Getting Started

FilePro National Resource Centre
Suite 10, Level 2
2 Queensgate Drive
CANNING VALE WA 6155

Mailing Address:
PO Box 5311
CANNING VALE SOUTH WA 6155

Tel: (08) 6363 5418
Tel: 1800 049 790
Email: support@filepro.com.au
Web: www.filepro.com.au

Contents

Overview

This course is designed to provide users with the basic knowledge needed to use and maintain files in FilePro.

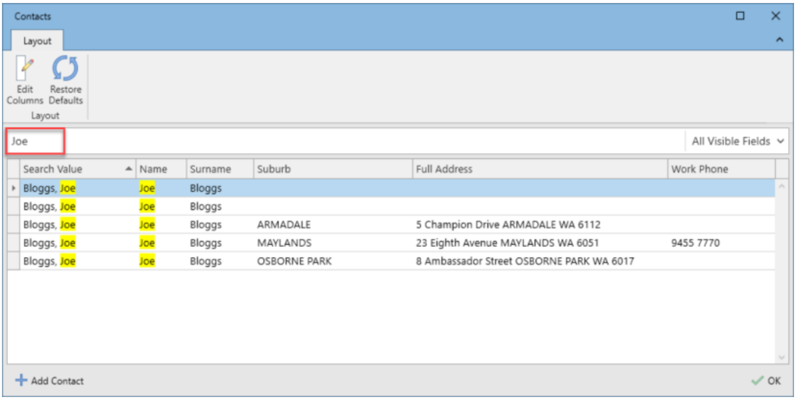
On completion of this course you will be able to:

- Navigate the file screen
- Open and maintain a file
- Open and maintain a contact
- Add, edit and delete a time sheet entry
- Use the time sheet manager
- Use the time clock
- Add a disbursement journal through a file
- Add, edit, delete and manage appointments
- Add, edit, delete and perform a task
- Add, edit, delete and manage documents
- Use the Document Manager
- Save emails to FilePro
- Print an unbilled cost report
- Create an invoice
- Use the Global Search screen
- Open Dashboard
- Archive a file
- Reactivate a file

Contacts

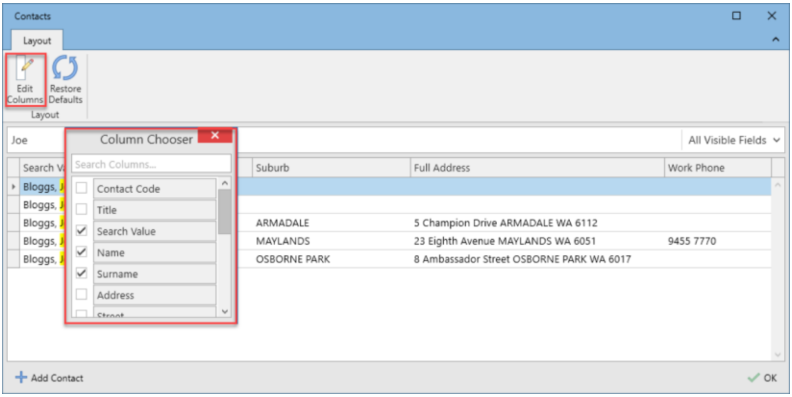
Everyone who is associated with your business should be entered as a contact. This includes your staff, clients, creditors, third parties, potential clients and whoever else you would like to store in the system. You can have as many contacts as you like, so don't hesitate to add a person or entity in at any stage.

Lookup Screen



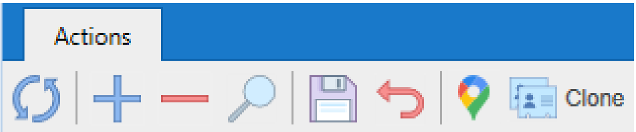
Use the Lookup screen to check if a contact already exists in the database. Just type in the name in the Search field and results will be highlighted. If a contact already exists there is no need to enter them in again. Select that contact and edit details.

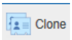
By selecting Edit Columns you will be able to choose which columns appear in the lookup screen.



Actions Ribbon

Use the options on the Actions ribbon to select records, save or cancel changes made to a record and to clone a contact:



- The  will refresh the screen.
- The  allow you add or delete a new record.
- The  will open the Contacts Lookup screen.
- The  will allow you to save or discard changes.
- The  will locate an address via Google Maps
- The 

button allows you to make a direct copy of an existing contact card and change relevant details such as name, email address and telephone number.
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Additional Tabs

- Personal – Personal information relevant to the contact ie: date of birth, phone numbers and email addresses. An image of your contact can be added to the summary section by right clicking and locating on your system.
- Addresses – Street address and mailing address details
- Other – additional fields relevant to the contact. Using the referrer field will give you the ability to produce a Referrer Financial Summary report (from the Files-Reports menu).
- Associations – highlights active/archive files, users, creditors etc that are connected to this contact.
- Note and Memo – useful for storing other notable bits of information ie: Which football team the contact barracks for, name of wife/husband and children.
- Relations – highlights other contacts where you have nominated that this contact is the Master, Referrer or Employer.

- Custom fields – contains up to 20 text fields which may be used for any purpose and the labels on these fields can be renamed using the button on the Actions ribbon.
- Packets – lists all documents contained in the Deeds Register
- Debtor – list invoices that have been created for this contact, across all matters. You can use the two tabs at the top left to switch between all invoices and just the outstanding ones.
- Power Register – displays a list of any instances you have nominated where a user has a power related to this contact.
- VOI – lists all documentation provided for the contact's Verification of Identity. Copies of the documentation can be attached.

Add a Contact

1. On the Contacts menu, click E/M Contacts.
2. Click Add Contact, then fill in the following fields:

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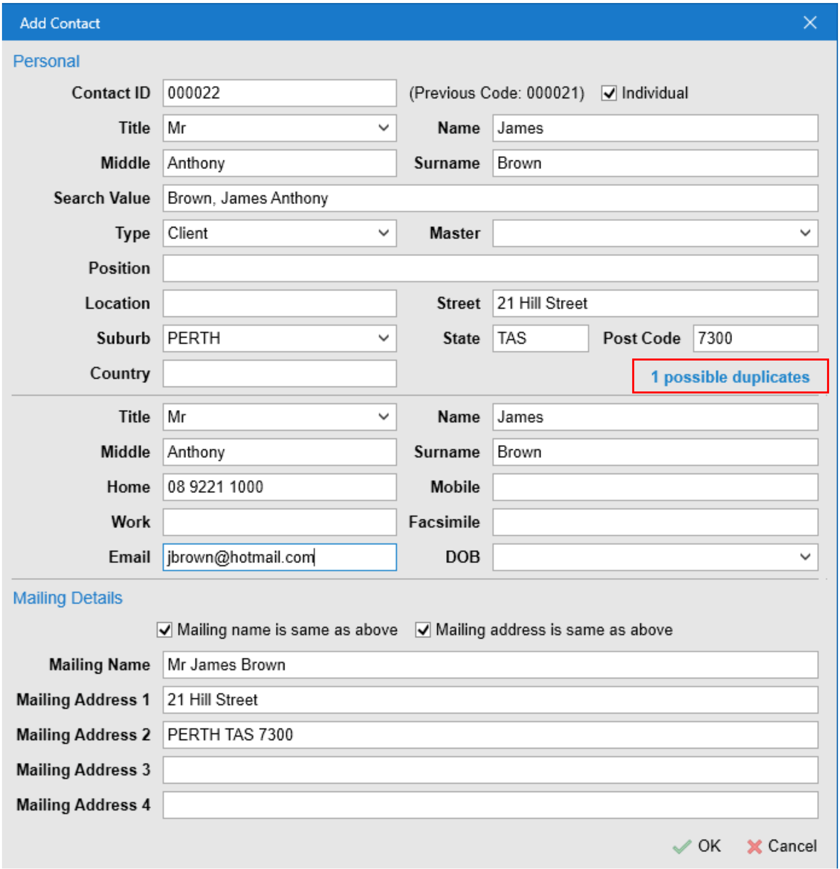

PLEASE NOTE: When adding a new contact there is a checking mechanism that will detect if the person/entity already exists. A blue message will appear as per the screenshot shown above. If you click on this a screen will open highlighting the possible duplicates. You can choose to keep adding a new one or select the one that already exists.

