



**BarAlliance**

*System Administration*

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

## TABLE OF CONTENTS

<b>USER ACCOUNTS</b> .....	<b>1</b>
View Account Information .....	1
Add New Account.....	1
Assign Security Group .....	2
Edit.....	2
Select Security Information.....	3
Delete Account .....	4
Unlocking an Account.....	5
<b>BAR SETUP</b> .....	<b>6</b>
Demographics .....	6
Departments .....	6
Rules Matrix.....	9
Associations .....	9
Free Associations.....	14
MCLE Rules .....	15
Member ID.....	18
Statuses .....	19
Preferences.....	25
Changeable password.....	25
Renewal deadline month.....	25
Renewal deadline day .....	25
Mandatory bar .....	25
Hide completed social security number .....	26
Hide completed race field .....	26
CLE compliance month.....	26
CLE compliance day.....	26
Application Tabs.....	26
<b>CONFIRM CHANGES</b> .....	<b>32</b>
Module Names .....	32
Change Requests.....	33
History.....	34
<b>FIELD LABELS</b> .....	<b>35</b>
Module Names .....	35
Labels.....	36
<b>LIST MAINTENANCE</b> .....	<b>37</b>
Select a List.....	37
Define the Columns to view .....	37
Filter the records in the list .....	38
Add.....	38
Edit.....	38
Delete .....	39
Combine .....	39
Sorting List Items .....	40
<b>SECURITY GROUPS</b> .....	<b>41</b>

<i>Add New Group</i> .....	41
<i>Edit Group</i> .....	42
<i>Remove Group</i> .....	42
<b>Login / Pass</b> .....	<b>44</b>
<i>Setup</i> .....	44

# USER ACCOUNTS

Within User Accounts you can add or delete new accounts, view or edit accounts and security information. This would also be where the administrator for the system at the bar would go to unlock user accounts.

## View Account Information

Click on the person's name whose account information you want to view or edit.

Name ^	Department	Email	Phone No	Add
<a href="#">1. Kermit</a>	Information Services	director@legalspan.com	(999) 999-9999	Delete
<a href="#">2. Harry</a>	Admissions	admissions@baralliance.com	(999) 999-9999	Delete
<a href="#">3. Janet</a>	Information Services	demo@utahbar.org	(999) 999-9999	Delete
<a href="#">Administrator, System</a>	Administration & Finance			Delete
<a href="#">American Dog, Christine</a>		opc@utahbar.org	(999) 999-9999	Delete
<a href="#">Baldwin, Marion</a>	Programs & Services	asstdirector@baralliance.com		Delete
<a href="#">Bevis, Rosemary</a>	Admissions	demo@utahbar.org	(999) 999-9999	Delete
<a href="#">Birrell, Joni</a>		jseeley@utahbar.org	(999) 999-9999	Delete
<a href="#">Brown, John</a>		webmaster@utahbar.org	(999) 999-9999	Delete

Fig. sa1

## Add New Account

Click on the **Add** button. You will see a dialog window that asks for the **New Account Information**. Enter account information in the appropriate text boxes.

**New Account Information**

\* First  Phone No  -  ext.

Middle  Cell No  -

\* Last  Fax No.  -

\* E-mail  \* Department Administration & Finance

\* Login  Position Select Position...

\* Password

\* Confirm Password

\* Required

Save Cancel

Fig. sa2

Click on the **Save** button to save your changes or the **Cancel** button to cancel adding a new account.

## *Assign Security Group*

Click on the member's name in the list and you will then see the new account's information and have the option to assign the new account to a pre-established security group.

The screenshot shows a web-based interface for account management. At the top left is a "Back To List" button. The main content is divided into two sections: "Account Information" and "Security Information".

**Account Information** (with an "Edit" button on the right):

<b>First Name</b> John	<b>Phone</b> (123) 456-7891 ext. 9999
<b>Middle Initial</b> Q	<b>Cell</b> (123) 456-7892
<b>Last Name</b> Public	<b>Fax</b> (123) 456-7893
<b>Email</b> JPublic@example.com	<b>Department</b> Programs & Services
<b>Login</b> JPublic	<b>Position</b> Intake Clerk
	<b>Supervisor</b> Administrator, System

**Security Information** (with a "Save Changes" button on the right):

**Security Groups**

- A Group
- Administration & Finance
- Admissions
- CLE Administration
- Counsel
- Information Services

Buttons: "Add >>" and "<< Remove". A "Show Details..." link is at the bottom left.

Fig. sa3

You can stop at this point and return to the main User Accounts page by clicking on the **Back to List** button or you could also make changes to the information by clicking on the **Edit** button.

## *Edit*

You will see another dialog window allowing you to edit any information in this account.

The screenshot shows a dialog window titled "Account Information" with a close button (X) in the top right corner. The form contains the following fields:

- \* First Name: John
- Middle Initial: Q
- \* Last Name: Public
- \* Email: JPublic@example.com
- \* Login: JPublic
- Phone: 123 456 - 7891 ext. 9999
- Cell: 123 456 - 7892
- Fax: 123 456 - 7893
- \* Department: Programs & Services (dropdown menu)
- Position: Intake Clerk (dropdown menu)

Buttons: "Save" and "Cancel" at the bottom right.

Fig. sa4

Click on the **Save** button to save your changes or the **Cancel** button to cancel editing the account.

You can select the security information for the new account. Under the Account Information block, you will see the following **Security Information** block.

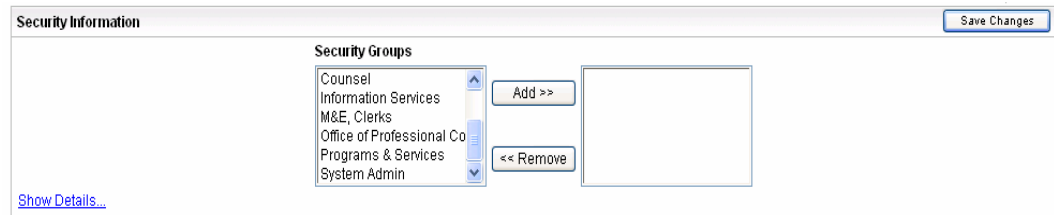


Fig. sa5

The following section discusses security information.

### *Select Security Information*

You can assign a person to a pre-established security group, by selecting that group from the **Security Groups** list on the left, then clicking on the **Add** button.

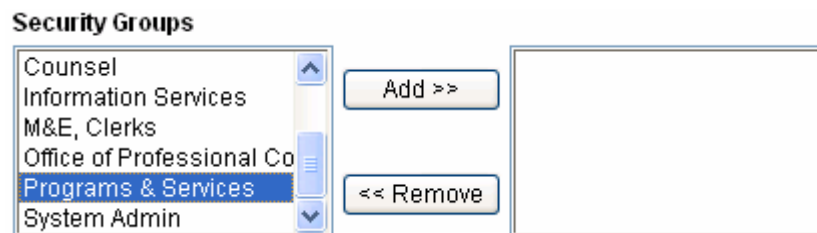


Fig. sa6

The selected Security Group will now appear in the list on the right.

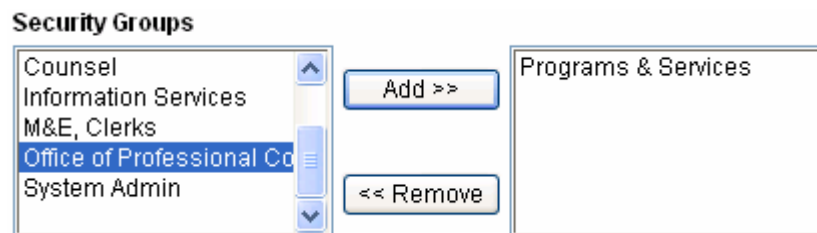


Fig. sa7

Click on the **Save Changes** button to save the Security Group selection for this member.

If you are unsure what the security allowances are for the Security Group you have chosen to assign, click on the **Show Details** link.

## SYSTEM ADMINISTRATION

---

You will see an expanded listing of the application tabs and their sub-tabs showing what the person in the newly added account has authority to do in those tabs. For example, within the Member Management tab, the security group **Programs & Services** is authorized to find a member, view their profile, but not make changes to it. They can, however, make changes to the member's Associations, Transactions, etc.

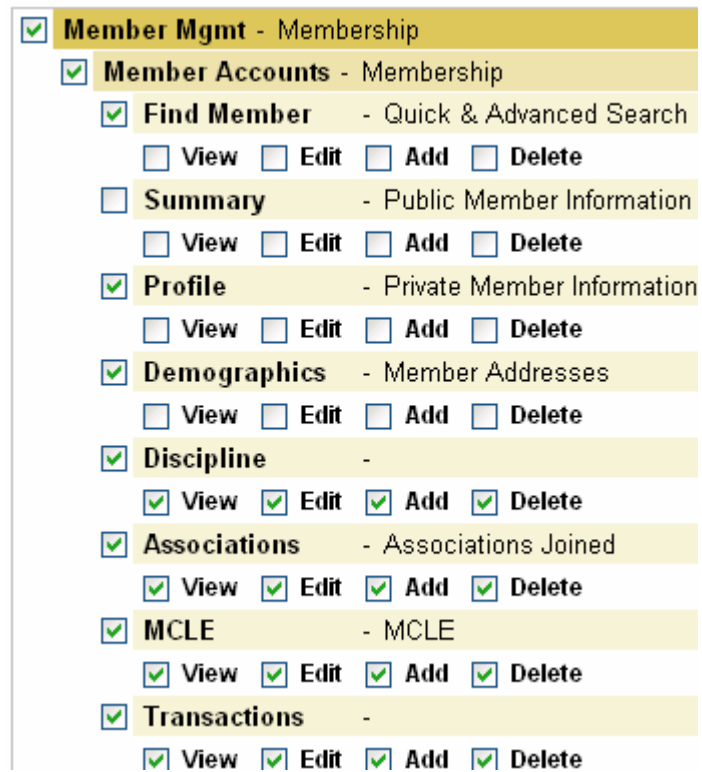


Fig. sa8

If the account you've just added is a member of several security groups, the expanded listing shown will be a combination of the security allowances for those groups.

If you would like the newly added account to have more allowances than what is shown on the expanded listing, simply click on the check boxes next to the allowances you would like to add and click on the **Save Changes** button.

### *Delete Account*

To delete an account, click the Delete button on the same line as the account you want to delete.

*Unlocking an Account*

If a user is locked out of their account because of 5 unsuccessful logon attempts you could see the following indication on the User Accounts page:

<b>Name</b> 	<b>Department</b>	<b>Email</b>	<b>Phone No</b>
<a href="#">1, Kermit (Inactive)</a>	Information Services	director@legalspan.com	(999) 999-
<a href="#">2, Harry.</a>	Admissions	admissions@baralliance.com	(999) 999-
<a href="#">3, Janet.</a>	Information Services	demo@utahbar.org	(999) 999-
<a href="#">Abad, Brenda</a>			

Fig sa9

Click on the name to go to that staff members Account Information page.

