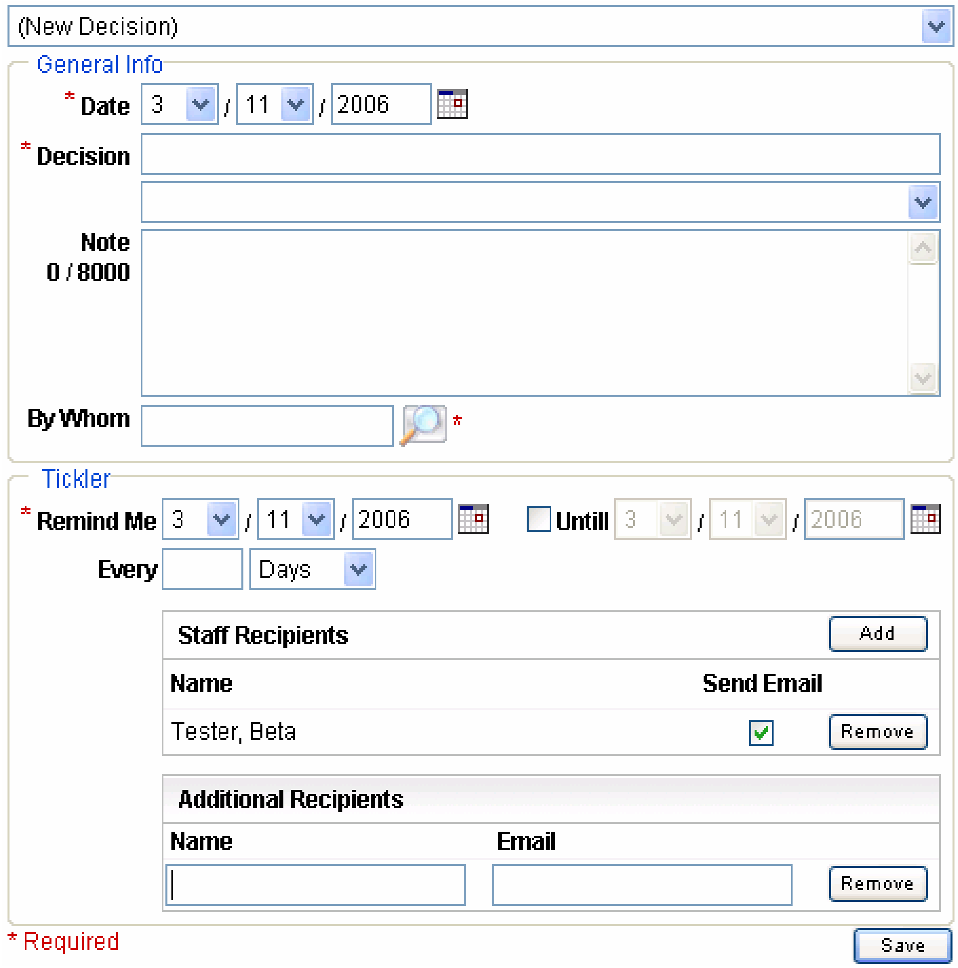


Fig. disc66

To create a new decision, select **New Decision** from the dropdown list. Next in the **General Info** section, enter the date and the decision. A note can be included also. Finally enter the decision maker in the textbox labeled **By Whom**. The decision maker can be searched for by entering their **Last** name, **First** name or **Member ID** in the **Search** textbox, then click on the magnifying glass icon.

For example, to enter a decision, enter the date of the decision, the decision, a note if necessary and who made the decision. See below.