3. If you check the **Individual** box, the **Contact** field is replaced with **Title, First name, Middle Name** and **Surname**.
4. The **Search value** will default to what was entered in **Contact**. If you have checked **Individual**, it will put the surname first, followed by a comma then the first name and middle name. This can be edited.
5. Click **OK**.
6. You can now select the contact you just created and go in to enter further items such as **Occupation, Birth Date**, **Notes,** or **Custom fields.**

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Exercise

Create a new contact using the following information:

After you have created the contact:

- Change the Mailing address to PO Box 789, WEST PERTH WA 6872.
- Add a memo to the contact that their standard report fee is $400.
- Find the contact record for Joe Bloggs and change his address to 23 Eighth Avenue, Maylands.
- Add yourself as a contact.

Files

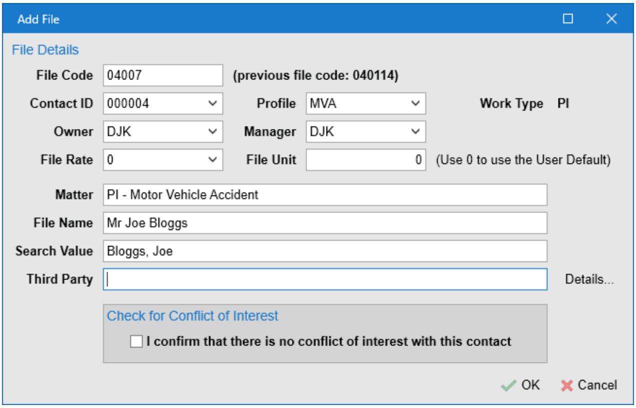
Every matter a fee-earner works on requires a new file to be opened. Each contact can have multiple files associated with them, however you should make sure you don't create a new contact for each file.

File Tabs

- Cover – highlights key information regarding the matter. Can be printed to form part of the physical file. Can be customized on request.
- Detail – provides information about the matter, including contact information for the client.
- Contact – provides information on all third parties attached to the matter, ie: Barrister, Doctor, Other Party, Other Party Solicitor.
- Financial – contains the entire financial history for the file, including Time, Disbursements, Office Costs, Debtors and Trust.
- Appointments – displays appointments that are relevant to the file.
- Tasks– displays tasks that are relevant to the file.
- Documents – allows you to use document templates to quickly create common documents.
- Billing – allows you to determine who receives invoices and reminder notices, either by email or to a physical address for the matter.
- UDF – Custom text fields allowing you to store relevant information relating to the matter that may be required for document templates or reporting purposes.
- Calc – Custom text, date and amount fields allowing you to store relevant information to the matter that may be required for document templates or reporting purposes.
- FamLaw – allows you to enter family law related information pertinent to the matter.
- Probate – allows you to enter details relevant to your wills & estates matters.
- Court – allows you to enter details relevant to your litigious matters.
- Conv – allows you to enter data related to a property conveyance, including automatic calculation of rates & taxes and adjustments, through to production of a settlement statement and eConveyancing.

Opening a new File

1. On the Files menu, click E/M Active Files.
2. Click Add File, then enter the following fields:



3. Enter the new File code.

   This is an alpha-numeric field unique to each file. The previous file code used to open a file is listed in brackets next to this field.

4. Enter the Contact ID, or use the lookup to select an existing contact or add a new one.
5. Enter the Profile, or select from the lookup.
6. Select the file's Owner, Manager and File rate. The Owner is the person who has the day-to-day running of the file. The Manager is the person responsible for the file and defaults to the user who is logged in. If you don't select a file rate, the fee earner's default rate will apply.
7. The Matter will default to the Profile description, but can be edited.
8. The File name will default to the Contact name, but can be edited.
9. The Search Value will default to the Contact name, but can be edited.
10. Enter a Third Party if one exists.
11. Click Details… to see the contact details.

Note: editing the contact details here will only update the personal details on this file. It will not update the mailing or billing details on this file, or the details on any other file. Any changes to the contact must be made through E/M Contacts.

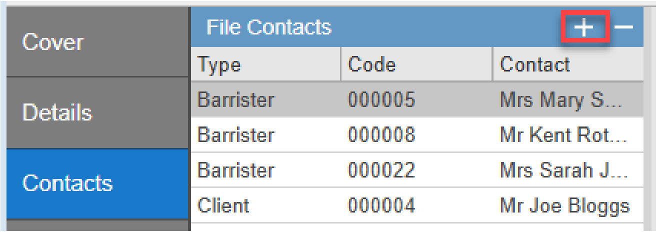
12. Click **OK**.

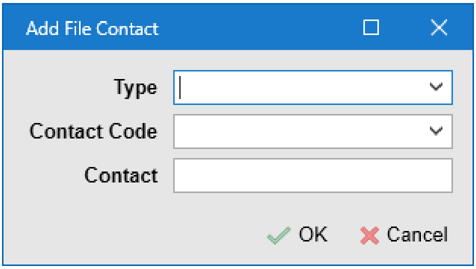
13. You can now select the file you just created and go in to enter further items such as **Cost Agreements, Contacts, Billing options,** or **User defined fields.**

Adding a Contact to a File

1. When the file is opened, click the **Contact** tab in the file screen.

2. Click  on the toolbar.





3. Enter the Type of contact, or use the lookup to select an existing type or to add a new one.

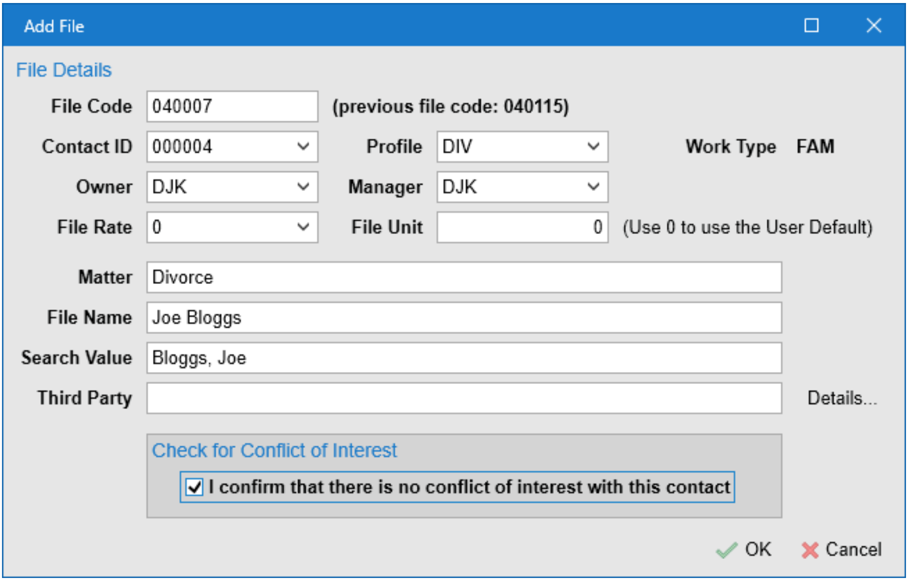
4. Enter the contact Code, or use the lookup to select an existing contact or to add a new one.

5. The Contact name will automatically fill in when you select the contact.

6. Select OK.

Exercise

Create a new file for Joe Bloggs using the following information:



After you have created the file:

- Add Dr Steve Jones as a **contact** for the file.
- Change the contact for the **billing address** to yourself.