Back To List

**Account Information** (Inactive) Reactivate

<b>First Name</b> Kermit	<b>Phone</b> (999) 999-9999
<b>Middle Initial</b>	<b>Cell</b>
<b>Last Name</b> 1	<b>Fax</b> (999) 999-9999
<b>Email</b> director@legalspan.com	<b>Department</b> Information Services
<b>Login</b> bruno	<b>Position</b> Senior Counsel
	<b>Supervisor</b> Montante, Katherine

Fig sa10

Click the Reactivate button and they will be able to login again.

## BAR SETUP

### Demographics

In Demographics, you can establish the demographic information for your particular bar. This information will appear on the BarAlliance Reports and is used as default values for Department, Association and Member demographic additions.

*Name	Utah State Bar
Attn.	
*Street 1	999 South 99 East
*Street 2	
*Zip	84999 - <input type="text"/> <input type="button" value="Search By Zip"/>
City	SALT LAKE CITY
State	UT
Country	USA
*Phone No	999 999 9999
Fax No.	999 999 9999

\* Required

Fig. sa11

After all selections have been made, click on the **Save** button to save your changes.

### Departments

Departments displays the address and contact information for the various departments within your bar. This information is gathered from your input into Demographics, User Accounts and from Departments and Employee Positions in List Maintenance. The address and contact information is inherited from Demographics.

If, for example, the Administration & Finance department is located somewhere other than the bar's main address, you can change the address for this department by clicking on the **Update** button next to Administration & Finance.

<b>Administration &amp; Finance</b> <input type="button" value="Update"/>	
<b>Physical Address</b> 999 South 99 East SALT LAKE CITY, UT 84999	<b>Mailing Address</b> 999 South 99 East SALT LAKE CITY, UT 84999
<b>Supervisor:</b> Frog, mark	
<b>Phone:</b> (123) 456-7890	
<input type="button" value="+"/> <b>Employee List</b>	

Fig. sa12

You will see a dialog window where you can designate not only the physical address of the department, but also a separate mailing address, as well as edit the contact information for the department.


If the mailing address is the same as the physical address, simply click on the **Same As Above** button rather than filling out the same information twice.

The screenshot shows a dialog window titled "Bar Setup" with three main sections:

- Physical Address:** Includes fields for Attn, Street 1 (999 South 99 East), Street 2, Zip (84999), State (UT), City (SALT LAKE CITY), and Country (USA). A "Search By Zip" button is next to the Zip field.
- Mailing Address:** Includes identical fields to the Physical Address section. A "Same As Above" button is located below the Country field.
- Department Information:** Includes fields for Title (Administration & Finance), Supervisor (Frog, mark), Phone No. (123 456 7890), Fax No., E-mail, and URL.

At the bottom, there is a "Save" button, a "Cancel" button, and a red asterisk indicating required fields.

Fig. sa13

If you have the street address but are not sure of the city, state or zip code, fill in the information you do have and click on the  to search for the remaining information.

For example, if you know that the department is in Salt Lake City, you could just type 'Salt Lake City' into the text box next to City and click on the magnifying glass icon.

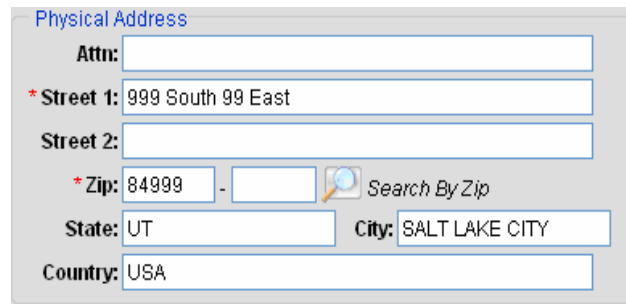
This close-up screenshot shows the "Physical Address" section of the dialog window. The "City" field is filled with "SALT LAKE CITY". The "Search By Zip" button, represented by a magnifying glass icon, is highlighted, indicating it is the focus of the instruction.

Fig. sa14

## SYSTEM ADMINISTRATION

---

The application will then check the database for 'Salt Lake City' in Utah and automatically fill in the remaining fields.



Physical Address

Attn:

\* Street 1: 999 South 99 East

Street 2:

\* Zip: 84999 -

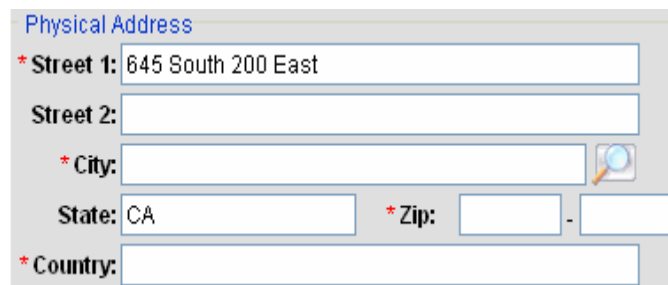
State: UT City: SALT LAKE CITY

Country: USA

Fig. sa15

The same applies if you only enter the state, but not the city or the zip code.

Type the two letter abbreviation for the state in the text box next to State, in this case use 'CA'. Click on the magnifying glass icon.



Physical Address

\* Street 1: 645 South 200 East

Street 2:

\* City:

State: CA \* Zip:  -

\* Country:

Fig. sa16

You will see a dialog window giving you a choice of cities in the database that are in the state of Utah along with the remaining required information of zip code and country.

Click on 'Salt Lake City', then the **Select** button. The address fields will be filled in automatically.



Address Search

We could not find an exact match to your entry, please select from the list:

City	State	Zip	Country
Bakersfield	CA	84330	US
Beverly Hills	CA	84308	US
Boulder	CO	84716	US
Boulder	CO	84719	US
Concord	CA	84521	US
Eureka	CA	84628	US
Fountain Valley	CA	92708	US
Gunnison	CO	84634	US

[Not in List?...](#)

Fig. sa17

If for some reason the information you want is not in the list pulled from the database, you can enter it by clicking on the **Not In List?** link.

You will see a dialog window displayed that asks for Country, State, City and Zip information. Once this information is entered, it will be stored in the database for future reference.

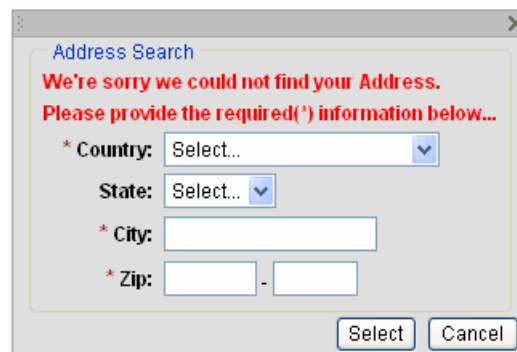
A screenshot of a dialog box titled "Address Search". The dialog box has a close button (X) in the top right corner. The text inside reads: "We're sorry we could not find your Address. Please provide the required (\*) information below...". Below this text are four input fields: "\* Country:" with a dropdown menu showing "Select.."; "State:" with a dropdown menu showing "Select.."; "\* City:" with a text input field; and "\* Zip:" with two text input fields separated by a hyphen. At the bottom right of the dialog box are two buttons: "Select" and "Cancel".

Fig. sa18

After all selections have been made, click on the **Save** button to save your changes.

### ***Rules Matrix***

In Rules Matrix, you can establish the pricing for the various associations within your bar, select the positions in those associations; designate the CLE requirement rules, define the types of members the CLE requirements apply to; choose which associations will be free to new members; associate status with member types and establish renewal fees.

### ***Associations***

To establish the pricing rules for associations, click on the link for **Associations**, then click on the type of the association you want to assign prices for.



Fig. sa19

For example, if you wanted to assign prices for the various associations within your bar, click the **+** next to the name **Associations**.

## SYSTEM ADMINISTRATION

Then click on the **+** next to the name of the association whose pricing guidelines you want to establish. For example, if you wanted to establish the prices for the Minority Bar, click on the **+** next to the name **Minority Bar**.

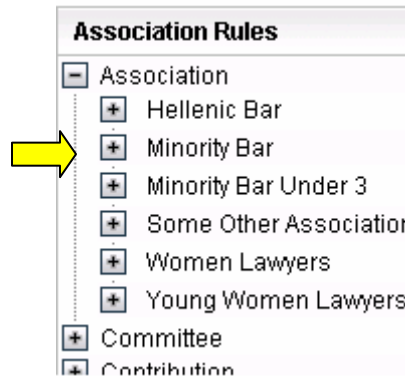


Fig. sa20

First, you should establish an overall fee, then assign specific fees for the various member types and statuses if they are different than the overall fee.

To establish the overall fee, click on the **Edit** button next to 'Overall.'

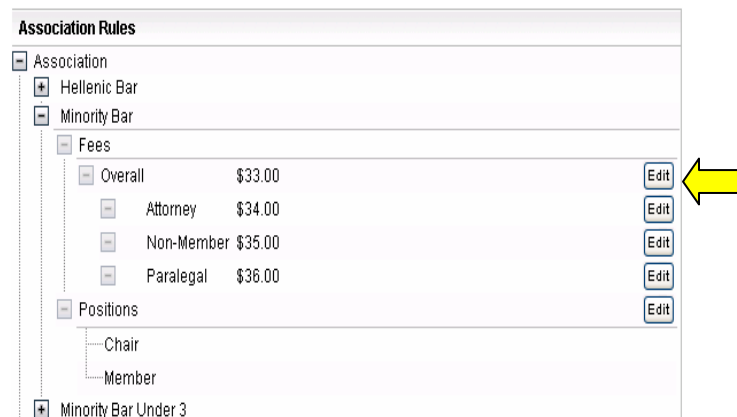


Fig. sa21

If you would like your overall fee to be \$33.00, type that amount into the text box next to **Fee**.

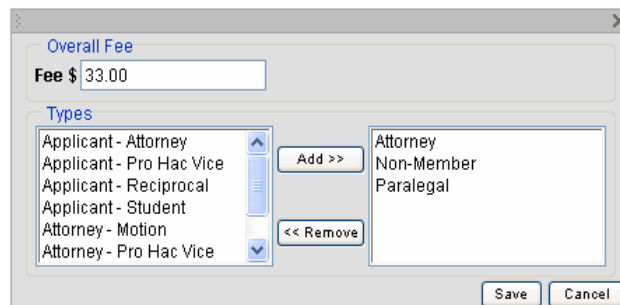


Fig. sa22

Next, select the Member Type this fee applies to. To add the type ‘Journal Subscriber’ to the list of types of members within your bar, highlight **Journal Subscriber**. Click on the **Add** button. You will see that the type named **Journal Subscriber** has been added to the list on the right.