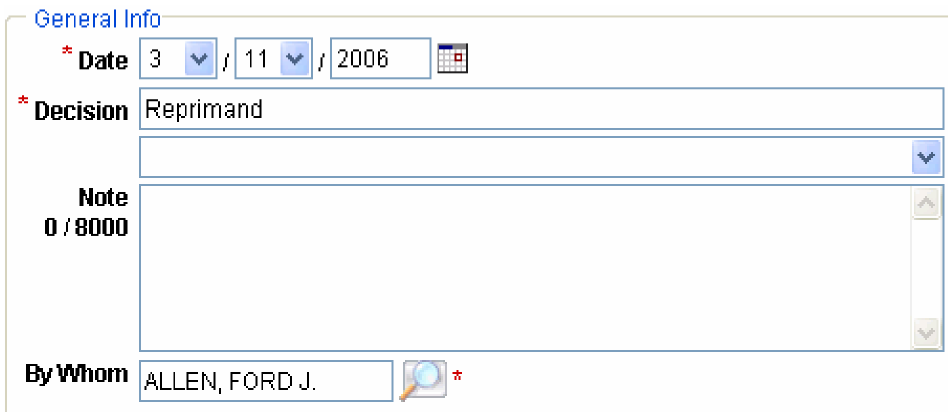


Fig. disc67

In the **Tickler** section, enter the date to start reminders of the decision, how often to remind and the date to remind until

For the example below, the reminders will begin on ***March 11, 2006*** and continue every three months until ***March 11, 2007***. When finished, click the **Save** button.

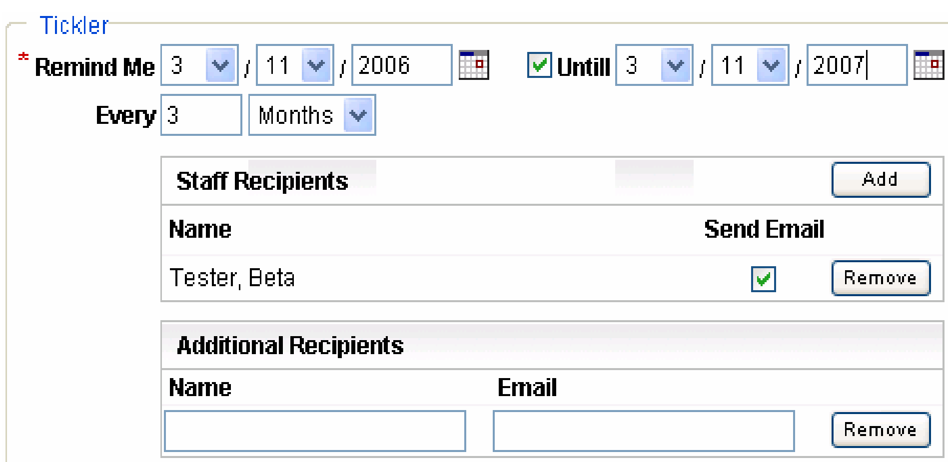


Fig. disc68

Miscellaneous

Enter the date to start reminders of the miscellaneous, how often to remind and the date to remind until

For the example below, the reminders will begin on ***March 11, 2006*** and continue every day until ***March 18, 2006***. When finished, click the **Save** button.

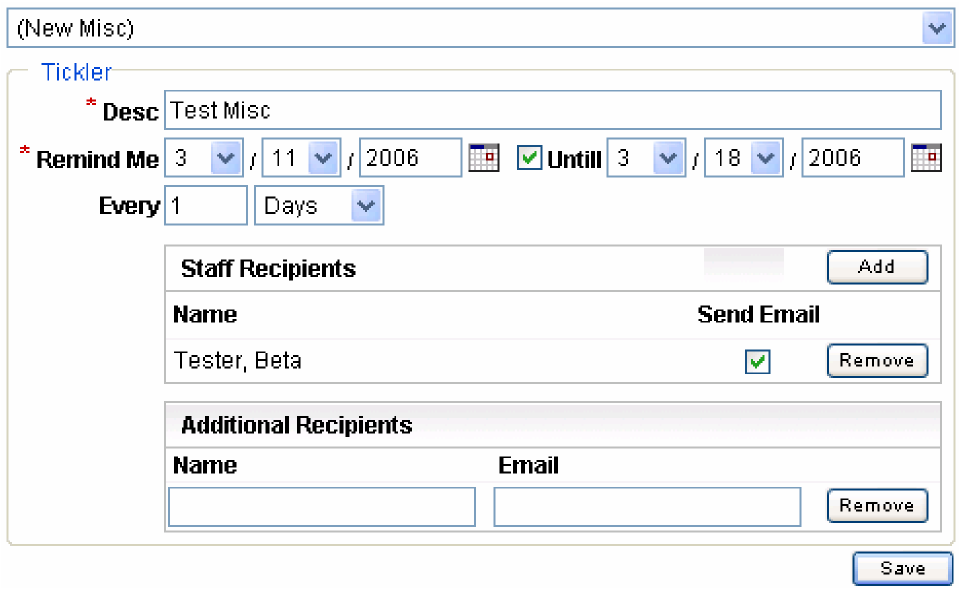


Fig. disc69

Email

The **Email** tab allows emails to be sent to those involved in the case. Enter the email address of the recipients in the ‘To’ field, attach any files or documents as needed and click the **Send** button.