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Time

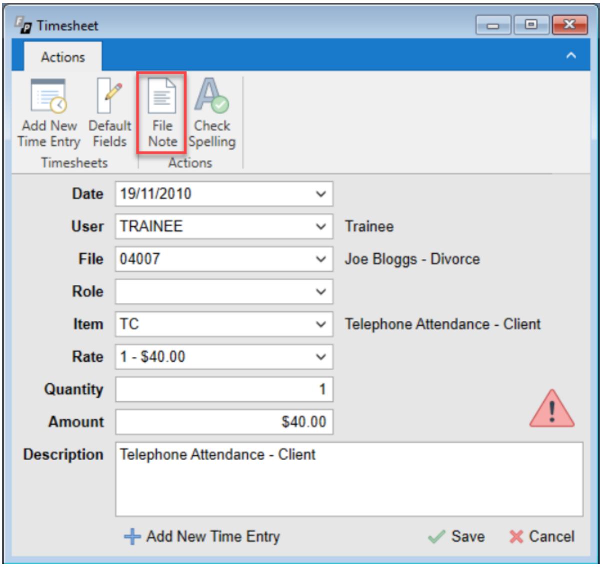
Time is entered onto the system by either timesheet entry, through a time clock, or both.

Timesheet entry allows you to enter your timesheet using a form. While you only see one timesheet at a time, a timesheet manager is available to help you manage your timesheet entries. FilePro automatically posts the transaction to the file and updates all other areas where work in progress figures are maintained.

Timeclock entry is efficient when used by fee earners as it records the exact amount of time spent on a task. Time is posted to the file when the time clock is finalised.

To add a timesheet entry

1. On the Time menu, click Timesheet Entry.



2. The cursor is positioned in the File field. The Date field defaults to today's date and the User field defaults to the user who is logged in. You can change the defaults for new time entries using the Default Fields option in the ribbon.
3. If necessary, change the Date and the User.
4. Type or select the File from the lookup.

5. If necessary, select the Role from the lookup.
6. This is an optional field that can be turned off in User Preferences.
7. In the Item box, type the item ID, or select from the lookup.
8. In the Rate box, type the rate, or select from the lookup.
9. The default rate is set for each user on each file, but you can override this here.
10. In the Quantity box, type the number of time units done. The Amount will automatically calculate, but you can change this.
11. If necessary, select the Budget from the lookup.
12. This is an optional field that can be turned off in User Preferences.
13. In the Description box, type a description of the time entry
14. If you wish to create a File Note for this time sheet, click the document icon that appears in the ribbon.
15. To add another timesheet, click Add New Time Entry, or click Save to save and exit.

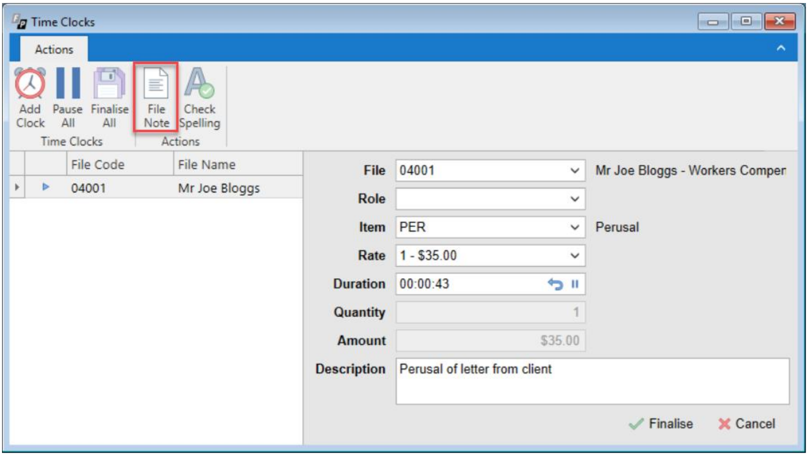
Note: If your timesheets are for a different user and/or date, then set the **Default values for new timesheet** using the **Default fields** in the ribbon.

Keyboard Shortcuts:

- Press **Tab** to go from field to field, **Shift + Tab** takes you the other way.
- Using **F4** or **Alt + ↓** will open the lookup without using the mouse.
- If a field is highlighted, pressing your **End** key will put your cursor at the end of the line.
- If you press Tab to get to the **Add New Time Entry** button, once it is highlighted you can just press your enter key to add a new timesheet.
- You can also press **Ctrl +** to go straight to the **Add New Timesheet** button.
- Click the **Cancel** button to exit without saving. Say Yes to the message that appears asking if you are sure you want to cancel this Timesheet.

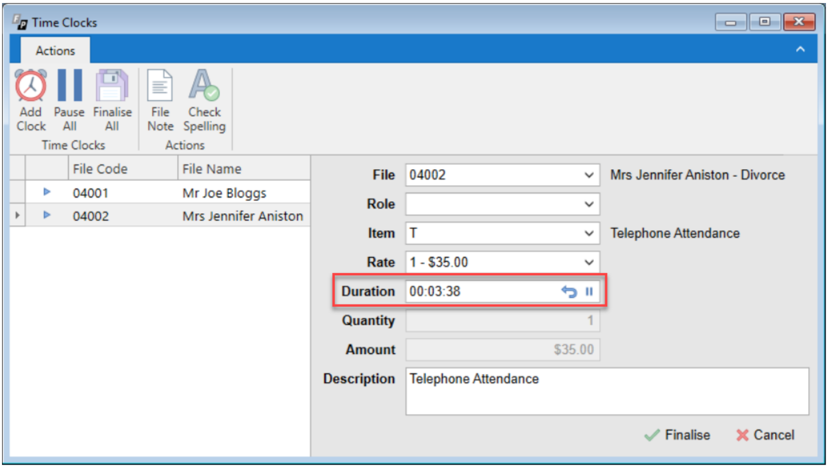
To add a time sheet entry by time clock

1. Click the clock icon on any toolbar.



2. Select **File.**
3. Select Role (if applicable)
4. Select **Time** item.
5. Set **Rate** (will use the default rate on the file)
6. **Qty** and **Amount** will automatically calculate based on the time spent on the task.
7. Enter Description.
8. If you wish to create a **File Note** for this time clock, click the document icon that appears in the ribbon. This will create a file note in Word using information from your time clock entry. This document will be added to your document list.
9. Click **Finalise** to finalise this time clock.

Time Clock Controls



- **Add clock** – allows you to add another clock if you already have one running. Be sure to pause the previous clock.
- **Pause All** – allows you to pause all clocks.
- **Finalise All** – allows you to finalise all clocks.
- **Duration** – advises how many minutes have been spent on this particular entry. The timesheet can be paused from this field if required.

PLEASE NOTE: If adjustments need to be made to the time clock, pause the time clock allowing you access to the Quantity and Amount field. These fields are then able to be edited. This should be completed just prior to finalising the record.

The Time clock is available from various tabs within FilePro; Cover page, Contacts tab, Financial tab, Workflow Tab and Documents tab.