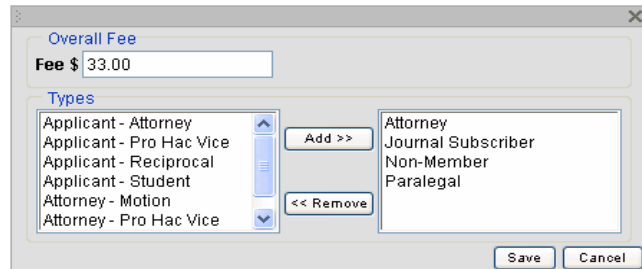


Fig. sa23

After all selections have been made, click on the **Save** button to save your changes. The new type **Journal Subscriber** will automatically be charged the Overall fee, unless you specifically assign a new fee.

Minority Bar	
Fees	
Overall	\$33.00
Attorney	\$34.00
Journal Subscriber	\$33.00
Non-Member	\$35.00
Paralegal	\$36.00

Fig. sa24

To assign a new fee for the **Journal Subscriber** type, click on the **Edit** button.

Minority Bar		
Fees		
Overall	\$33.00	Edit
Attorney	\$34.00	Edit
Journal Subscriber	\$33.00	Edit
Non-Member	\$35.00	Edit
Paralegal	\$36.00	Edit

Fig. sa25

If you would like the fee for Journal Subscriber to be \$30.00, type that amount into the text box next to **Fee**.

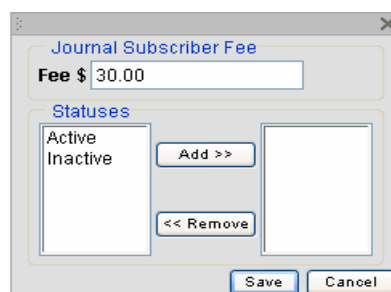


Fig. sa26

## SYSTEM ADMINISTRATION

You can also designate statuses for each member type that the new fee applies to. If no statuses are defined, the fee will apply to all statuses for that Member Type.

To add the 'Active' status, select the status **Active**. Then click on the **Add** button to add the status of 'Active' to the Journal Subscribers type. The status 'Active' will then appear the column on the right



Fig. sa27

After all selections have been made, click on the **Save** button to save your changes. You will see that there is now a status of Active beneath Journal Subscribers.

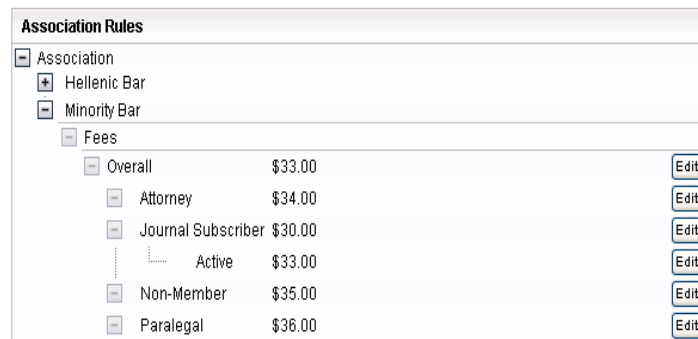


Fig. sa28

Note that the fee for the Active Journal Subscriber is automatically charged the Overall bar fee. If you would like to change the fee, click on the **Edit** button next to Active.



Fig. sa29

If you would like the fee for the Active Journal Subscriber to be \$30.00, type that amount into the text box next to **Fee**.

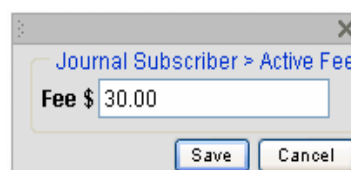


Fig. sa30

After all selections have been made, click on the **Save** button to save your changes.

You can also establish which Association positions are available within your bar. To add a position, click on the **Edit** button next to Positions.

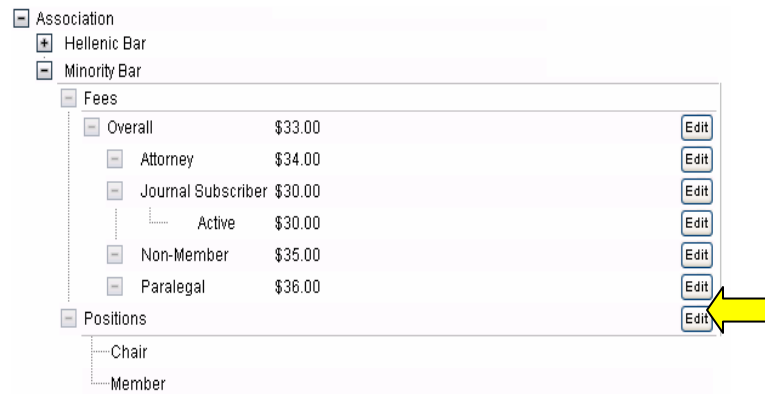


Fig. sa31

For example, to add a Co-Chair, select Co-Chair and click on the **Add** button.

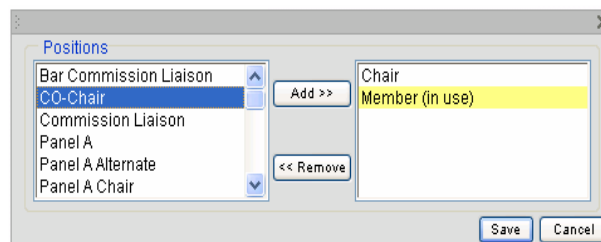


Fig. sa32

Co-Chair will appear in the box on the right. Click on the **Save** button to save your changes.

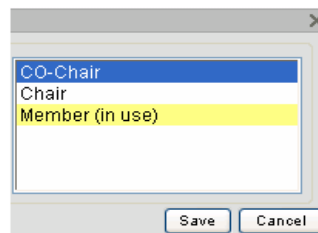


Fig. sa33

You will see that there is now a position of Co-Chair beneath Positions.

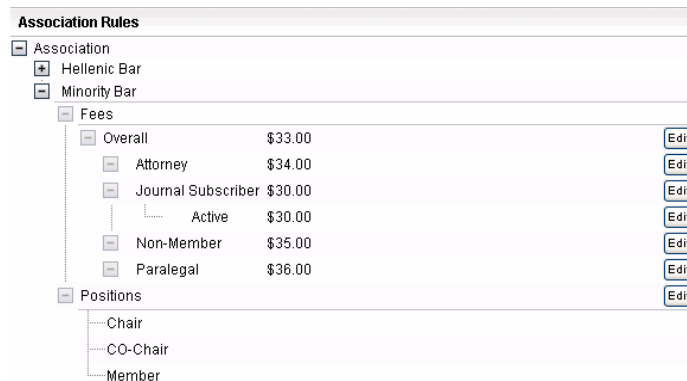


Fig. sa34

## *Free Associations*

To assign free (no charge) associations to new members, click on **Free Associations**.



Fig. sa35

For example, if you wanted to assign Constitutional Law as a free association for all new members of the type Attorney, click on the **+** next to **Attorney**.

You will see that within the member type Attorney, there are different statuses. Click on the **+** next to the status you want.



Fig. sa36

Next, click on the **Edit** button next to the status type. For this example, choose the status **Active**.

You will see a dialog listing the associations. Select the association you want, then click on the **Add** button.

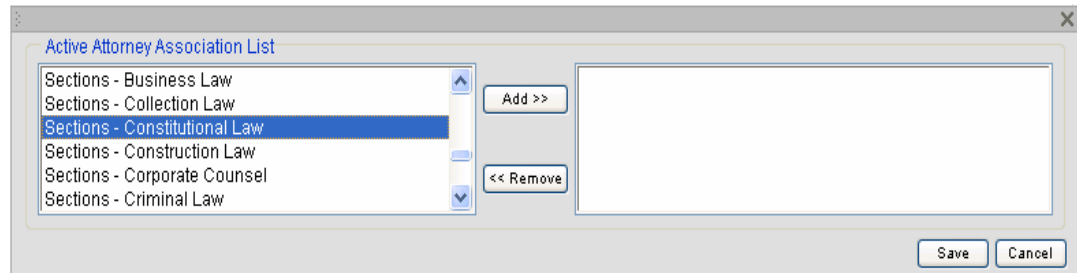


Fig. sa37

After all selections have been made, click on the **Save** button to save your changes.

To view the free associations for the **Active** status of the member type **Attorney**, click on the **+** next to **Active**.

You will see that Constitutional Law is now listed under the Active status of the member type Attorney.



Fig. sa38

### ***MCLE Rules***

To establish, add or remove rules for CLE requirements, click on the link for **MCLE Rules**.

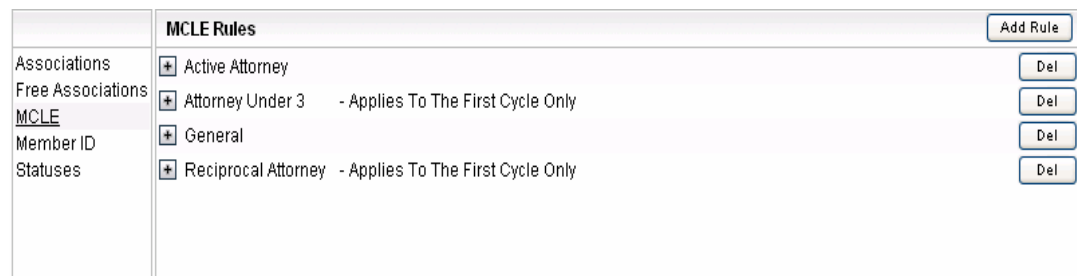


Fig. sa39

To add a CLE rule, click on the **Add Rule** button.

## SYSTEM ADMINISTRATION

You will see a popup that you can enter the name of the rule and whether or not it applies only to the First CLE Cycle. If the rule only applies to the First Cycle, click on the checkbox (square).

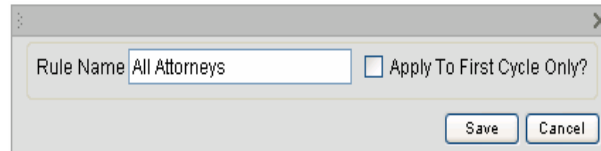


Fig. sa40

After all selections have been made, click on the **Save** button to save your changes. You will now see the new rule appear in the list of rules.



Fig. sa41

Click on the **+** next to the new rule to edit its requirements.



Fig. sa42

To edit the Credit Type, click on the **Edit** button. You will see a dialog window listing the rule criteria. Click on the **Add** button

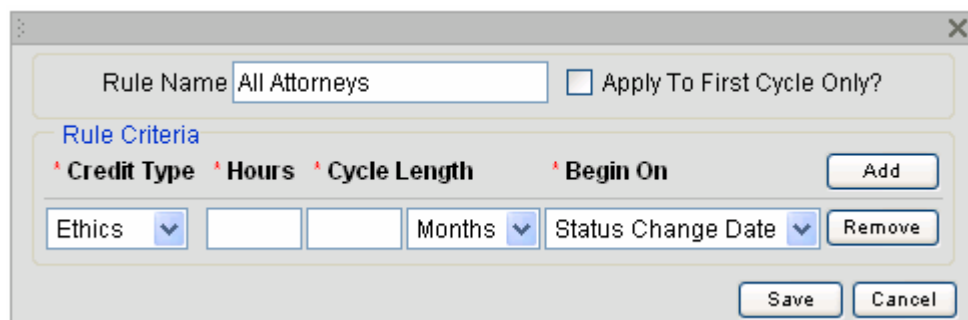


Fig. sa43.

