

MANAGING DOCUMENTS & E-MAILS

Software Overview

INTRODUCTION

It is fair to say that Documents are the lifeblood of any firm. An efficient service is only possible if attorneys are able to create, edit and manage documents with a minimum of fuss. GhostPractice has included as standard, a comprehensive and sensible approach to document management. Hand in hand with the matter-centric design, you will be pleasantly surprised at how easy it is to manage documents.

GhostPractice

DOCUMENTS

The screenshot shows the GhostPractice - Fee Earner interface. The top menu includes File, GoTo, View, Tools, and Help. Below the menu is a toolbar with icons for Legal Diary, Fees and File Notes, Transaction History, Document Management, Matters, Contacts, Convert, Run Reports, and Disbursements. The main window is titled "Legal Diary" and displays a table of matters. A context menu is open over the selected matter, showing options: Edit Matter, Attach Documents, and View Documents. The right-hand pane shows "MS Auto Investments - Smith v MS Auto" with sections for "Process Steps" and "Ad Hoc Activities". The "Ad Hoc Activities" section lists actions such as Assign Task, Assign To Colleague, Assign to correspondent, Attach Document to Matter, Diarize Matter, and Send Email. At the bottom, a table shows financial data:

Type	Debit Amount	Credit Amount	Reference
Unbilled	700.00		Matthew Smith
Unbilled	20,400.00		Matthew Smith
Note			Matthew Smith
Note			Matthew Smith
Note			Matthew Smith

GhostPractice will allow you to view, edit and attach documents in many places throughout the system. The most common way to access document management is by right clicking on the document icon in the Legal Diary. This icon is only present if documents are indeed attached. If it is blank, clicking on the column will allow you to attach a new document.

You may also attach a document by using an Ad-Hoc action. An e-mail sent by the system will be treated as a document. If you use the Ad-Hoc action "Send E-mail", the system will automatically attach the e-mail to the currently selected matter.

EMAILS

GhostPractice - Fee Earner

File GoTo View Tools Help

GhostPractice

Legal Diary Fees and File Notes Transaction History Document Management Matters Contacts Convert Run Reports Disbursements

Legal Diary for Matthew Smith

Smith Search Advanced Search Previous Results

View files Recent on 05 May 2006 for - Select Subordinates - Go Assign Files Recall Change Process Step

ID	Client Name	Matter Name	Debtor Name
Past Due			
DEB1	ACME Financial Services	ACME Personal Loans	Dewald September
DEB2	ACME Financial Services	ACME Personal Loans	Christelle Chetty
DEB3	ACME Financial Services	ACME Credit Card	John Meyers
MAT1	MS Auto Investments	Smith v MS Auto	N/A
MAT4	ACME Holdings LTD	Restructuring of ACME	N/A

ACME Holdings LTD - Restructuring of ACME

Process Steps Go

- Consultation with

Ad Hoc Activities Go

- Assign Task
- Assign To Colleague
- Assign to correspondent
- Attach Document to Matter
- Diarize Matter
- [Send Email](#)