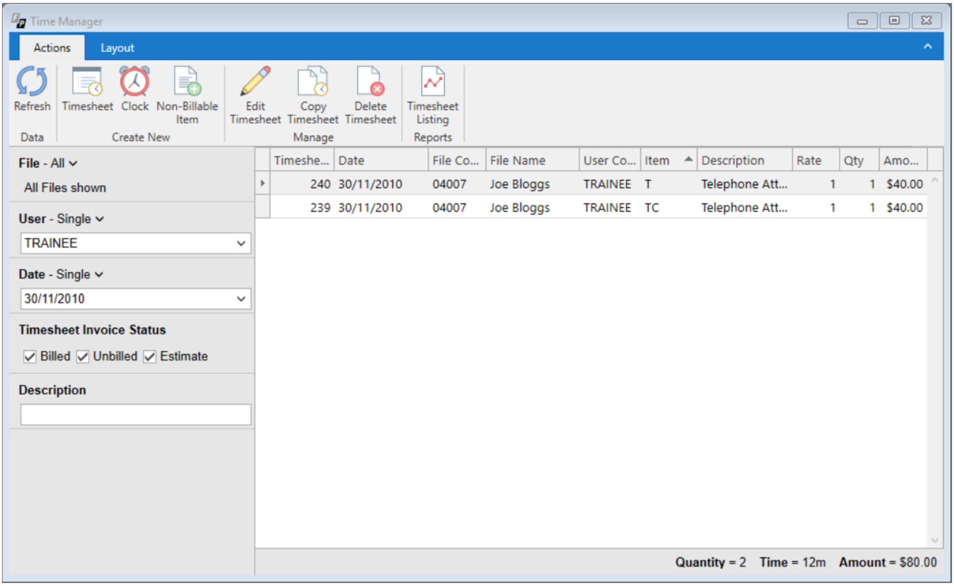
Spellcheck

Spellcheck is available on all time entry screens. Misspelt words will be underscored with a red mark and you are able to right click on the word for suggestions or click on the **Check Spelling** icon in the toolbar ribbon. Make relevant changes and if required add to your dictionary.

Timesheet Manager

The Timesheet manager allows you to add, edit and delete your timesheets. It also lets you customise your view by file code, user code, date range and billed or unbilled timesheets.

To access the Timesheet Manager



1. On the Time menu, click Timesheet Manager.

   The timesheet entries on display will be for the user you are logged in as, for today's date and will cover all files with time entered.

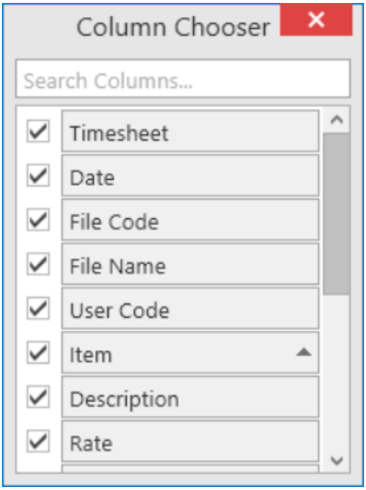
2. Change File to Single using the drop down arrow if you just want to see entries for one particular file code. Enter the file code in the field displayed.

3. Select the User Code to view entries for one fee earner. Use the drop down menu to select All if you wish to see entries for all users.

4. Select the Date range using the Drop down arrow. You can choose from a selection, including Today's date, a Single Date, This week, This month, Year to Date or a date range.

5. If necessary, check the Billed, Unbilled or Estimate box to view specific time entries. The view defaults to display all timesheet entries.

6. Click Layout in the ribbon and Edit Columns to control the column headings.



7. If you don't want to use a column, select the field, and then uncheck the box, then click the x to Close.

To add a new timesheet

1. In the timesheet manager, click **Timesheet or Clock.**
2. Fill out the timesheet or clock as per instructions on page 12 and 14.

To edit a timesheet

1. In the timesheet manager, change the options until the timesheet you wish to edit is on display.
2. Click **Edit Time Sheet** or right click on the entry and select **Edit.**
3. Make your changes, then click **Save.**

To delete a timesheet

1. In the timesheet manager, change the options until the timesheet you wish to delete is on display.
2. Click **Delete Timesheet** or right click and select **Delete.**
3. Click **Yes** to confirm.

To copy a timesheet

1. In the timesheet manager, change the options until the timesheet you wish to delete is on display.
2. Click **Copy timesheet** or right click and select **Make Copy.**
3. Make any necessary changes, then click **Save** to confirm.

Timesheet Listing Report

Selecting the Timesheet Listing report in the Timesheet Manager ribbon will allow you to preview or print a report of the items that are listed in your screen (based on your search parameters).

Exercise

- Enter the following time entries for fee earner DJK for today's date (use the file's default rate):

File Code	Item	Description	Qty
04007	C	Attendance at Local Court	20
04001	PER	Perusal of letter from Dr Tan	1
04003	T	Telephone attendance with Dr Jones	1
04003	T	Telephone attendance with SGIO	5
04007	T	Telephone attendance with Bailiff	2
04001	TC	Telephone attendance - Client	2
04007	TC	Telephone attendance – Client	2

- Add a time clock entry for file 04007 for a telephone attendance with client.

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Disbursements

Disbursement Journals are sometimes known as office costs and are usually entered in bulk. Typical disbursements include photocopying, faxes or courier fees. Disbursement entry is covered in more detail in the bookkeeping course, but entering one off disbursements will be covered here.

To add a disbursement journal

1. Open the file, and then click the Financial tab.
2. Click Office Cost Outstanding or Disbursement Outstanding to add the relevant cost.
3. Click  on the toolbar.

   Note: If you click Disbursement outstanding you will need to select Disbursement Journal from the sub menu first.
4. Select the Disbursement from the lookup and click OK.
5. Enter the Quantity or Amount and click OK.
6. The disbursement journal has been created. Close to exit.

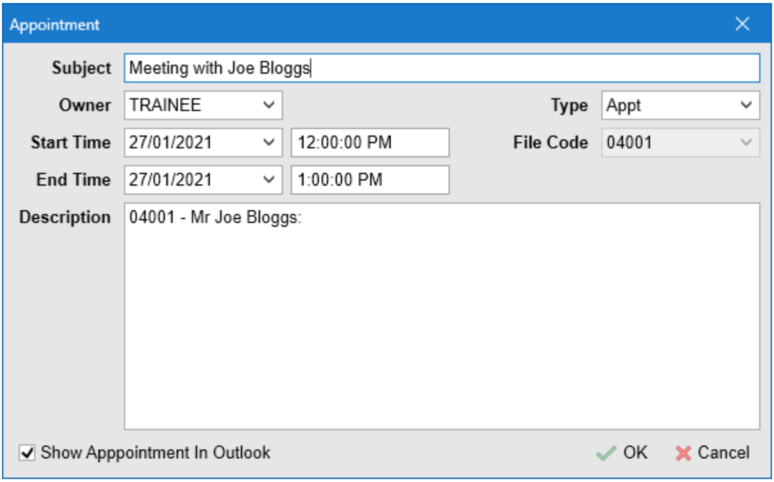
Notes

Appointments

FilePro allows you to keep track of all past and future appointments. Appointments can integrate with Outlook to ensure any changes made are reflected in both Outlook and FilePro.

To create an appointment within FilePro

1. Open the file, and then click the Appointments tab.
2. Click  on the toolbar.



3. Type the Subject of the appointment.
4. Select the Owner from the lookup.
5. Select the Type to Appt.
6. Enter the Start Time and End Time.
7. Enter a Description.
8. If you wish this appointment to appear in Outlook then check the Show Appointment in Outlook box.

   If the owner does not have access to the calendar in Outlook then this option will be dimmed and you will not be able to select it.
9. Click OK.