You can designate the credit type, the number of hours required, the length of the cycle and when it begins. For example, if you wanted to designate an Ethics credit requirement that required 5 hours every three years beginning on the attorneys' admission date, select **Ethics** from the dropdown list, enter the number **5** under Hours, enter the number **3** in the text box under Cycle Length, then select **Years** from the dropdown list and finally, select **Admission Date** from the dropdown list under Begin On.

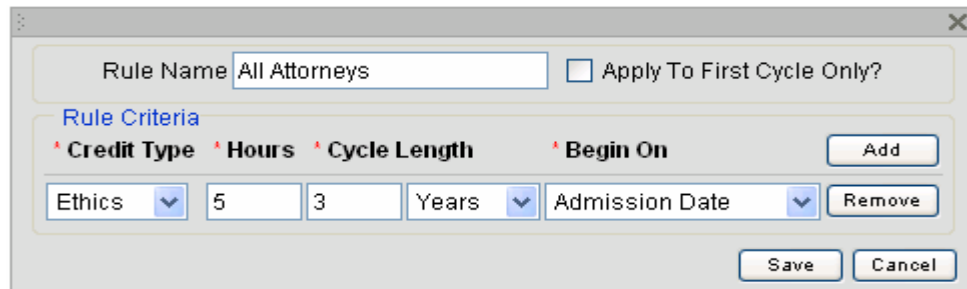


Fig. sa44

After all selections have been made, click on the **Save** button to save your changes.

Your changes will be reflected on the next screen.



Fig. sa45

Notice that you can also designate the Member Types and Statuses this rule applies to. To designate the Member Type and Status, click on the **Edit** button.

Highlight the types and statuses you want this rule to apply to and click the **Add** button.

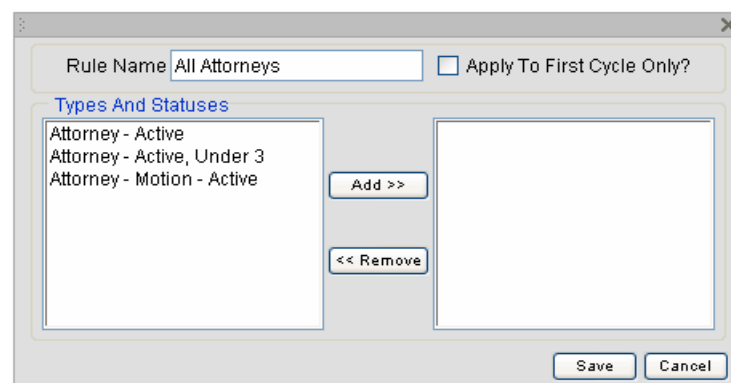


Fig. sa46

## SYSTEM ADMINISTRATION

---

After all selections have been made, click on the **Save** button to save your changes. Your changes will be reflected on the next screen.

<input type="checkbox"/> All Attorneys					<input type="button" value="Del"/>
<input type="checkbox"/> Credit Type	Hours	Cycle Length	Begin On		<input type="button" value="Edit"/>
<input type="checkbox"/> Ethics	5	3 Years	Admission Date		
<input type="checkbox"/> Type	Status				<input type="button" value="Edit"/>
Attorney	Active				
Attorney	Active, Under 3				

Fig. sa47

You may edit the rules at any time by clicking on the **Edit** button next to that rule.

### *Member ID*

This allows you to select the starting numbers for any new member ID's based on member type.

Member ID Rules	
Applicant - Attorney	<input type="text" value="0"/>
Applicant - Pro Hac Vice	<input type="text" value="0"/>
Applicant - Reciprocal	<input type="text" value="0"/>
Applicant - Student	<input type="text" value="0"/>
Assoc Section Member	<input type="text" value="0"/>
Attorney	<input type="text" value="0"/>
Attorney - Foreign Consult	<input type="text" value="0"/>
Attorney - Motion	<input type="text" value="0"/>
Attorney - Pro Hac Vice	<input type="text" value="0"/>
Attorney - Reciprocal	<input type="text" value="0"/>
Journal Subscriber	<input type="text" value="0"/>
Mailing List Only	<input type="text" value="0"/>
Non-Member	<input type="text" value="0"/>
Paralegal	<input type="text" value="0"/>

Fig. sa48

After all selections have been made, click on the **Save** button to save your changes.

*Statuses*

To establish status rules for your member types, click on the link for **Status**.

- Associations
- Free Associations
- MCLE
- Member ID
- Statuses**

Fig. sa49

As you will see, the **Status Rules** are broken down by member type. To view the status rule for a specific member type, click on the **+** next to that member type. For example, to view the status rule for the member type Attorney, click on the **+** next to **Attorney**.

**Note:** There can be many different status rules per member type.

- Attorney
  - Status**
  - [Active](#)
  - [Active, Emeritus](#)
  - [Active, Under 3](#)
  - [Deceased](#)
  - [Disability](#)
  - [Disbarred](#)
  - [Inactive](#)
  - [Inactive, Emeritus](#)

Fig. sa50

To add or remove statuses, click on the **Edit** button next to the member type.

You will see a dialog window wherein you can add or remove statuses. For this example, we will add the status of Inactive for the member type Attorney.

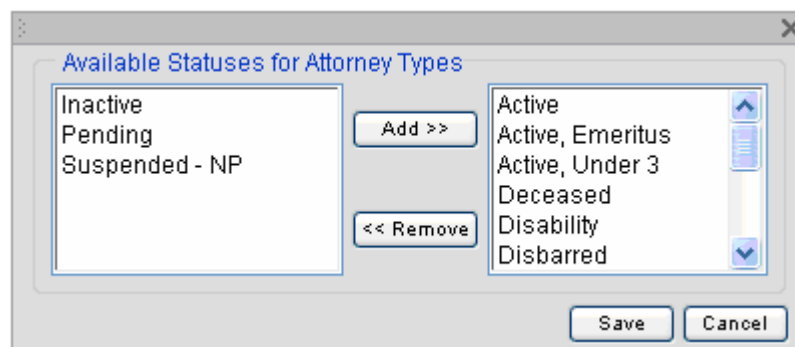


Fig. sa51

## SYSTEM ADMINISTRATION

---

Select the status **Inactive** by clicking on it. Then click on the **Add** button, the status of **Inactive** will then be displayed in the list on the right

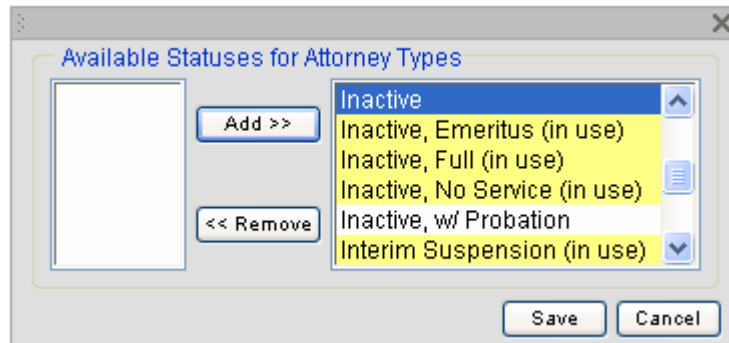


Fig. sa52

Click on the **Save** button to save your changes.

You will see that the status of Inactive now appears in the list of statuses available to the member type Attorney.



Fig. sa53

To define what a status can be changed to, click on the **Edit** button next to that status. For this example, click on the **Edit** button next to **Inactive**.

You will see a dialog window that shows further breakdowns of the **Inactive** status. Let's add that the Inactive status can become Active.

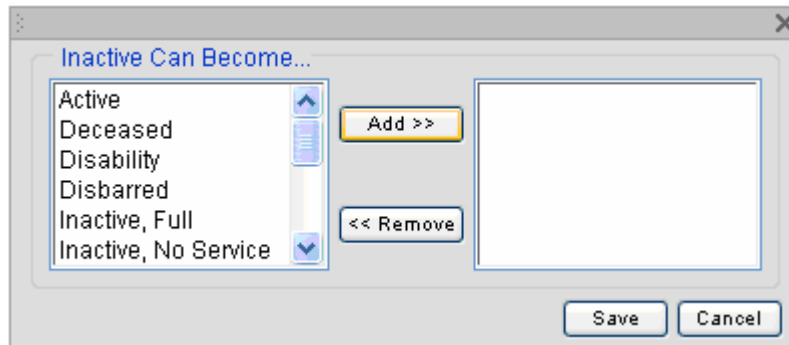


Fig. sa54

Click on the status **Active** in the box on the left to select it. Next, click on the **Add** button, the status **Active**, will appear in the box on the right.

**Note:** You can add more than one status type that Inactive can become.

After all selections have been made, click on the **Save** button to save your changes.

You will now see that the status of Inactive has a **+** next to. Click on the **+** to see what the status rule for Inactive is. You will see that the status of Inactive can now become Active. You can add or delete more status rules by clicking on the **Edit** button and repeating the steps above.



Fig. sa55

In addition to designating what the status may become, you can also assign the renewal fee the member is charged based on their status, whether or not the fee can be prorated if the status change occurs outside the renewal period, if this status is available for the member to select themselves in the member self service module and define any conditions that must be met in order for this status to be selected.

## SYSTEM ADMINISTRATION

---

To designate the renewal fee, click on the status **Inactive**. If you wanted the renewal fee for the status Inactive of the member type Attorney to be \$200.00, enter that amount in the text box next to **Fee**.

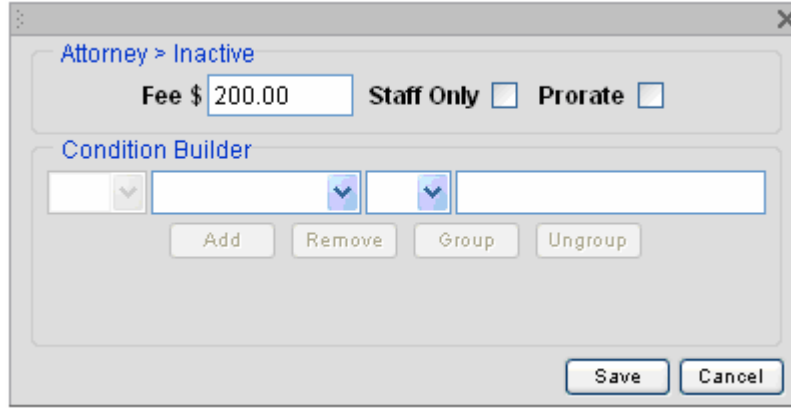


Fig. sa56

If you would like this fee to be able to be prorated, click on the checkbox next to **Prorate**.

