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User Manual

# Cases

# Preface

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With this manual you will gain a basic understanding on how Legisway Essentials is structured and how this impacts the way you use the entire system. Following this manual in order will allow you to quickly start populating your system with **Cases**.

Editor or an Administrator access is required to make use of these instructions. Please contact your Legisway Essentials Administrator if you do not have a username and password. If you require further assistance with logging in, please contact Legisway Essentials Support.

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# 1 Introduction

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In this manual we turn our attention to the **Cases** theme. The main purpose of this manual is to help you, as a user, with:

- Creating **Cases**
- Managing your **Cases**
- Adding information to your **Cases** dossier.
- Collecting information from a **Cases** into one or multiple reports.
- Making use of alerts when applicable.



Figure 1 : Legal Management dashboard

From the main Legal Management dashboard, select **Cases** (figure 1).

## 2 Legisway Essentials Best Practice

Before you can start populating your system, it is important to know that each of the **Cases** within Legisway Essentials is always based on a 3-layer data model. In order to get an idea of this model, a simplified Entity Relation Diagram (ERD) is presented below. It is important to become familiar with this logic since it will help you to populate your system correctly.

This image below is an example of a relationship model of the information types within the Legisway Essentials database (figure 2). Any 'Dossier' information type will be directly linked to a Group Company. This links the dossier to the corporate information, which may already be present in your system.

Any dossier will automatically be linked to 'Documents', 'Risks', 'Tasks' and 'Notes'. All are 'Content' information types.

A design is always based on a 3 layer data model: Entities, Dossier and Content.

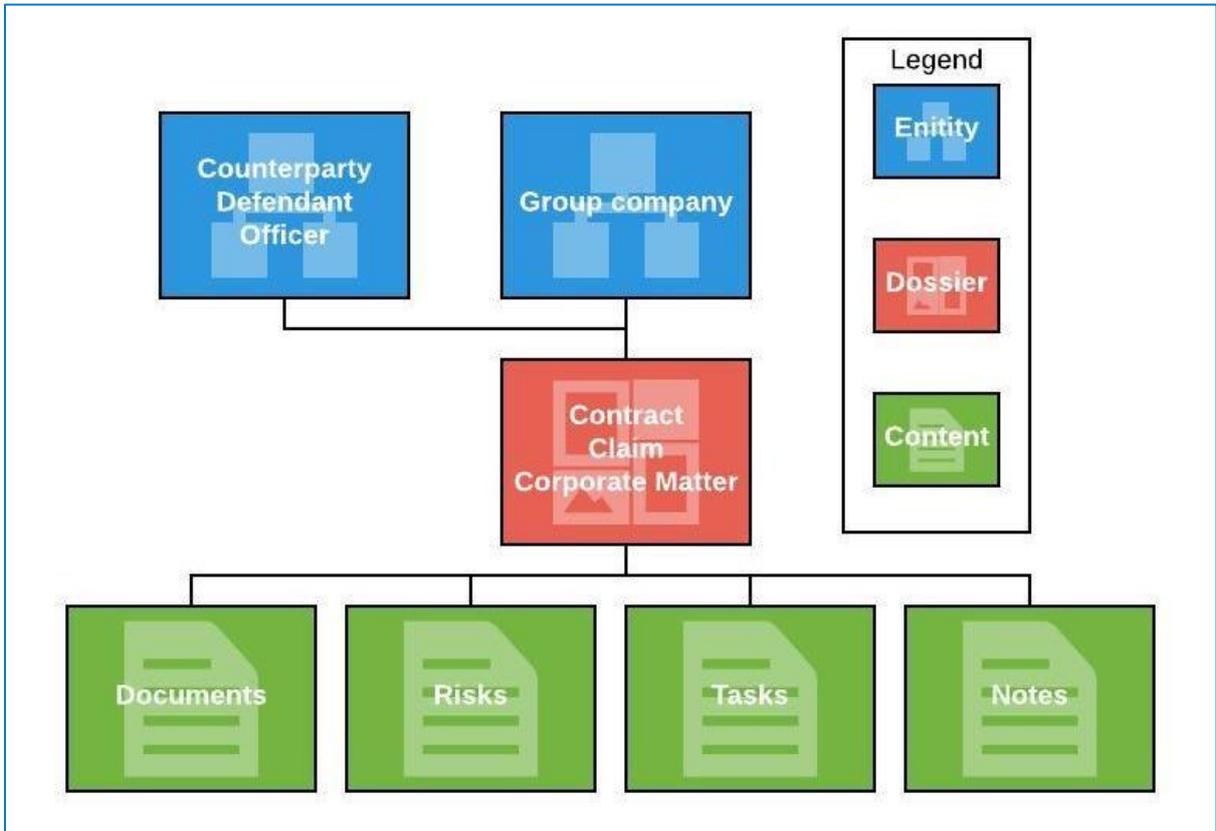


Figure 2 : Entity Relation Diagram

Specific Sub-types may be used to provide a single line in reporting, but allow for separate access and/or entry fields. E.g. a Case may have subtypes: Claims and Projects.