To create an appointment within Outlook and save to FilePro

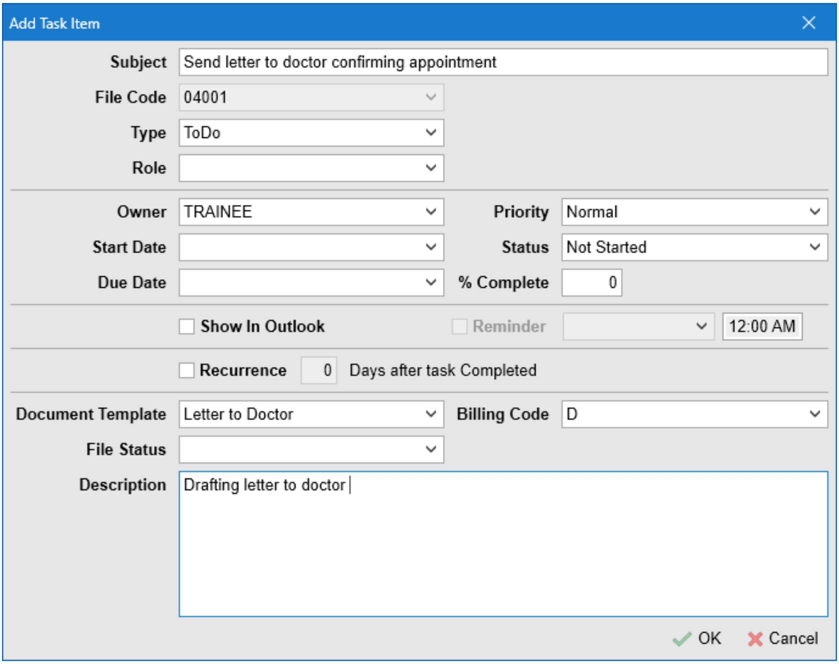
1. Add appointment into your Outlook Calendar as normal.
2. Right click and **‘Save to FilePro’**.
3. Select the relevant file.
4. Open the file in FilePro, navigate to the **Appointments** tab and the appointment will be listed.

Please note: If you change the appointment details in Outlook or in FilePro and click refresh, the appointment details will update in both systems.

To add a task

1. Open the file, and then click the **Tasks** tab.
2. Click  on the toolbar.

3. Select an existing task in the Task Item list or select <New Task>



Enter required fields:

4. Enter **Subject** (task name).

Enter optional fields:

5. Enter Due Date.
6. Check **Show in Outlook** to display this task in Outlook's tasks list.
7. Enter **Role** of person completing task (eg Partner, Secretary, Law Clerk) if using roles.
8. Enter Start Date.
9. If the task has already commenced then select a different **Status** and, if required, indicate the **% Complete**.
10. If the task has a greater or lesser urgency than normal then select a different **Priority**.
11. If you wish this task to recur after it has been completed, then check the **Recurrence** box and enter the **days after task completed** you wish the task to be performed (eg; file review).
12. If you want a document to be created when this task is performed then select the **Document Template**.
13. If you want the time clock to start when this task is performed then select the **Billing Code** and type in a narrative below.
14. Click **OK**.

To perform a task:

1. Open a file, then click the **Tasks** tab.
2. In the **Tasks** window, double-click the task you wish to perform.
3. Click **Yes**, to perform the task.

   Any actions associated with the task, such as writing a letter or time sheet entry will now be performed.

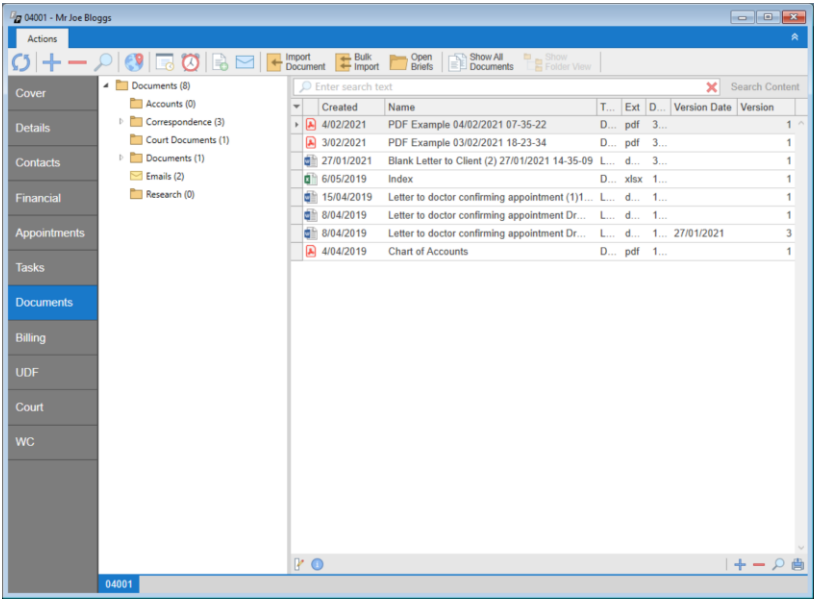
   When the task is completed, it will appear in the task window with a line through it.

Documents

Use document templates to quickly create common documents such as letters and precedents. File and contact details are automatically inserted and the document is then stored on the file.

To add a document

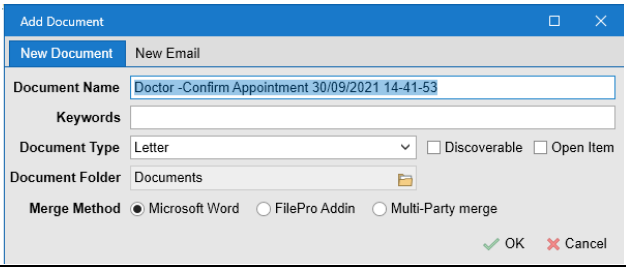
1. Open the file, and then click the **Documents** tab.



2. In the **Document** tree window, select the folder to store the document.

3. Click on  from the toolbar or click on  from the top navigation bar.

4. In the **Create new Document** window, double click on the template you want to use.



5. Type some descriptive information about the document:

   Document Name (must be unique)

   Add in any **Keywords** (used to search)

   Check **Discoverable** box to mark as a discoverable document

   Document Type defaults to document template

   Ignore **Open Item** option

6. Click **OK.**
7. **Merge Method** defaults to document template
8. If document is a merge file then a new Word document will open up with relevant fields included. Make any changes then save and exit document.
9. When returning to FilePro you need to click **Check In** within the Checked Out Documents screen. The new document will now appear in the document list.

Right clicking over a document provides you with the following options:

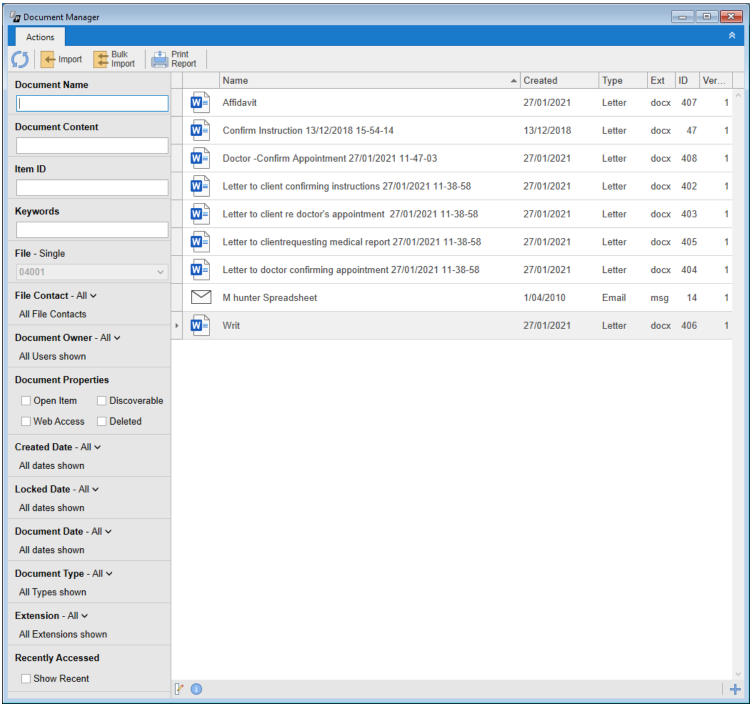
- Open/Edit – opens the document allowing for editing. Double clicking will give you the same result.
- Quick View - to view document without making changes.
- Preview - opens a preview pane displaying the highlighted document.
- Print - sends document to your default printer.
- Request Review - sends document to designated person for reviewing.
- Attach to email - attach to a new or existing email using Outlook.
- Attach PDF copy to email – attach a pdf copy of the document to a new or existing email using Outlook.
- Move to File - moves doc to new file and removes it from current file.
- Move to Folder - moves selected doc/s to a new folder in current file.
- Make New Copy - to copy to existing file or other file.
- Make PDF copy - creates a PDF file – requires Office 2007 SP2.
- Multi select documents using your control and shift functions on the keyboard to right click and create one PDF document. Change the order and create one document to email to clients.
- Make new version - creates a new version of the document.
- File Document - indicates in the 'FamLaw, Court and Probate' tab that document is filed.
- Attach to Brief – allows you to create an electronic brief that can be transferred to a USB if required, will include a copy of all documents and an index in Word or PDF format.
- Upload to SignIT – allows you to upload documents to the SignIT service for signing
- Document Log Report – a report that highlights changes made to a document, (when it is opened, who has made changes, if a new version or copy has been created).
- Save as - to save to hard drive or USB.
- Delete – to delete the document.
- Change Type - change the type of the document, often used after a Bulk import of documents.
- Rename – allows you to rename the document if required.
- Properties - to change various properties of the document.