To designate that this status can only be changed by the Bar, not the member, click on the checkbox next to **Staff Only**.

Now let's take a look at defining conditions that must be met for a status to be selected. We will use the status **Active, Emeritus**.

For this example, we will set the condition that a member type of Attorney can become **Active, Emeritus** when the attorney turns 65, or the attorney has been admitted to the bar for 30 years.

Click on the status **Active, Emeritus**. Select **DOB** (date of birth) from the dropdown list in the **Condition Builder** section.

Next, choose a parameter of the condition. If the attorney was born on or before July 1, 1940, we would use the greater than or equal to ( $\geq$ ) parameter. Finally, enter the year 1940 into the last text box.

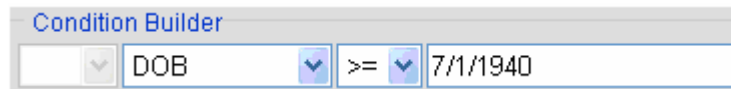


Fig. sa57

Click on the **Add** button.

Notice that the condition now appears at the bottom of the dialog window and the dropdown list on the left side has become active. This is what you use to add more conditions.

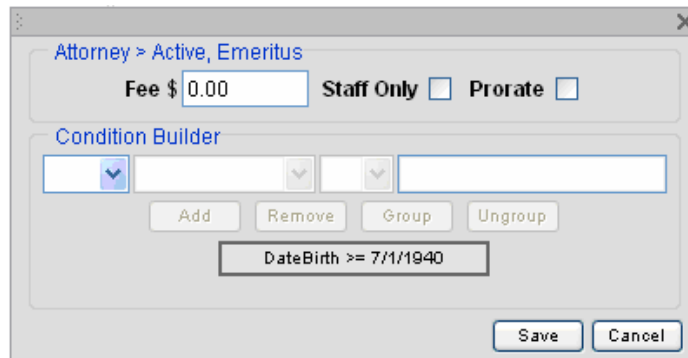


Fig. sa58

Click on **Or** in the dropdown list.

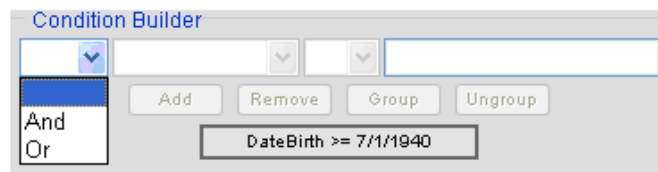


Fig. sa59

Now we're ready to establish the condition if the attorney has been admitted for 30 years. Select **Member Date** from the dropdown list. Next, choose the parameter. In this case, we will use greater than or equal to (>=) again. Finally, enter the year **1970** into the last text box. (Thirty years ago for this example.)

Click on the **Add** button.

Notice that both conditions now appear at and connected with an '**Or**'. These conditions can now be saved, grouped or removed.

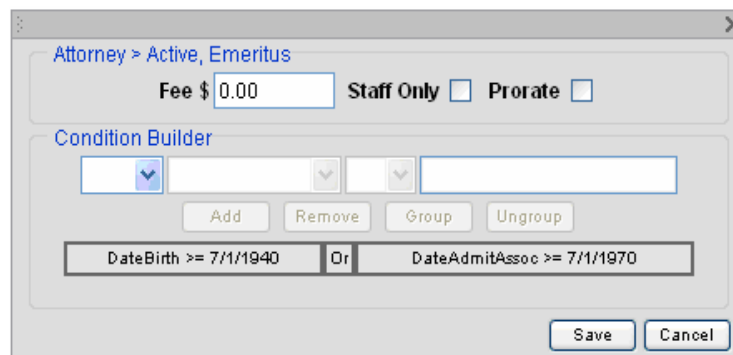
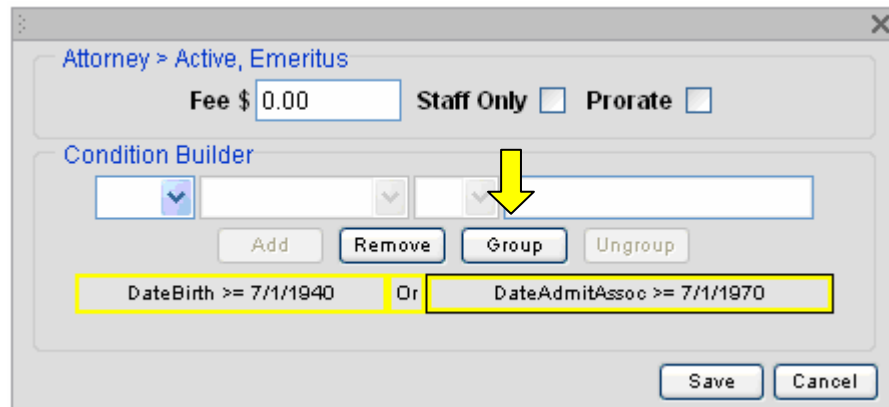


Fig. sa60

To save your selections at this point, click on the **Save** button.

## SYSTEM ADMINISTRATION

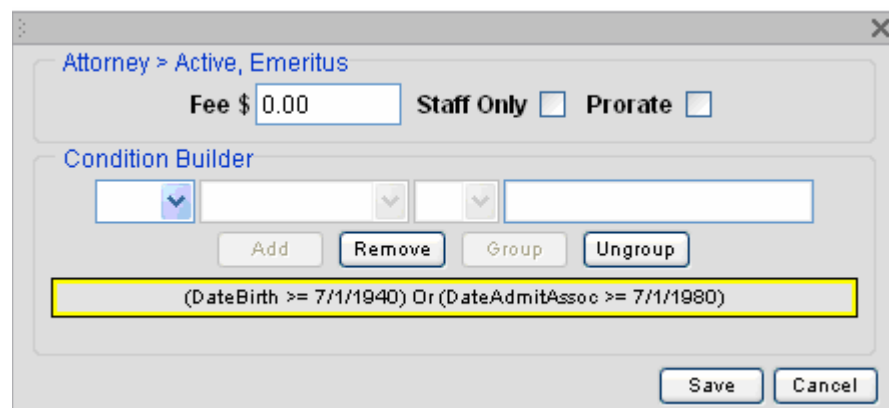
To group the conditions together, click on each condition, then click on the **Group** button.



The screenshot shows a window titled "Attorney > Active, Emeritus". At the top, there is a "Fee \$" field with "0.00" and two checkboxes: "Staff Only" and "Prorate". Below this is the "Condition Builder" section. It features a dropdown menu, two input fields, and a "Group" button highlighted with a yellow arrow. Below the input fields are buttons for "Add", "Remove", "Group", and "Ungroup". The condition list shows two conditions: "DateBirth >= 7/1/1940" and "DateAdmitAssoc >= 7/1/1970", both highlighted in yellow. At the bottom right are "Save" and "Cancel" buttons.

Fig. sa61

The conditions will now appear as a single condition rather than two conditions. You can ungroup them by clicking on the **Ungroup** button or you can remove the condition entirely by clicking on the **Remove** button.



The screenshot shows the same window as Fig. sa61. The "Condition Builder" section now shows a single condition: "(DateBirth >= 7/1/1940) Or (DateAdmitAssoc >= 7/1/1980)", highlighted in yellow. The "Group" button is now disabled, and the "Ungroup" button is active. The "Save" and "Cancel" buttons remain at the bottom right.

Fig. sa62

After all selections have been made, click on the **Save** button to save your changes.

**NOTE:** This condition will have to be updated yearly to remain accurate.

## *Preferences*

In Preferences, you can set the guidelines for your particular business rules. It's up to you whether your members can or cannot change their password, you can designate renewal deadlines, specify if your bar is mandatory or not, hide certain fields and establish CLE compliance dates.

	<input type="button" value="Save"/>
Changeable password?	Yes ▾
Renewal Deadline Month:	6 ▾
Renewal Deadline Day:	30 ▾
Mandatory Bar?	Yes ▾
Hide Completed Social Security Number?	Yes ▾
Hide Completed Race Field?	Yes ▾
CLE Compliance Month:	12 ▾
CLE Compliance Day:	Last ▾

Fig. sa63

### *Changeable password*

To select the option for a changeable password, click on the dropdown list and highlight either **Yes** or **No**.

### *Renewal deadline month*

This is the month in which the renewal deadline is. Renewal periods are one year. Click on the dropdown list and select the month in which the renewal deadline occurs.

For example, if the renewal deadline is June, select the number six.

### *Renewal deadline day*

To set which day of month renewal is due, click on the dropdown list and select the day you want. For example, if renewal is due on the 15<sup>th</sup>, select the number 15.

### *Mandatory bar*

If your bar is a mandatory bar, you can reflect it by selecting **Yes** in the dropdown list.

### *Hide completed social security number*

To hide a member's social security number after it is filled in, highlight **Yes** in the dropdown list. If you would like to display the number to those with security clearance, highlight the word **No**.

### *Hide completed race field*

To hide a member's race information after it is filled in, highlight **Yes** in the dropdown list. If you would like to display the race, highlight the word **No**.

### *CLE compliance month*

To designate the month for CLE compliance, select the month number in the dropdown list. For example, if you would like to designate April, select the number 4 in the dropdown list.

### *CLE compliance day*

To designate the first or the last day of the month for CLE compliance, select **First** or **Last** in the dropdown list.

After all selections have been made, click on the **Save** button to save your changes.

### *Application Tabs*

In **Application Tabs**, you can customize the appearance of the BarAlliance application. From setting the colors to modifying tabs, based on your bar's needs.

The first screen you'll encounter in the Application Tabs section.

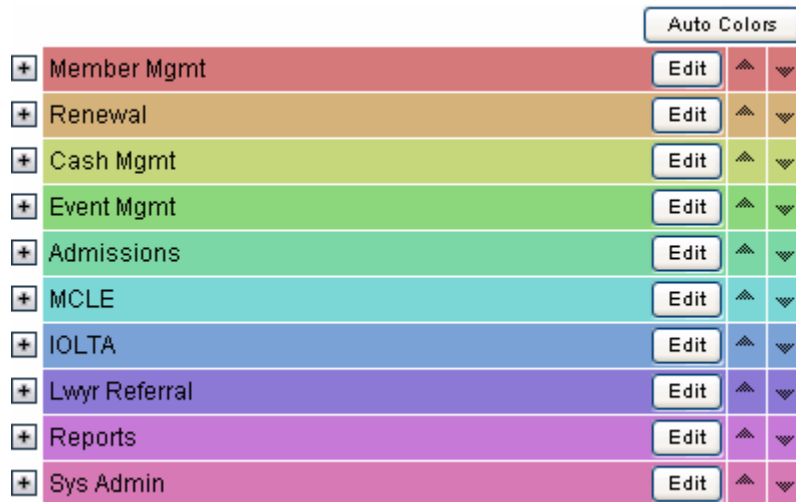


Fig. sa64

On the left side of the screen you will see a **+** next to some of the tab headings, these are the tabs that have sub-tabs within them.