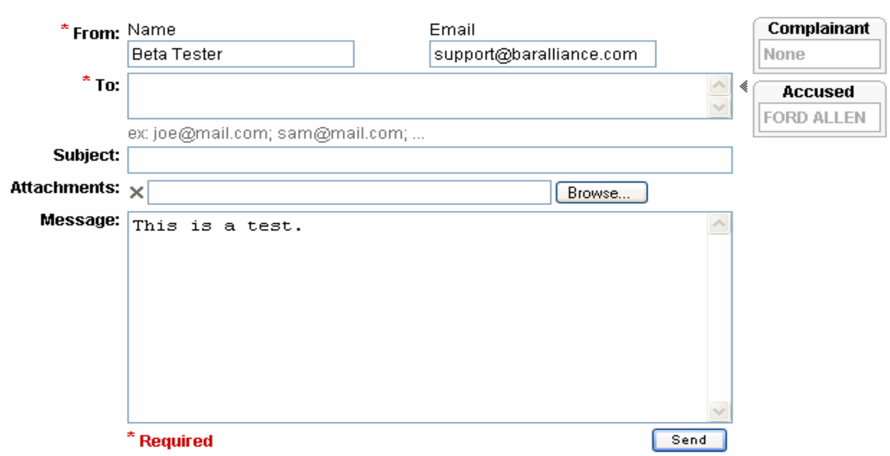


Fig. disc70

Master Calendar

The calendar displays any calendared events for the case and can be viewed three ways by clicking on the **Week**, **Month**, **List** or **Reminders** tabs as shown below. The **Master Calendar** displays all calendared events for the entire disciplinary department.

Fig. disc71

To navigate to another month on the calendar, click on the arrows as shown below.

Fig. disc72

The **Week** view, which only shows a one-week period is shown in Fig. disc1. This is the default view, however, the next time the employee logs in, the calendar tab they last viewed will be recalled and displayed.

The **Month** view displays the days for an entire month is shown in Fig. disc3.

Fig. disc73

To view a list of calendard case events, click on the **List** tab. The initial display is the next 20 events starting from the current day.

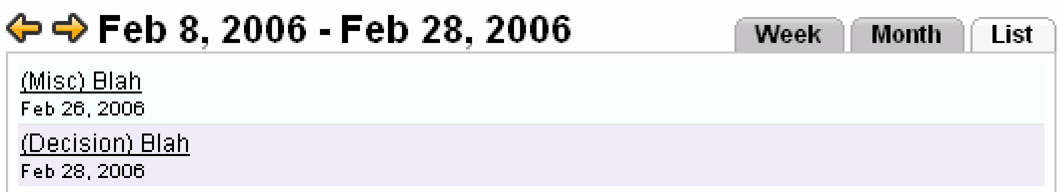


Fig. disc74

Navigating through the months (forward or backward), up to 20 events will be displayed. The date range will be displayed at the top as shown in Fig. disc5.

The **Reminders** view displays any remiders that have been created.

ADMINSTRATION

Administration allow rules to be established for the Discipline module.

Rules Matrix

The Rules Matrix is used to designate which items are displayed per adjudication decisions, such as Case Info, Event Tracking, Status Change, Fees or Case Closed. A decision category can have several options. The main category is a 'Root' and a derivitive of that category is called a 'Child'.