Using the Document Manager

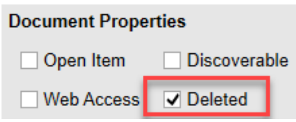
Use the Document Manager to manage documents within the file. This can be accessed by clicking the magnifying glass on your Documents toolbar.

1. Click the document manager icon (magnifying glass) in the toolbar of the file screen on the Documents tab.

2. You can now use the search criteria to manage your documents.

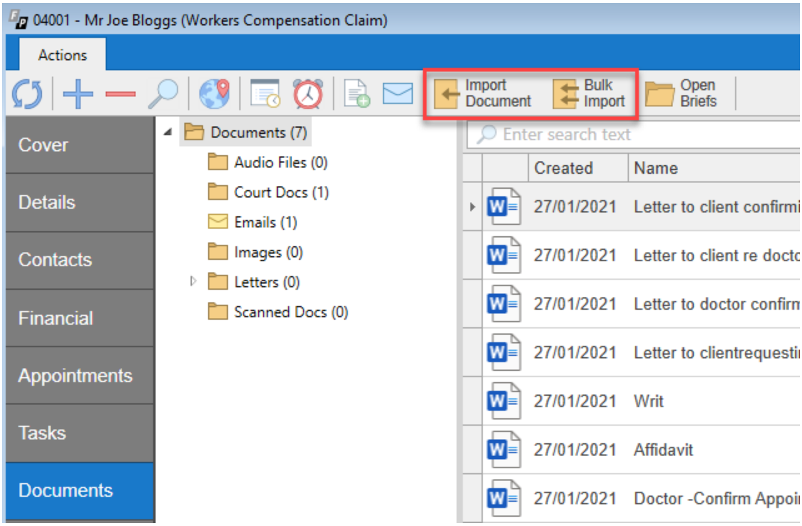


3. To retrieve a deleted document, you can check the Deleted box within Document Properties to see a list of deleted items. Right click on the deleted item to restore to previous location.



To import a document using the Import links

1. Open the file and navigate to the Documents tab. Click on Import Document.



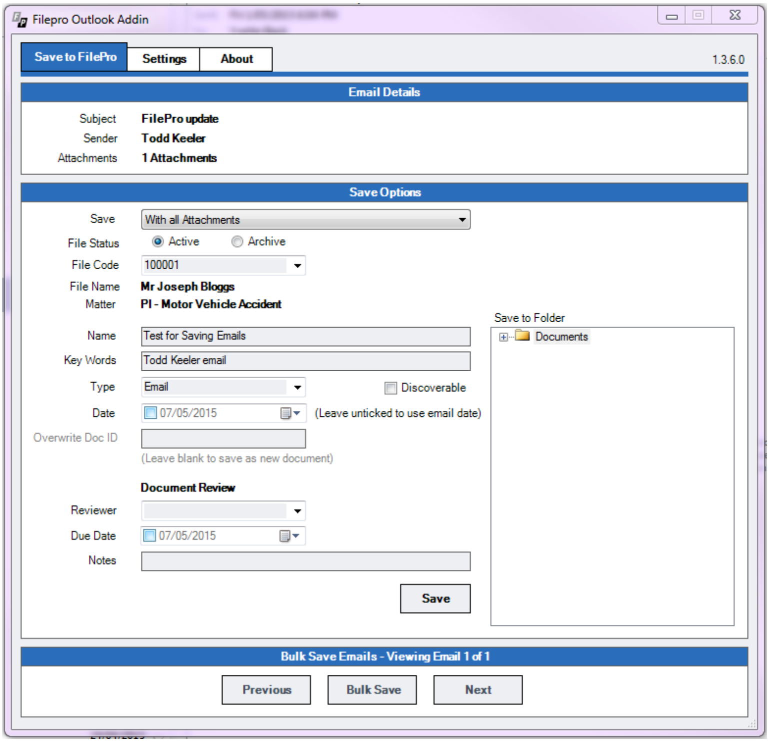
2. Fill in the required information; File Location, Document Name, Keywords (if applicable) and Document Type.
3. Select either the date the file was created, the date the file was modified or the current date, and click OK.
4. To import multiple documents, select Bulk Import Documents and select the Document Path instead. Include subfolders if needed.

To import a document using Drag and Drop

1. Navigate to a file or folder on your workstation.
2. Highlight the file or folder with your mouse and drag over your file/matter in FilePro.
3. A dialogue box will appear. Fill in the required information: **Document Type, File Owner** and **Document Date.**
4. Select the relevant Document Folder. Click **OK.**

To Save an Email to FilePro

1. Open Outlook.
2. Select the email(s) you wish to save into FilePro.
3. Right click on the email and select **Save to FilePro**.



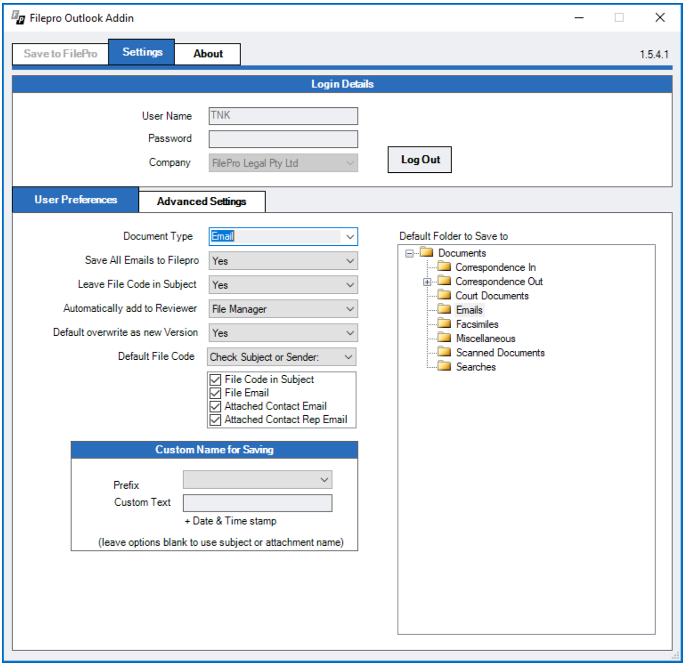
4. Select the **Save method**.
5. This controls which part of the email you wish to save to FilePro. If you select **Email with attachments,** the email is saved with the attachment embedded in the email. If you want to save them separately, you must first save the Email only, then save the attachments individually. You are also able to Bulk Save attachments if required.
6. Select the **Save to folder**. This will default to the Documents folder if you don't make a selection.
7. Select the appropriate **Save Information.**

8. Click **Save**, then click **Close.** Note that the email can be deleted from Outlook afterwards and it will remain in FilePro.

9. Select more than one email **(Ctrl Click**), follow 5. and 6. above then select **Bulk Save** to save all selected emails to FilePro.

FilePro Outlook Addin Settings

There are also a number of other settings that can be configured to make your email saving experience more intuitive.