On the top of the screen you can see a button labeled **Auto Colors**. The **Auto Colors** button is to return the application back to the default color scheme.

Below that, you can see a button labeled **Edit**. The **Edit** button is to edit the main tab's information.

To the right of the **Edit** button, you will see arrows that point up and down. These can be used to rearrange the order of the tabs by moving them up or down.

First, let's look at the **Member Mgmt** tab. Click on the **+** next to **Member Mgmt**.

You will now see the menu items or sub-tabs within the **Member Mgmt** tab. To edit the **Member Management** tab, click on the **Edit** button next to **Member Mgmt**.

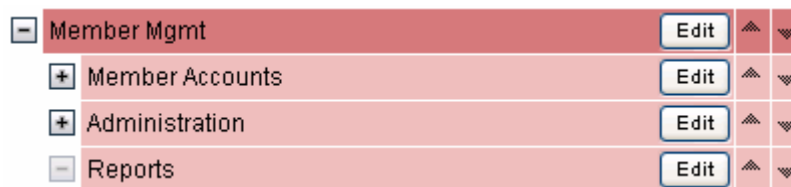
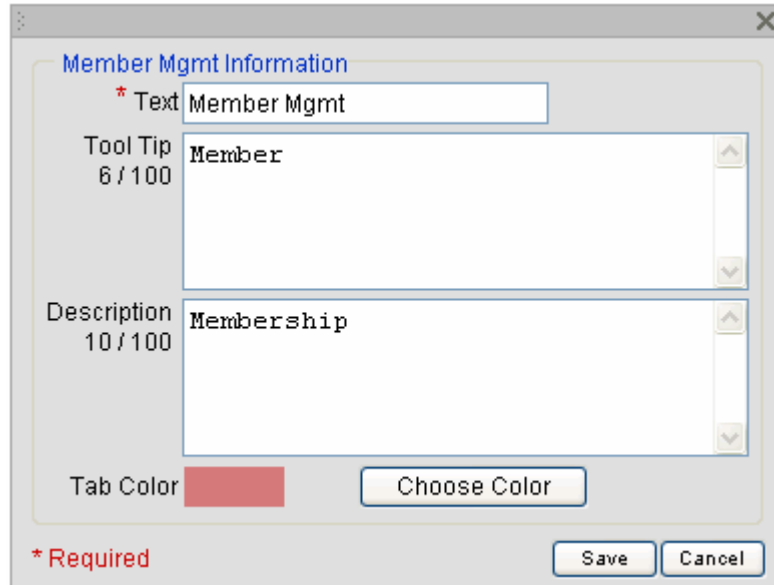


Fig. sa65

## SYSTEM ADMINISTRATION

---

You will see a dialog window that prompts you to edit the information for the menu item. If you wanted to change the name of a tab, this is where you would do it.

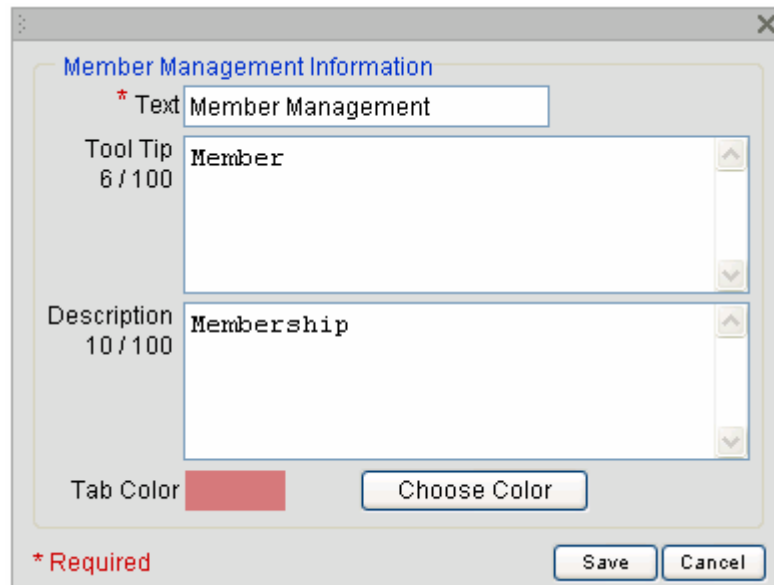


The screenshot shows a dialog box titled "Member Mgmt Information". It contains the following fields and controls:

- \* Text:** A text box containing "Member Mgmt".
- Tool Tip:** A text box containing "Member" with a character count of "6 / 100".
- Description:** A text box containing "Membership" with a character count of "10 / 100".
- Tab Color:** A red color swatch next to the label "Tab Color".
- Choose Color:** A button to select a different color for the tab.
- \* Required:** A red asterisk indicating that the text field is required.
- Save / Cancel:** Two buttons at the bottom right of the dialog.

Fig. sa66

For instance if you wanted the label **Member Mgmt** to be spelled out, edit the name in the **Text** box.

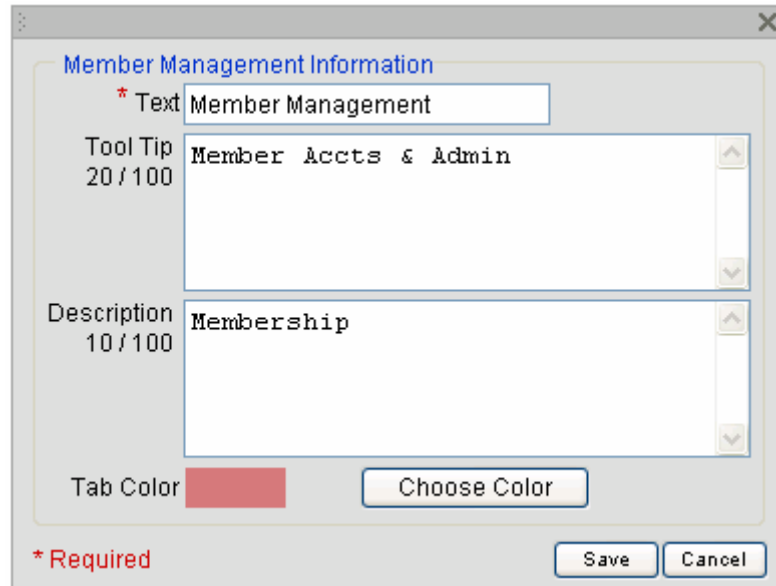


The screenshot shows a dialog box titled "Member Management Information". It contains the following fields and controls:

- \* Text:** A text box containing "Member Management".
- Tool Tip:** A text box containing "Member" with a character count of "6 / 100".
- Description:** A text box containing "Membership" with a character count of "10 / 100".
- Tab Color:** A red color swatch next to the label "Tab Color".
- Choose Color:** A button to select a different color for the tab.
- \* Required:** A red asterisk indicating that the text field is required.
- Save / Cancel:** Two buttons at the bottom right of the dialog.

Fig. sa67

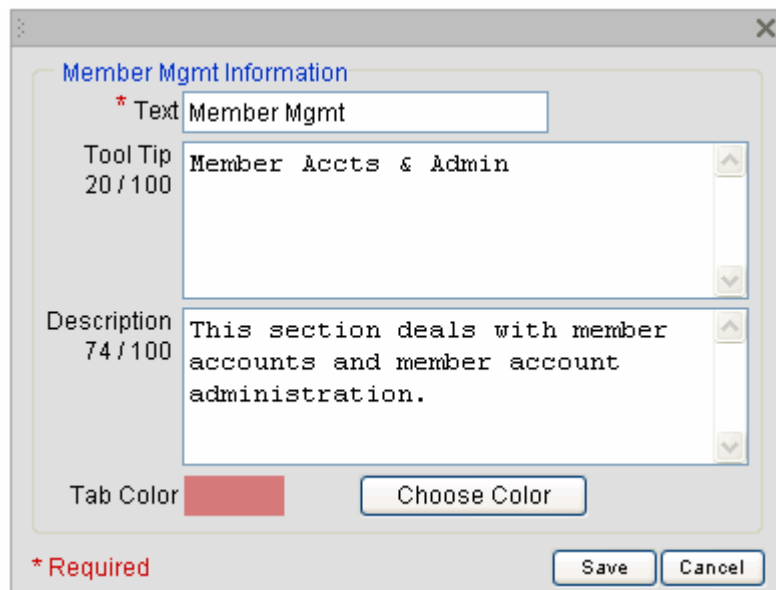
While you're here, you may want to edit the **Tool Tip**, the text that shows up when your mouse cursor hovers over the tab for Member Management. To edit the **Tool Tip**, simply change the text in the text box next to **Tool Tip**.



The screenshot shows a dialog box titled "Member Management Information". It contains several fields: a required text field for "Text" with the value "Member Management"; a "Tool Tip" field with a value of "Member Accts & Admin" and a character count of "20 / 100"; a "Description" field with a value of "Membership" and a character count of "10 / 100"; and a "Tab Color" field with a red color swatch and a "Choose Color" button. At the bottom, there are "Save" and "Cancel" buttons and a red asterisk indicating required fields.

Fig. sa68

You can also include a description. Just type one in in the text box next to **Description**.



The screenshot shows the same dialog box as Fig. sa68, but with the "Description" field filled with the text "This section deals with member accounts and member account administration." The character count for the description is now "74 / 100". All other fields and buttons remain the same.

Fig. sa69

If you'd prefer not to use the default colors, you can change them by clicking on the **Choose Color** button.

## SYSTEM ADMINISTRATION

There are several ways to choose the color you want to use. One way is to click on any spot on the large box of color on the left side of the window. Another is to click on any spot on the vertical rainbow bar in the middle of the window.

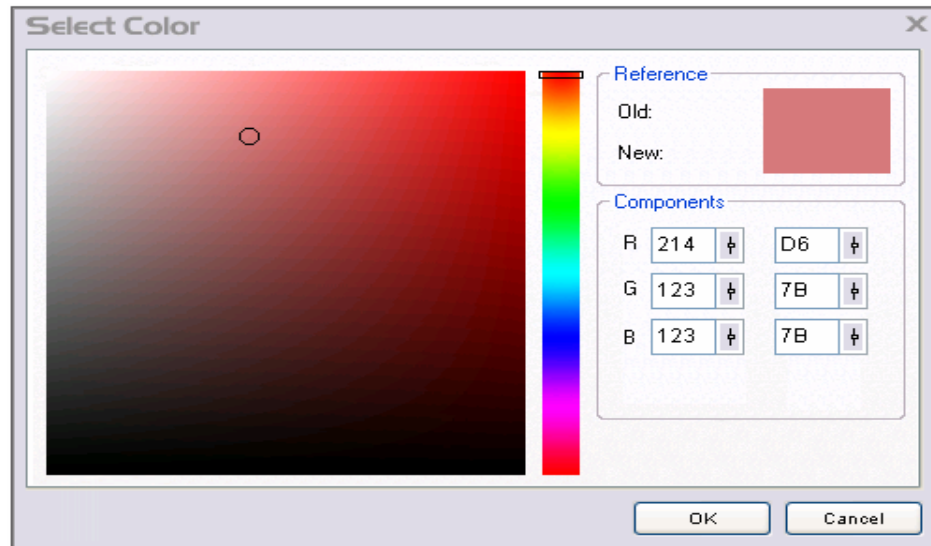


Fig. sa70

Or, if you happen to know the exact red, green and blue values you want to use, you can simply type them into the **Components** area on the lower right side of the screen.