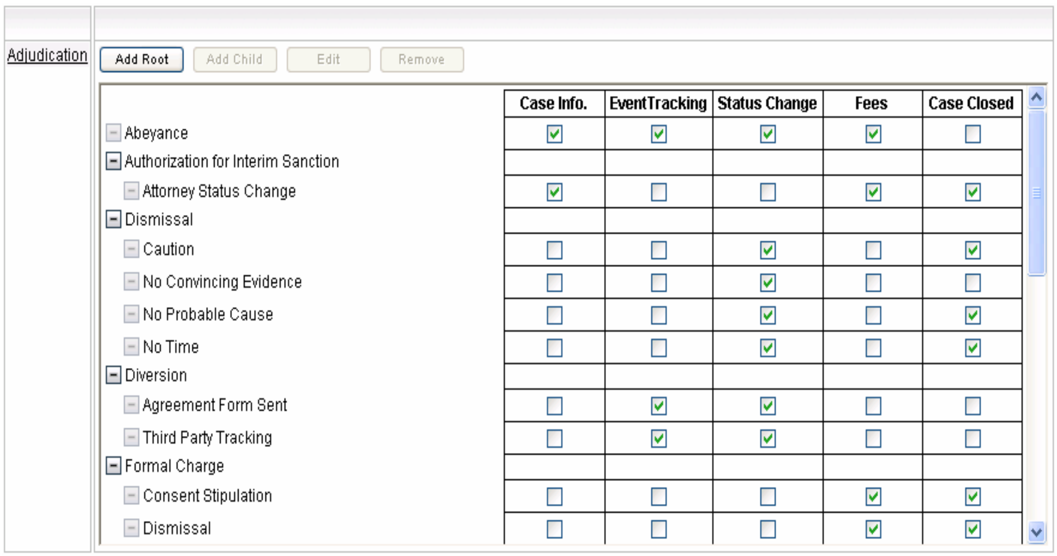


Fig. disc75

Add Root

To add a new decision or decision category, click the **Add Root** button. A dialog window will be displayed. Enter the name of the decision and click the **OK** button.

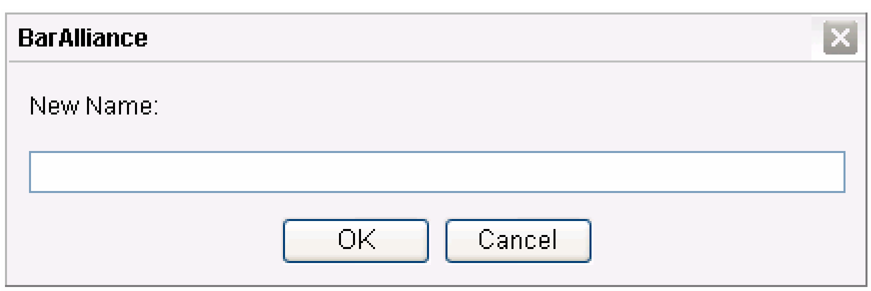


Fig. disc76

The new decision will be displayed in the list. To designate the decision category, check the box in the Case Info, Event Tracking, Status Change, Fees or Case Closed columns. A decision can have several categories

Add Child

To add a subcategory to a decision, click the **Add Child** button. A dialog window will be displayed. Enter the name of the decision and click the **OK** button.

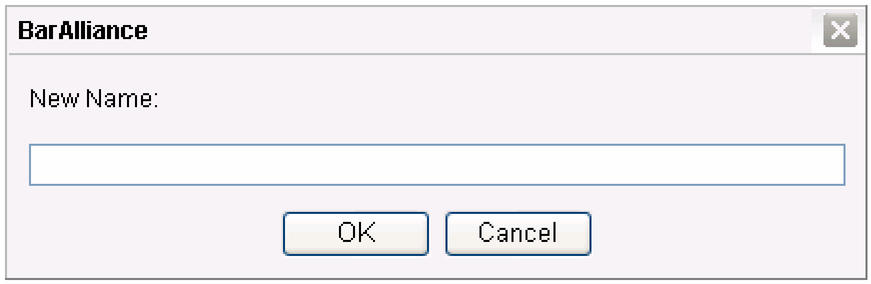


Fig. disc77

The new decision 'child' will be displayed in the list below the main decision. To designate the decision category, check the box in the Case Info, Event Tracking, Status Change, Fees or Case Closed columns. A decision can have several categories

Edit

To edit either a Root or Child, select the one wanted and click the **Edit** button. A dialog window will be displayed where the title can be edited.

Delete

To delete either a Root or Child, select the one wanted and click the **Remove** button. A dialog window will be displayed to confirm the decision to delete. Click the OK button to delete.