You can nominate a default Type to be assigned to your saved items, and a default destination sub-folder on the right.

If you tick the box to **Save All Emails to FilePro**, when you send any email drafted from inside or outside of FilePro, the save window will appear.

You can nominate your own custom naming convention for saved emails and there are a few other default settings.

The **Default File Code** option will try to predict the appropriate file code when you save an email, based on the boxes you check here.

Notes

Invoicing

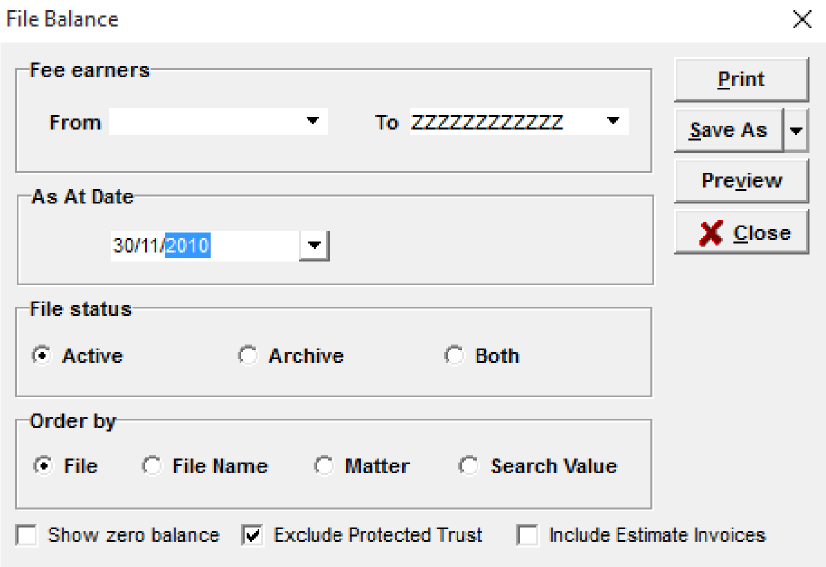
Invoicing usually involves a couple of steps.

Firstly, you need to find out whether a file should be billed. This can be done by printing the **File Balance** report which details matter by Fee Earner who will select which matters to bill.

Secondly, you need to check the accuracy and appropriateness of time entries. You can do this by viewing the file details through the financial tab in the file screen or by using the **Unbilled Cost** report. This report shows detailed work in progress, unbilled office costs and unbilled disbursements. It is designed for the fee earner to review outstanding costs and edit any transactions prior to billing the file.

To print a file balance report

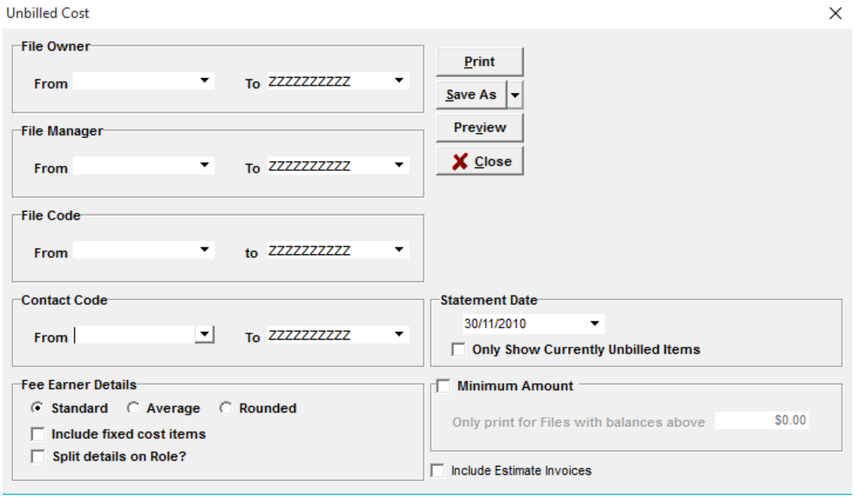
1. On the Files menu, point to Reports, then click File Balance.



2. Select the Fee earner range, click Print.
3. Set your options in the print dialog box then click **OK.**

To print an unbilled cost report

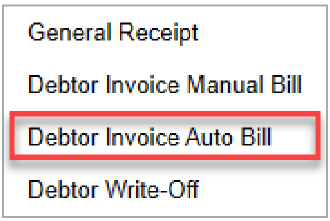
1. On the Files menu, point to Reports, then click Unbilled Costs.

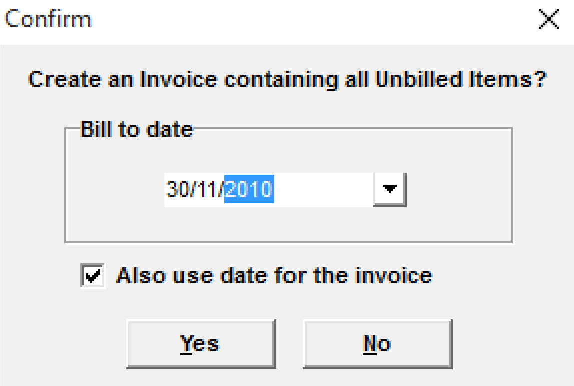


2. Enter the relevant criteria, then click Print.
3. Set your options in the print dialog box then click OK.

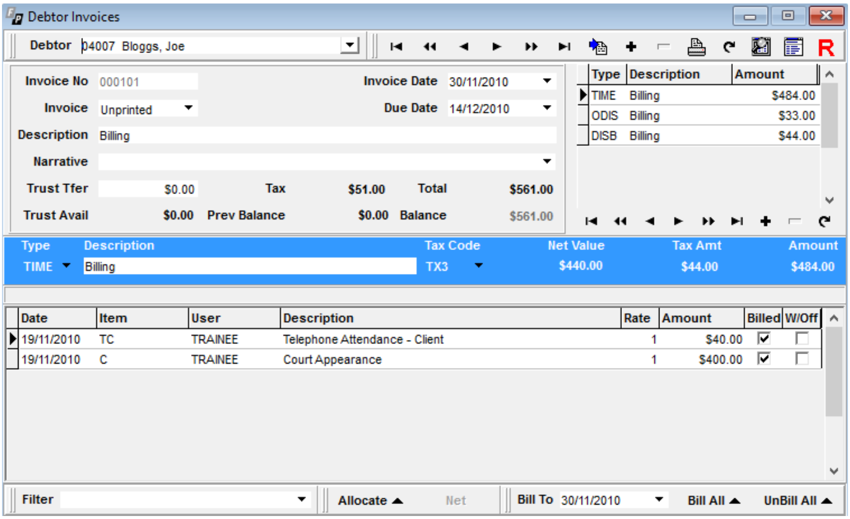
To create an invoice

1. Open the file, and then click the Financial tab.
2. Make relevant amendments to Time, Office & Disbursements
3. Click DEBTOR TOTAL (inc GST)
4. Click  on the toolbar of the file screen
5. Select Debtor Invoice Auto Bill.





6. Enter the date you wish to bill to and click Yes.
7. A bill has been created which contains all unbilled items up to and including the nominated date



Modify the header details:

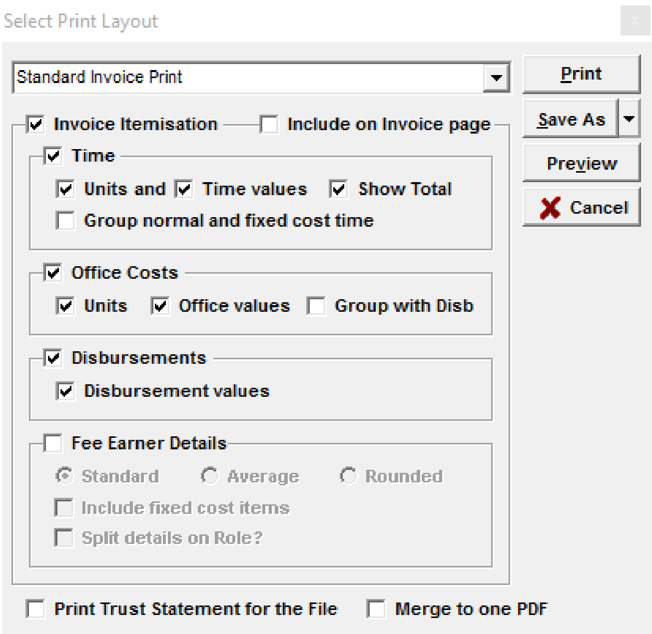
1. The Invoice No is generated automatically.
2. Select the Invoice Date (defaults to today's date).
3. Set the Invoice to be Unprinted or Printed.
4. Set the Due Date (defaults to one month from today's date).