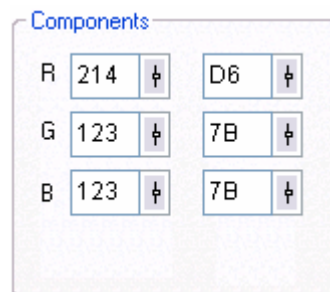
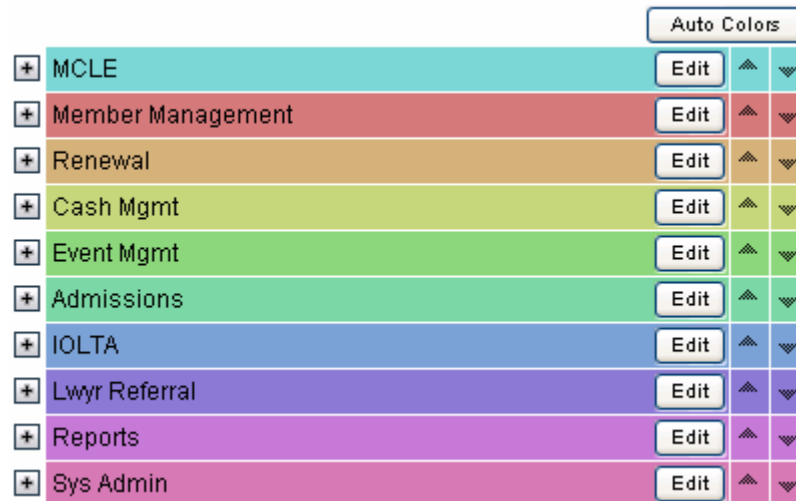


Fig. sa71

After all selections have been made, click on the **Save** button to save your changes.

These same steps can be used for each of the sub-tab or menu items. If you decide that you would like to revert back to the default colors, click on the **Auto Colors** button.

Perhaps you would like to change the order in which the tabs appear. For example, if you wanted **MCLE** to be the first tab on the application. Click on the up arrow next to **MCLE** until **MCLE** is the first in the list.



		Auto Colors		
+ MCLE	Edit		▲	▼
+ Member Management	Edit		▲	▼
+ Renewal	Edit		▲	▼
+ Cash Mgmt	Edit		▲	▼
+ Event Mgmt	Edit		▲	▼
+ Admissions	Edit		▲	▼
+ IOLTA	Edit		▲	▼
+ Lwyr Referral	Edit		▲	▼
+ Reports	Edit		▲	▼
+ Sys Admin	Edit		▲	▼

Fig. sa72

### ***CONFIRM CHANGES***

Record changes submitted by Bar Staff or Members are placed in the Confirm Changes utility when the 'Database Access' feature in the individual's security account in System Administration, Security Groups or User Accounts has been turned off. Confirm Changes allows data changes to be reviewed and then committed to the database by the System Administrator or someone specifically designated to authorize changes.

For example, if changes were to be made by someone without the security clearance necessary for such changes, the person would receive a notification that the changes are pending confirmation.

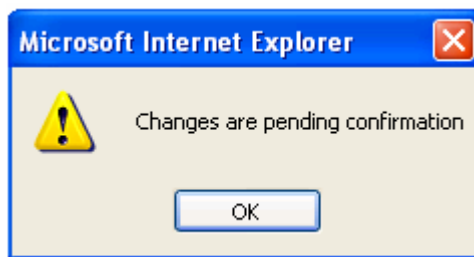


Fig. sa73

### ***Module Names***

The names of the modules are listed on the left side of the screen. Click on the one you want to select.

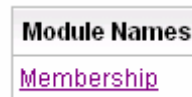


Fig. sa74

You will then see changes waiting to be confirmed and any confirmation history for that module.

Module Names	Membership Change Requests						Save		
Membership	Confirm?	Request By	Request Date	Request For	Data (Label: Old ? New)				
	<input type="checkbox"/> Yes <input type="checkbox"/> No	Tester	1/20/2005	00003	Title :	→ Mrs			
					First :	Emily → Emily			
					Middle :	→			
					Last :	Watson → Smith			
<b>Membership History</b>									
	<a href="#">Confirm</a>	<a href="#">Date</a>	<a href="#">Confirmed</a>	<a href="#">Decision</a>	<a href="#">By</a>	<a href="#">Request By</a>	<a href="#">Request Date</a>	<a href="#">Request For</a>	<a href="#">Data (Label: Old → New)</a>
	1/20/2005	Yes	Tester	Tester	1/20/2005	00009	Title :	→ Ofcr	

Fig. sa75

## Change Requests

In this section, you will be asked to confirm changes. You will also be informed who made the request, what day it was made, which account number it applies to, as well as what the change is.

Membership Change Requests						Save
Confirm?	Request By	Request Date	Request For	Data (Label: Old ? New)		

Fig. sa76

To confirm or deny the change, click in either the **Yes** or **No** checkbox. For this example, we will accept the change.

To see who requested the change, look under the **Request By** column. In this case, the request was made by Tester.

To see what day the request was made, look under the **Request Date** column. In this case, the request was made on January 20<sup>th</sup>, 2005.

To see whom the request was made for, look under the **Request For** column. In this case, the request was made for account number 00003.

## SYSTEM ADMINISTRATION

And finally, to see just what exactly was changed, look under the **Data** column. On the far left side you will see what the fields are labeled, then what the old data was and what the newly requested changed data is.

In this case, it appears that Emily Wattson has gotten married and changed her last name. Notice that previously, there was no Title. The Title of Mrs. has been added. Also, the last name has been changed from Wattson to Smith.

### Data (Label: Old ? New)

Title	:		→	Mrs
First	:	Emily	→	Emily
Middle	:		→	
Last	:	Wattson	→	Smith

Fig. sa77

After reviewing this request and clicking on the **Yes** checkbox, click on the **Save** button to allow and save the changes.

### History

This section allows you to view all the changes requested in this module, the date of confirmation, whether or not it was accepted, who made the decision to accept or not, who requested the change, which account number it was for and finally what the actual change was.

Membership History						
<u>Confirm Date</u>	<u>Confirmed</u>	<u>Decision By</u>	<u>Request By</u>	<u>Request Date</u>	<u>Request For</u>	<u>Data (Label: Old → New)</u>
1/20/2005	No	Tester	Tester	1/20/2005	00002	Type : Non-Member → Attorney Status : Inactive → Active Effective : 12/14/2004 → 1/20/2005
1/20/2005	No	Tester	Tester	1/20/2005	00005	Type : Journal Subscriber → Journal Subscriber Status : Active → Inactive Effective : 12/14/2004 → 1/20/2005
1/20/2005	Yes	Tester	Tester	1/20/2005	00003	Title : → Mrs First : Emily → Emily Middle : → Last : Wattson → Smith

Fig. sa78

***FIELD LABELS***

Field Labels allows you to customize the field labels throughout the BarAlliance application.

***Module Names***

The names of the modules are listed on the left side of the screen. Click on the one you want to select.

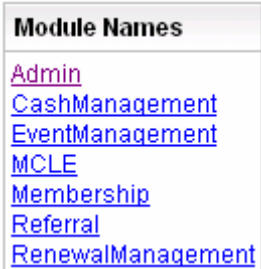


Fig. sa79

You will then see a screen listing all the fields and their labels within that module that you can customize.

A screenshot of the "Admin Labels" configuration screen. On the left, a "Module Names" sidebar lists "Admin", "CashManagement", and "Membership". The main area is titled "Admin Labels" and includes a "Set Default" link and a "Save" button. It contains a table with the following columns: "Column", "(Default)", "Custom", "Single", and "All".

Column	(Default)	Custom	Single	All
Address0	(Attn.):	Attn.	<input type="checkbox"/>	<input type="checkbox"/>
Address1	(Street 1):	Street 1	<input type="checkbox"/>	<input type="checkbox"/>
Address2	(Street 2):	Street 2	<input type="checkbox"/>	<input type="checkbox"/>
CellNum	(Cell No):	Cell No	<input type="checkbox"/>	<input type="checkbox"/>
CityID	(City):	City	<input type="checkbox"/>	<input type="checkbox"/>
CountryID	(Country):	Country	<input type="checkbox"/>	<input type="checkbox"/>
CreditTypeID	(Credit Type):	Credit Type	<input type="checkbox"/>	<input type="checkbox"/>
Cycle	(Cycle Length):	Cycle Length	<input type="checkbox"/>	<input type="checkbox"/>

Fig. sa80

## Labels

To change the labels, simply type in the new label name into the appropriate textbox. For example, if you'd rather **Attn** be spelled out, delete the abbreviation **Attn** from the textbox and type in **Attention**.

Column	(Default)	Custom	Single	All
Address0	(Attn.):	Attention	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address1	(Street 1):	Street 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address2	(Street 2):	Street 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Fig. sa81

When you make a change, the checkbox for **Single** is automatically checked. This means that the change will only occur within that module.

If you'd like the change to take place throughout the entire application, check the box for **All**.

If at any time you want to revert back to the default labels, click on the **Set Default** link.

Click on the **Save** button to save the changes.

You will receive the following dialog:

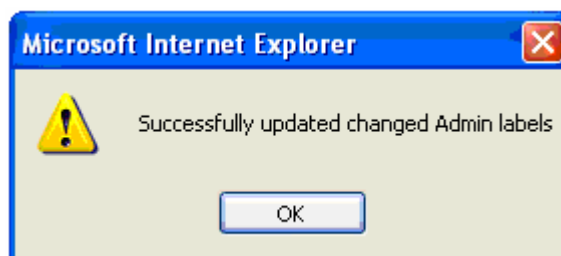


Fig. sa82

Click the **OK** button.