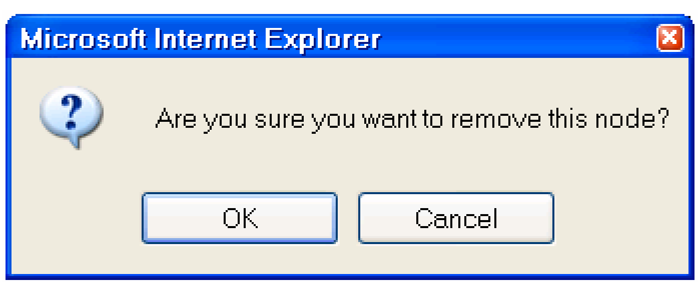


Fig. disc78

List Maintenance

List Maintenance allows you to maintain the data presented in drop down lists displayed throughout the BarAlliance application. Providing pre-determined values for key fields ensures data consistence and improves reporting. Through List Maintenance you can select the list to view, define the columns of the list, filter the list, add data to the list, edit existing list data, delete list entries and combine similar list items together.

Select a List

Click on the name of the list you would like to view.

Fig. disc79

Define the Columns to view

Click on the **Columns** icon ( ) to view a list of available columns.

Select the columns you wish to display. Click the save button to **Save** your selections. These selections will be remembered the next time you log in.

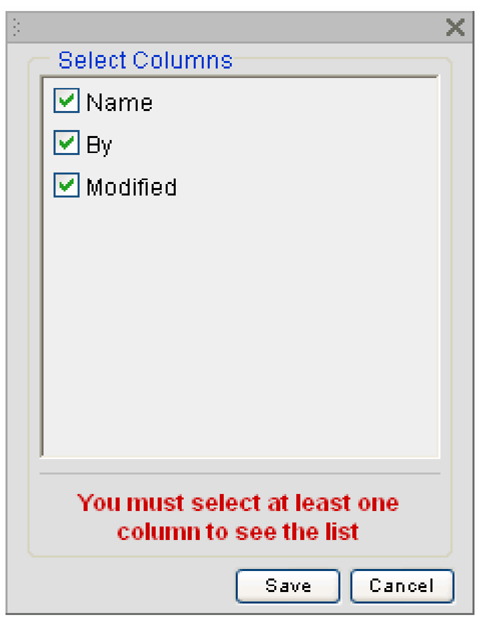


Fig. disc80

Filter the records in the list

You can limit the records displayed in the list by assigning criteria to the list columns. To limit the records displayed, enter at least the first three letters of the criteria word, then select the column to apply the criteria to from the dropdown list and click the **Filter** button.

To see all the list records, set the filter column dropdown to **No Filter** and click on the **Filter** button.

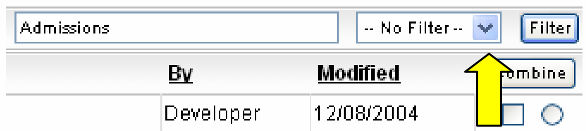


Fig. disc81

Add

Click on the **Add** button. Enter information in the textbox. Click on the **Save** button to save the information or the **Cancel** button to exit without saving.

Fig. disc83

Edit

Click on the **Edit** button. Edit information in textbox. Click on the **Save** button to save the information or the **Cancel** button to exit without saving.

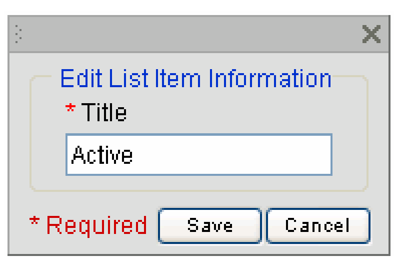


Fig. disc82

Delete

To delete a record, click on the **Delete** button next to that record. A dialog will ask you to verify that you want to delete this record. Click on the **OK** button to delete the record or the **Cancel** button to exit without deleting the record.

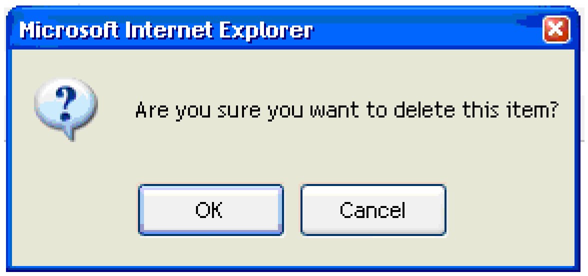


Fig. disc83

If a record is associated with another record in the database, you will not be allowed to delete it as the displayed dialog window will advise.