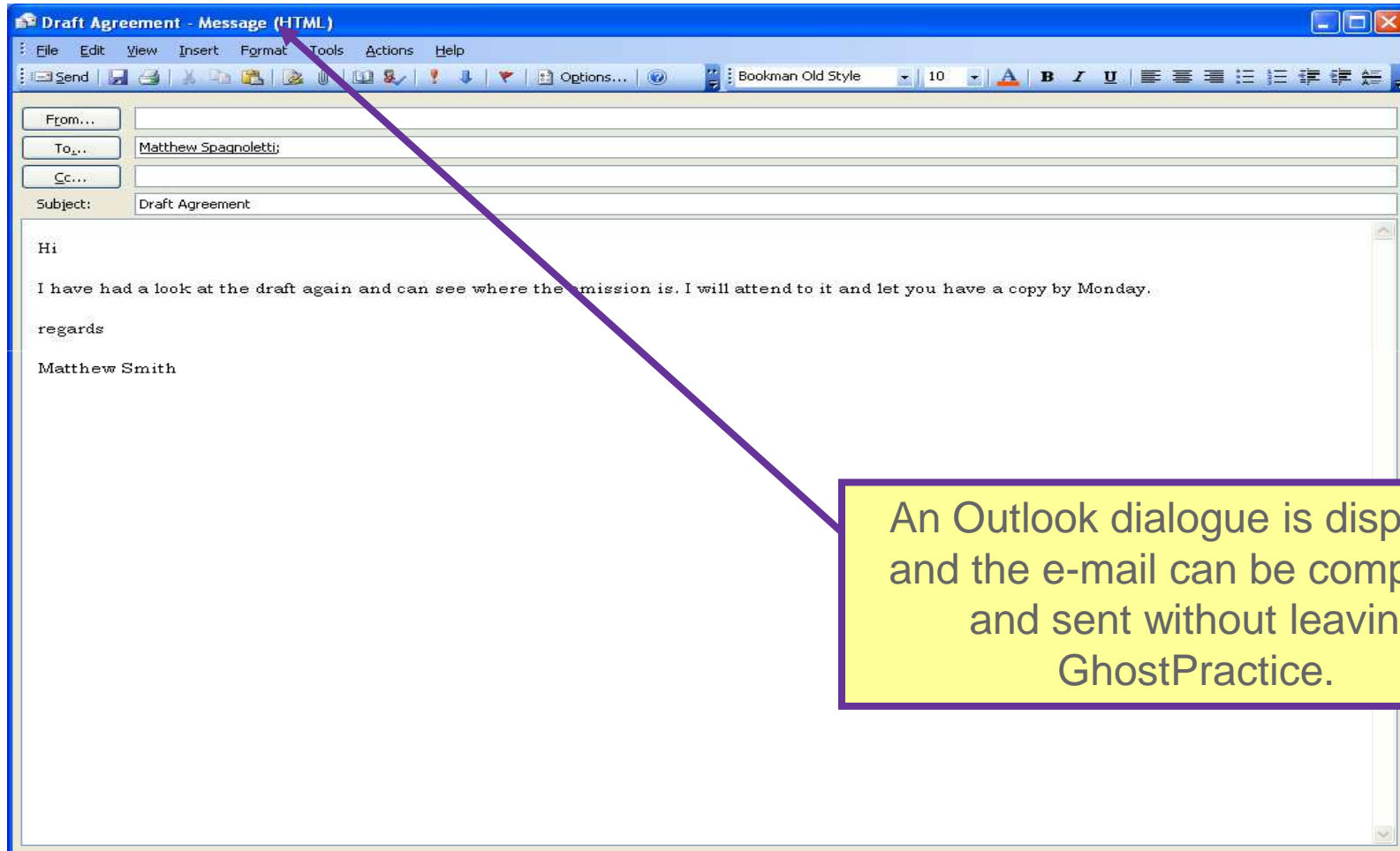
So if I want to send an e-mail to my client, I click on the "Send E-mail" action

Recent File History Contact Details Account Balances Tasks Assigned to Others

Date	Fee Earner	Narration	Type	Debit Amount	Credit Amount	Reference
05 May 2006, 10:00 AM	Matthew Smith	Telephone Consultation with client to discuss draft agree...	Unbilled	900.00		Matthew Smith
04 May 2006, 03:48 PM	Matthew Smith	Rediarised from 21 Apr 2006 to 04 May 2006 by Matthew...	Note			Matthew Smith
21 Apr 2006, 09:10 PM	Matthew Smith	AssignFile 'Assign to Colleague'	Note			Matthew Smith
21 Apr 2006, 09:01 PM	Matthew Smith	AssignFile 'Assign to Colleague'	Note			Matthew Smith

GhostPractice

OUTLOOK INTEGRATION



An Outlook dialogue is displayed and the e-mail can be completed and sent without leaving GhostPractice.

GhostPractice

SAVING EMAILS TO GHOSTPRACTICE

The screenshot shows the GhostPractice - Fee Earner interface. The 'Document Management' section is active, displaying details for a matter named 'Restructuring of ACME' with account number 'MAT4'. A table lists documents attached to the matter:

Name	Size	Type	Date Modified	Date Created	Owner	Last Edited By
Draft Agreement	2 KB	HTML Document	2006/05/05 09:59 AM	2006/05/05 09:59 AM	matthews	matthews
Email Draft Agreement 05 May 2006, 10:24....	0 KB	XML Document	2006/05/05 10:24 AM	2006/05/05 10:24 AM	matthews	matthews

A callout box with a purple border and yellow background points to the email document in the table, containing the text: "And the e-mail is automatically attached to the matter and can be viewed through document management."