## *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 consistency 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. sa83

### *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.

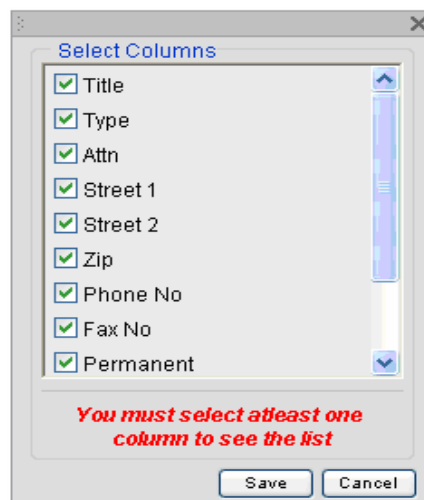


Fig. sa84

## *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.

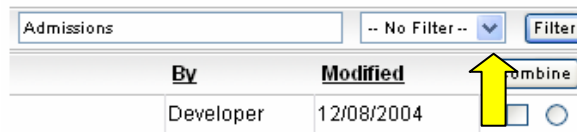


Fig. sa85

## *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.

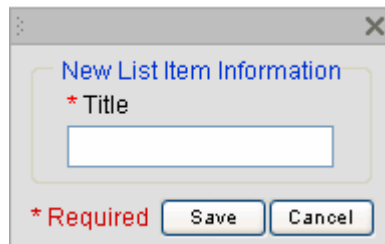


Fig. sa83

## *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.

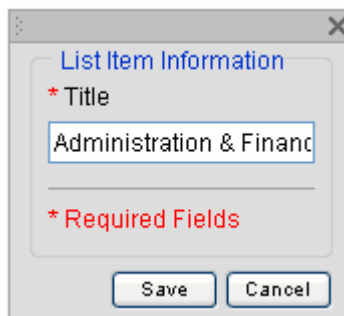


Fig. sa86

## 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.

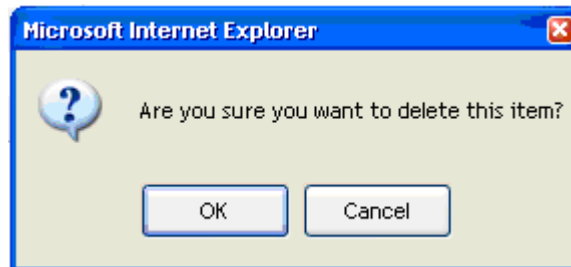


Fig. sa87

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.

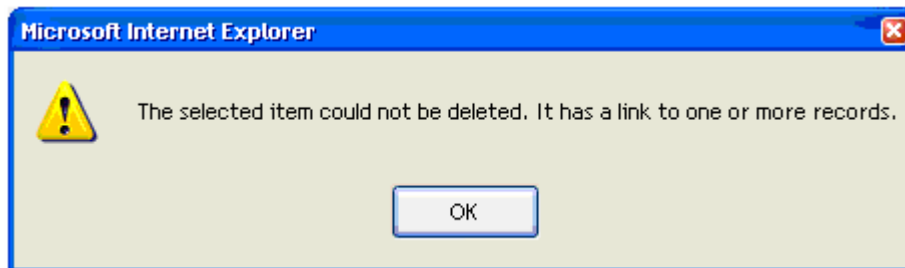


Fig. sa88

## 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.

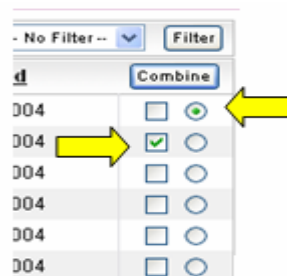


Fig. sa89

## SYSTEM ADMINISTRATION

---

Click on 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.

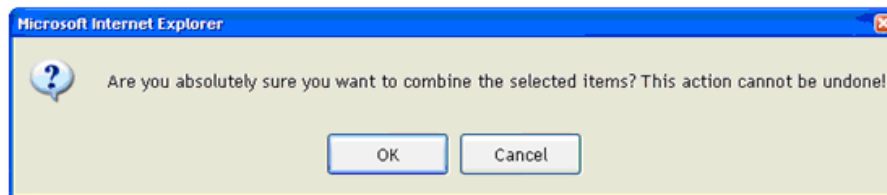


Fig. sa90

### *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.

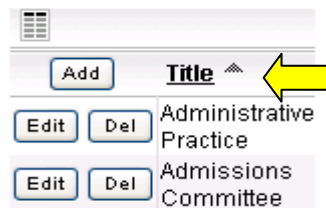


Fig. sa91

## SECURITY GROUPS

With Security Groups, you can allow or deny specific security allowances per groups, i.e. ‘Paralegals.’ You can also set up default security groups for each of your departments. When you add a new team member to that department, you will only have to select the department security group and can add any additional setting by editing that person’s account.

### Add New Group

To add/create a new group, click on the **New Group** button.

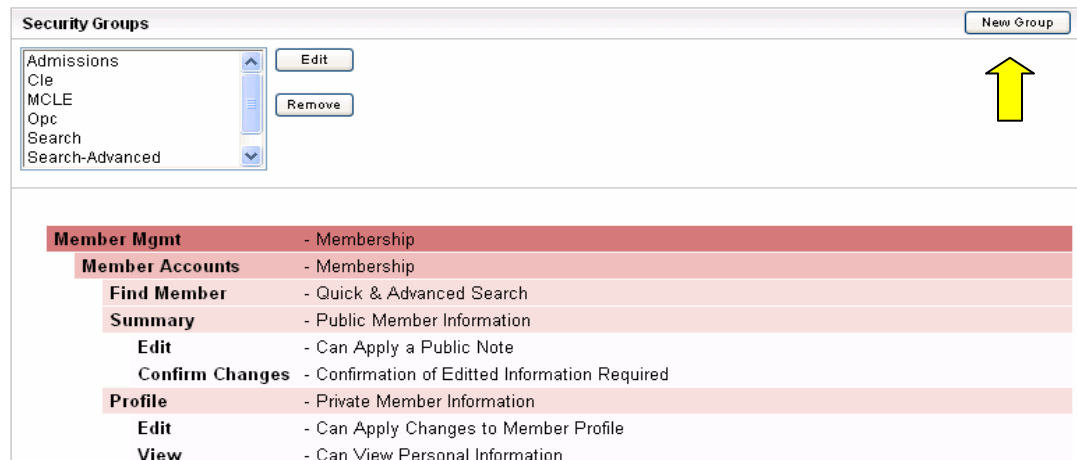


Fig. sa92

Enter the name of the new group into the textbox.

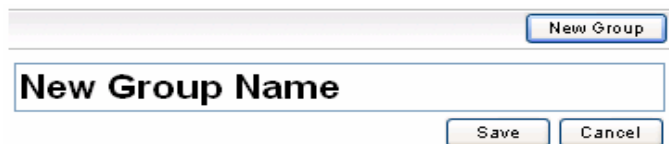


Fig. sa93

Make security selections for new group by checking or unchecking the boxes next the feature you want to allow or deny.



Fig. sa94

Click on the **Save** button.

## *Edit Group*

Select the group you want to edit security access for by clicking on the group name. Click on the **Edit** button.

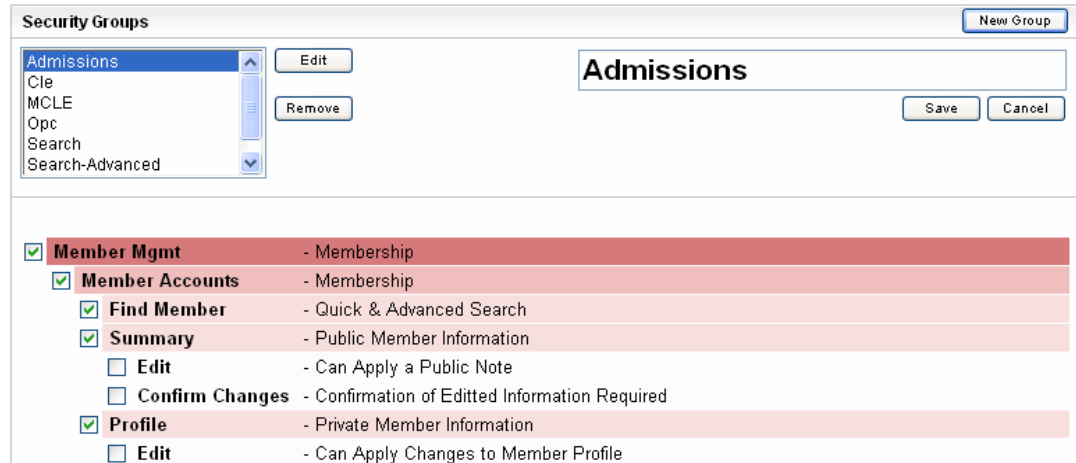


Fig. sa95

Add or remove security allowances by checking or unchecking the boxes next the feature you want to allow or deny.



Fig. sa96

## *Remove Group*

Select the group you want to remove by clicking on the group name. Click on the **Remove** button.

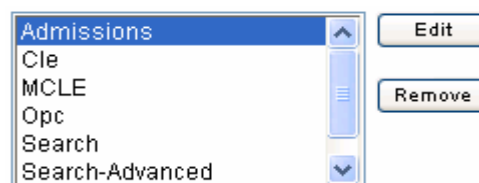


Fig. sa97

A dialog will ask you to verify that you want to delete this group. Click on the **OK** button to delete the record or the **Cancel** button to exit without deleting the group.

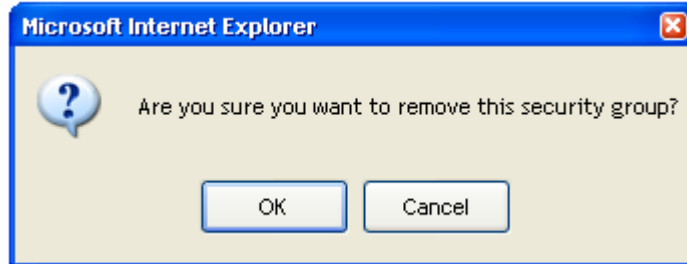


Fig. sa98

## *Login / Pass*

To help maintain the security of the system we have included the following:

- After 5 attempts logging in the user is locked out of their account and must contact the administrator at the bar to [unlock](#) their account
- User ID is maintained in cookies/sessions using dual private key encryption to ensure security
- The user is identified to the system during their session using a different means than password – login
- The cookie/session becomes useless if the duration expires or if the user logs out of the system.

## *Setup*

Some of the security settings that you can apply to your staff are:

- Automatically logging off staff when their programs have been idle for from 1 to 8 hours
- Require a suffix for their password
- Require a minimum number of characters in the password
- Require Upper Case letter(s)
- Require Lower Case letter(s)
- Require Number(s)
- Require Special Character(s)

Number of hours of inactivity before users are automatically logged out	<input type="text" value="4"/>
Suffix appended to all new and changed logins	@ <input type="text"/>
Minimum password length	<input type="text" value="5"/>
Minimum <b>upper case</b> characters in passwords	<input type="text" value="1"/>
Minimum <b>lower case</b> characters in passwords	<input type="text" value="1"/>
Minimum <b>numerical</b> characters in passwords	<input type="text" value="1"/>
Minimum <b>special</b> characters in passwords	<input type="text" value="0"/>
<input type="button" value="Save"/>	

Fig sa99