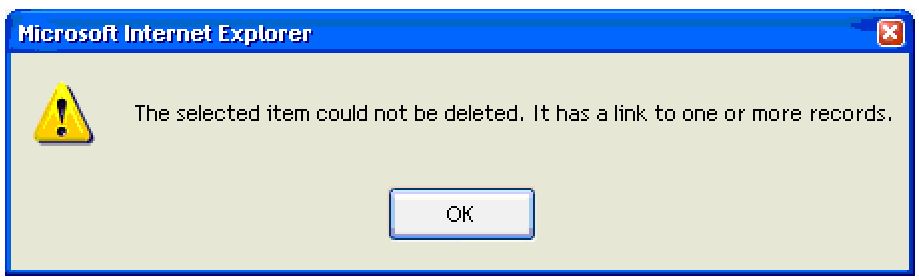


Fig. disc84

Combine

List records can be combined to consolidate and control list items presented throughout the application.

To combine records, click on the radio button (circle) for the record you want to keep. Then click on the check boxes (square) the records you want to combine.

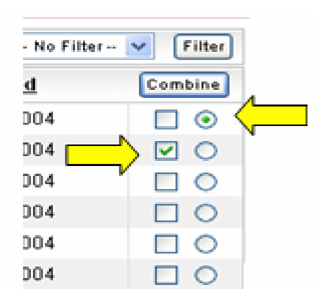


Fig. disc85

Click the **Combine** button.

A dialog will ask you to verify that you want to combine the selected items.

Click on the **OK** button to combine the records or the **Cancel** button to exit without combining records.

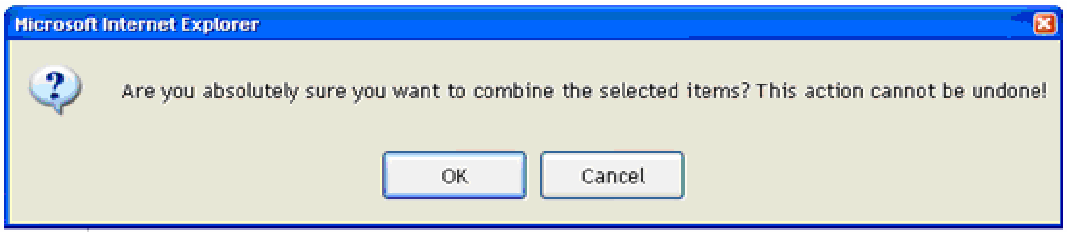


Fig. disc86

Sorting List Items

Click on the Column label to sort the list by that column in ascending order. Clicking on the Column label again will sort the list in descending order. The arrow identifies the sort order direction.

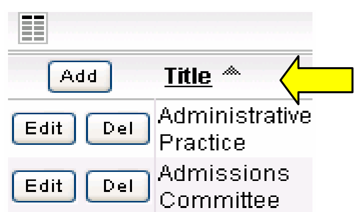
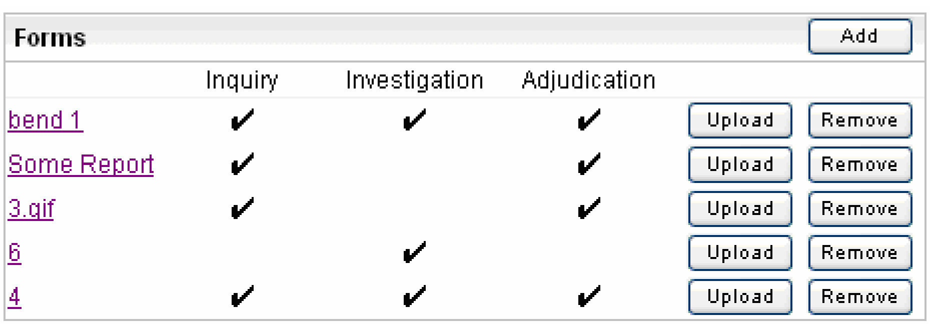


Fig. disc87

Preferences

The Preferences section allows the designation and uploading of standard forms.