5. Enter a Description for the invoice (defaults to Matter or what is set in user preferences and is what will appear in the Debtor Transactions screen for the file).
6. In the Narrative field, click the lookup to enter your text if your invoice has been set up to include one, or select from a template.
7. Enter amount to be transferred from trust in the Trust Tfer field.

   This will not transfer money from trust, but the amount to be transferred will be shown on the invoice.

Modify the line details:

1. By default everything has been selected. Deselect the entries you don't wish to bill by either double clicking on individual time items or click UnBill All to deselect all entries. Right click over entries and select View to change items.
2. If an amount greater or less than the time total needs to be billed then click **Allocate.** Enter the amount and click **Distribute,** then **Close.**
3. When any changes have been made, click the printer icon on the toolbar.



4. Select the invoice template you wish to use.

5. Leave **Print Invoice Itemisation** checked to print an itemisation and check the items you wish to appear on it.
6. Click **Print**, then click **OK** when each print dialogue box appears.
7. To reset the invoice, click  icon on the toolbar.

Emailing Invoices

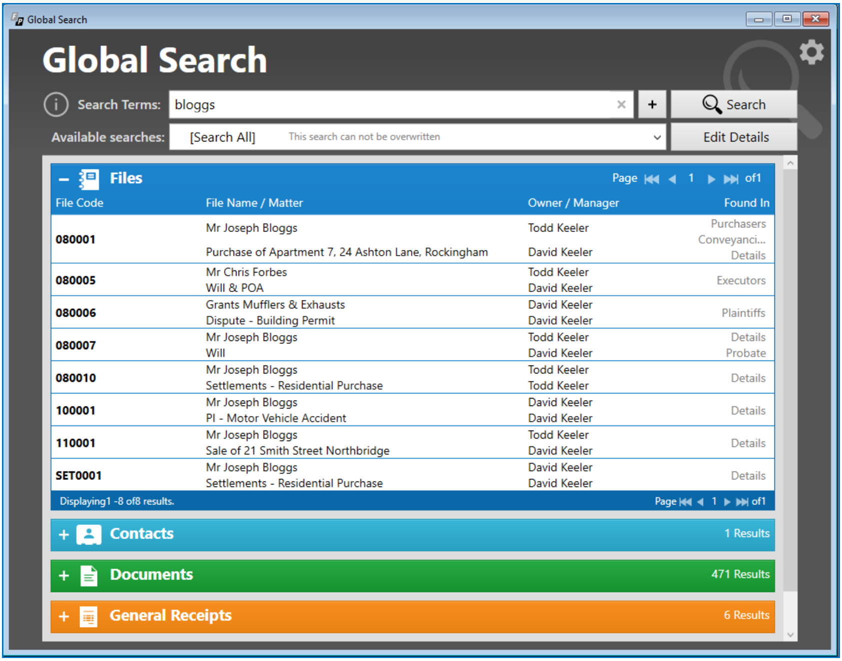
1. Right click on the invoice within the file.
2. Select Attach to Email as PDF.
3. Select the required email address.
4. Select the invoice layout you wish to use and the relevant Email Template.
5. Click **Attach,** Outlook will open and you can send your email.

Notes

Global Search Screen

When performing a conflict check within FilePro, the Global Search screen will be your most valuable tool. You can search the entire system, including document content, timesheets & financials, matters & contacts, safe custody etc. Or you can design more specific search 'templates' which only target certain areas of the database and documents.

Go to **Files – Global Search** from the main menu.

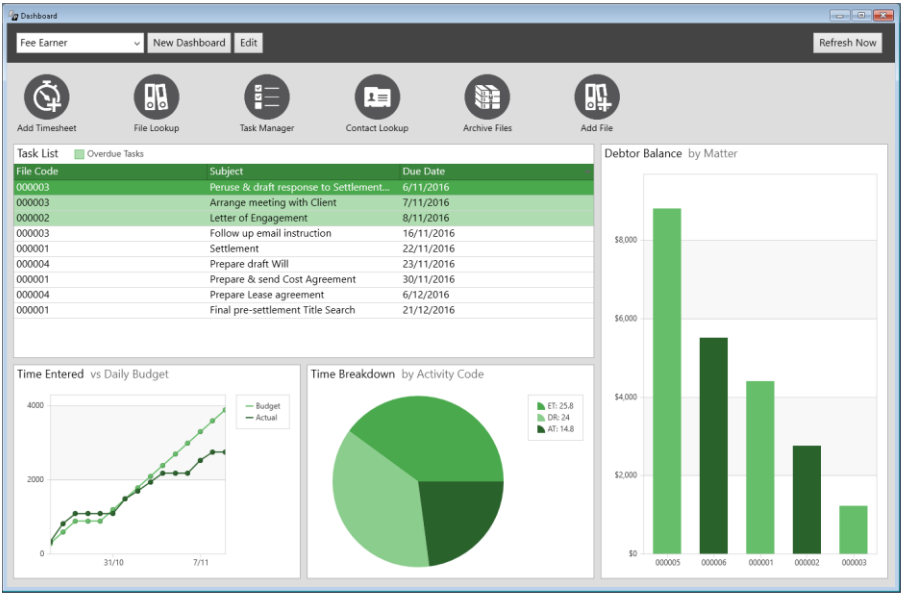


If too many matches appear, you can continue to narrow down the results by adding more search criteria. Double-clicking on the results will open the relevant records so you can determine if a conflict exists.

PLEASE NOTE: If you wish to complete a document content search it is very important to ensure you include inverted commas in your search (ie "Joe Bloggs").

Dashboard

The FilePro Dashboard allows you to see important/summary information at a glance.



The Office Administrator will need to set this up for you and can contact the FilePro Support desk for assistance with this.

Once users have been granted access to the Dashboard, it can be accessed via the Files menu.

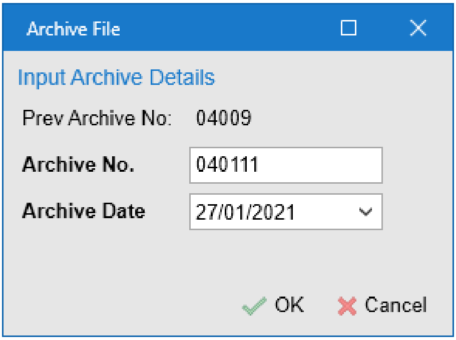
Users are able to edit their own Dashboard provided the correct permissions have been given.

Archiving

Once work on a file has been completed it should be archived to avoid cluttering up the active file listing. You can view the archived file's details at any time by choosing **E/M Archive Files** from the **File** menu.

To archive a file

1. Open a file then click minus on the file toolbar.
2. Click Yes to confirm.



3. Enter the Archive No (defaults to the file number).
4. Enter the Archive Date (defaults to today's date).
5. Click OK.

Note: If a file has balances on it, it will not be able to be archived.

To reopen an archived file

1. On the Files menu, click E/M Archive Files.
2. Select the file you wish to reopen from the lookup and click OK.
3. Click on the toolbar to Re-Activate file, then click YES.
4. Your file will now appear in the active files list.

Notes