GhostPractice

DOCUMENTS LINKED TO MATTERS

The screenshot shows the GhostPractice - Fee Earner interface. The 'Document Management' section is active, displaying account details for 'Xpert Group Acquisition' and a list of documents linked to the matter. A callout box points to the document list, and another callout box explains the process of accessing a document.

Name	Size	Type	Date Modified	Date Created	Owner	Last Edited By
A010	43 KB	Microsoft Word Document	2006/08/16 08:48 PM	2006/08/16 08:48 PM	matthews	matthews
Authority to Pay FLEXI RDraft Document	38 KB	Microsoft Word Document	2006/09/12 01:51 PM	2006/09/12 01:51 PM	matthews	matthews
Authority to Pay FLEXI RESERVE ACCOUNT...	38 KB	Microsoft Word Document	2006/09/12 01:51 PM	2006/09/08 02:52 PM	matthews	matthews
document0002	47 KB	Microsoft Office Document Imaging File	2006/08/21 02:48 PM	2006/08/21 02:48 PM	matthews	matthews
Matter_GeneralLetterToClient MAT8 - 21 Au...	62 KB	Rich Text Format	2006/08/21 02:45 PM	2006/08/21 02:45 PM	matthews	matthews

In order to access one of the existing documents, I merely click on the name in the list and it will load within the application it was created in.

One of the major benefits of a matter-centric design is the availability of information when you are on a particular matter. Document Management is another benefactor of this principle. Here all documents will be listed for this matter.

FINDING DOCUMENTS

The screenshot shows the GhostPractice - Fee Earner software interface. The top menu bar includes File, GoTo, View, Tools, and Help. Below the menu is a toolbar with icons for Legal Diary, Fees and File Notes, Transaction History, Document Management, Matters, Contacts, Convert, Run Reports, and Disbursements. The main content area is titled "Document Management" and features a search bar with a "Search" button and links for "Advanced Search" and "Previous Results". Below the search bar are buttons for "Attach", "Open", "Delete", and "Refresh". The "Account" section shows "Matter" selected, with "Debt recovery debtor" and "Client" options. The "Account Details" section shows "Matter name: Restructuring of ACME" and "Client name: ACME Holdings LTD". A table below lists documents with columns for Name, Size, Type, Date Modified, Date Created, Owner, and Last Edited. The table contains one entry: "Draft Agreement" (2 KB, HTML Document, 2006/05/05 09:59 AM, 2006/05/05 09:59 AM, matthews, matthews). A purple arrow points from a text box to the "Draft Agreement" entry.

Name	Size	Type	Date Modified	Date Created	Owner	Last Edited
Draft Agreement	2 KB	HTML Document	2006/05/05 09:59 AM	2006/05/05 09:59 AM	matthews	matthews

Now if we go to Document Management for this matter, you will see that the e-mail we attached is available for later viewing.

Another way to attach a document is while I am raising a fee. It may be useful when referring to an e-mail request in my fee narration (or the content/attachment to an e-mail), that I attach a copy here.

DOCUMENTS IN TRANSACTION HISTORY

GhostPractice - Fee Earner

File GoTo View Tools Help

GhostPractice

Legal Diary Fees and File Notes Transaction History Document Management Matters Contacts Convert Run Reports Disbursements

Transaction History

Save Selections Recall Selections: Go Display Results Export Results Print Results % Apply Interest:

MAT4 Restructuring of ACME (ACME Holdings LTD) as at 05 May 2006, 10:07 AM

Post Date	Narration	Attachments	Reference	Debit	Credit
04 May 2006, 03:48 PM	Rediarised from 21 Apr 2006 to 04 May 2006 by Matthew Smith. Comment:		Matthew Smith		
05 May 2006, 12:00 AM	Telephone Consultation with client to discuss draft agreement	Draft Agreement.htm	Matthew Smith	900.00	

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Lastly, whenever you look at the Transaction History of any given matter, the documents that you have attached will reflect as "Attachments" on the matter. You can click on the hyperlink (attachment name) and the document will load directly.

SUMMARY

- Please note: This has been a highlighted presentation of Managing Documents and E-mails in GhostPractice. We would welcome the opportunity to present and discuss GhostPractice with your firm.
- Please call Matthew Spagnoletti on 082 568 4738 to set up an obligation free demonstration of GhostPractice.

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