Forms | Add

	Inquiry	Investigation	Adjudication		
bend 1	✔	✔	✔	Upload	Remove
Some Report	✔		✔	Upload	Remove
3.gif	✔		✔	Upload	Remove
6		✔		Upload	Remove
4	✔	✔	✔	Upload	Remove

Fig. disc88

Add

To add a form, click the **Add** button. A dialog window will appear as shown below.

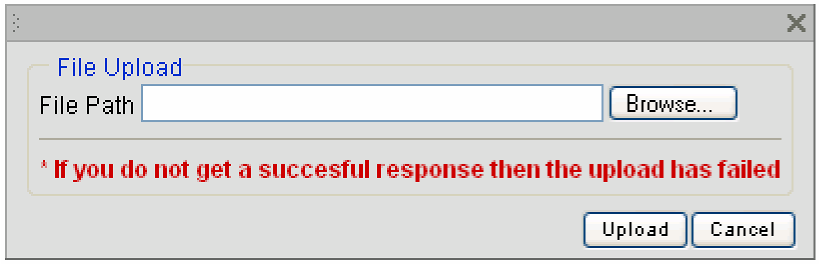


Fig. disc89

Click the **Browse** button, locate the file and click the **Upload** button. A dialog window will appear where a **Title** and **Description** for the new form can be designated as well as which **Stage** the form is for. Click the **Save** button.

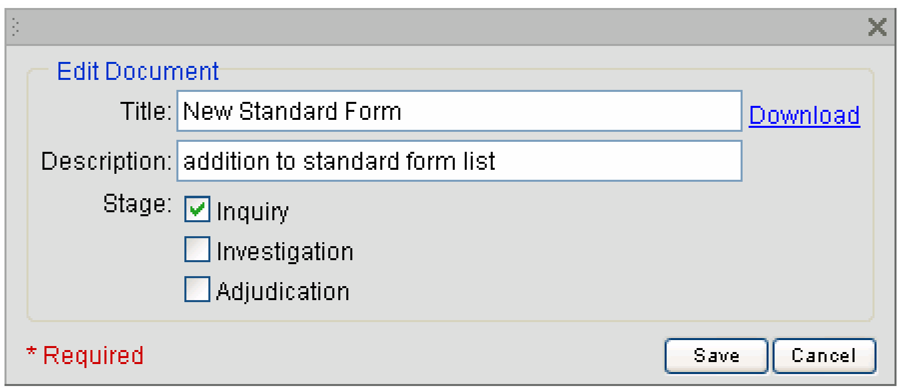


Fig. disc90

Edit

To edit the Title, Description or Stage of a form, click on the link for that form, the dialog window shown above will appear. After making changes, click the **Save** button.

Remove

To remove a form, click on the **Remove** button for that form. The form will immediately be removed from the list of standard forms.

REPORTS

The Reports section allows you to view all reports specific to the Cash Management module.

View Report

To view a report, select the report you want to see. For example, if you want to view the *Cash Batch Audit* report, select that title in the list.

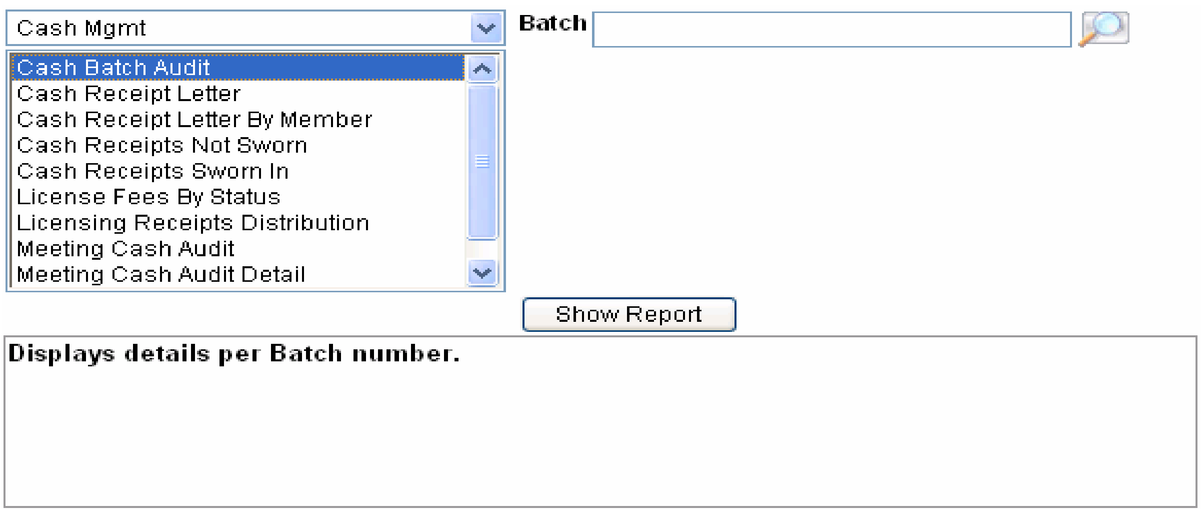


Fig. disc91

A brief description of the report and any parameters that are required to run the report will be displayed. If you want to see an audit of Batch 999, enter 999 into the textbox labeled **Batch** and hit the **Enter** key or click on the **Show Report** button.

You will be presented with a dialog window asking if you would like to open or save the file. Click on the **Open** button to open and view the report.

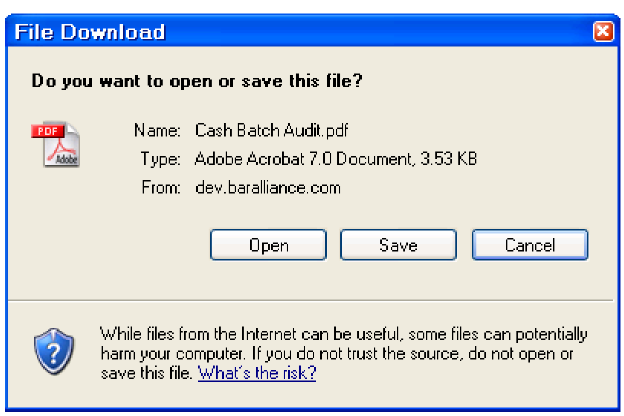


Fig. disc92

The report will then be displayed in either a PDF or CSV format.

Utah State Bar

Cash Receipts Audit

Tuesday, September 27, 2005

Batch Number: 999 **Date Entered:** 12/3/1993 **Amount:** $1,100.00

Type of Entry: Events **Date Deposited:** 12/3/1993 **Entered By:** Sharadee Fleming

Ctrl No.	Ck No.	Mem ID	Payment is For . . .	Payee	Ck Total	Indiv Total	Notes
19341	5064148	00913	HAWKINS, D. MARK M.	PETER K. ELLISON	$100.00	$100.00	
19342	1893	01919	KENNEDY, WENDY C.	KENNETH R. MADSEN	$50.00	$50.00	
19343	1033	05011	HARTILL, MATTHEW W.	PHILLIP KENT CARD	$50.00	$50.00	
19344	2762	03157	URBOM, DAN C J.	JOHN WALSH	$50.00	$50.00	
19345	1212	00265	PASSEY, MICHAEL T C.	INTECH ONE-EIGHTY CORP	$100.00	$100.00	
19346	114508	00506	STONE, DAVID	CALLISTER, DUNCAN	$50.00	$50.00	
19347	12606	02617	ERIN GIVENS, GUY	COHNE, RAPPAPORT	$50.00	$50.00	
19348	4437	00607	BEASLIN, DOUGLAS D.	ADKINS & CHRISTIANSEN	$50.00	$50.00	
19349	754	00688	LORI D CRUCES, DAVID F.	JAMES P. COWLEY	$100.00	$100.00	
19350	85483	03798	JENSEN, M. SCOTT W.	HERITAGE SAVINGS BANK	$100.00	$100.00	
19351	35056	00306	HOUCHINS, R.	MCKAY, BURTON	$100.00	$100.00	
19352	1032	05011	HARTILL, MATTHEW W.	PHILLIP KENT CARD	$100.00	$100.00	
19354	3139	01997	J HARLAN BURNS, CLAIR	JOHN B. MAYCOCK	$100.00	$100.00	
19355	5740	00612	WALKER, DAVID H.	BLAISDELL & CHURCH	$100.00	$100.00	
					$1,100.00	$1,100.00	

Fig. disc93