## 3 Dashboards

This chapter explains the structure of the theme dashboards. In the Cases theme there are two dossier types: Claims and Projects. Your organization may have different roles within these dossier types, for example: a Group company or a Counterparty. This could vary according your wishes.

### 3.1 Cases Overview dashboard

Selecting the Cases theme from the main Legal Management dashboard will take you to a dashboard which provides you with several useful reports and quick links to keep track of you and your colleagues' activity (figure 3).

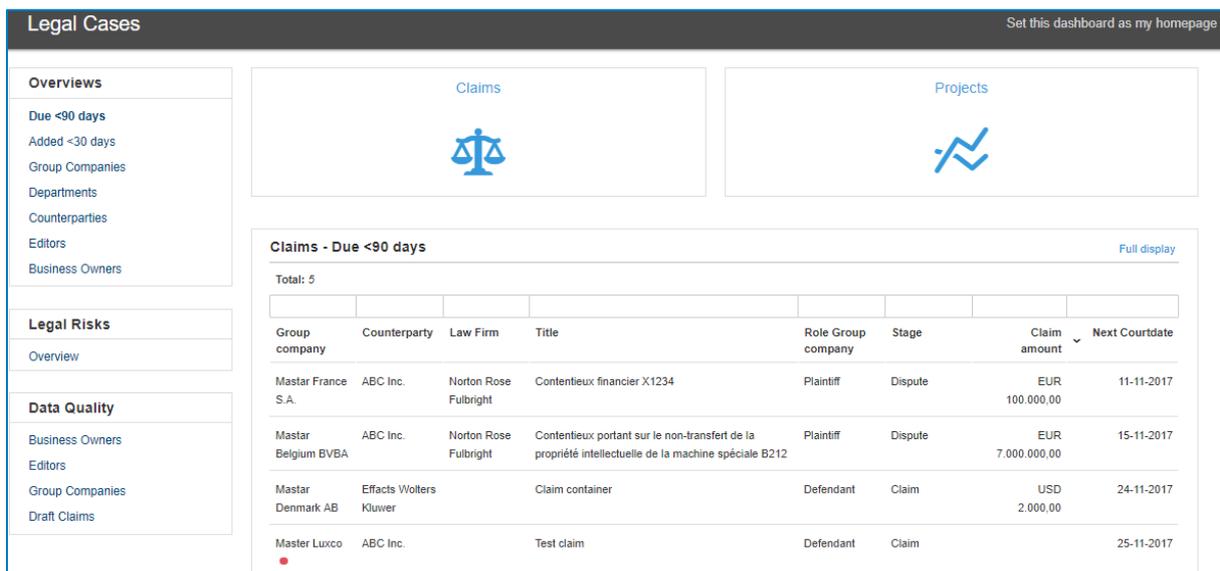


Figure 3: Dashboard Cases

#### **Overviews**

Due <90 days: A view of dossiers and content with an expiration or review date coming up.

Added <30 days: A view of dossiers and content that are added within 30 days.

Statistics: Each dashboard lets you track active and past dossiers for all parties involved: Group Companies, Departments, Counterparties, Editors, Business Owners, and more.

#### **Risks**

Get a quick overview of all active Risks registered within the theme, as well as the mitigating measures undertaken and risk levels. Risks are sorted in descending order of Assessment Date, so newly identified potential risks are immediately apparent.

#### **Data Quality**

Formerly part of the Data Quality dashboard, those reports allow Administrators to perform quick checks over the quality and consistency of their legal information across a single theme. For **Cases**, the following reports are shown:

- Inactive Business Owners with Active Claims
- Inactive Editors with Active Claims
- Inactive Group Companies with Active Claims
- Draft claims with an Effective date in the past

## 3.2 Sub-dashboards: Cases

As shown in the Cases overview dashboard, there are two sub-dashboards: Claims and Projects (figure 4). Each Cases dashboard will be explained in paragraphs below.

### 3.2.1 Sub-dashboard: Claims

Group company	Counterparty	Law Firm	Title	Role	Stage	Claim amount	Effective date
Ebelling Ltd	Curae Ltd		Debt Recovery against X Ltd	Plaintiff	Litigation	USD 500.000,00	06-02-2018
Mastar Holding UK	CallCenterSuperStar Ltd	Linklater.com	Breach of contract - cancellation without notice of contract	Plaintiff	Dispute	GBP 23.000,00	02-01-2018
Mastar Barcelona S.A.	Paper & Co	Linklater.com	Dispute between Mastar Barcelona SA and Paper & Co over performance of contract	Plaintiff	Dispute	EUR 4.000,00	29-12-2017
Mastar France S.A.	New Client XYZ	Linklater.com	Breach of commercial lease - non-repair of water leak - Paris Ave. des Colombes	Plaintiff	Claim	EUR 130.000,00	01-12-2017
Mastar Barcelona S.A.	ABC Inc.	Linklater.com	Patent infringement	Plaintiff	Claim	USD 5.000,00	22-11-2017

Figure 4: Sub-dashboard Claims

#### **Part 1:**

- The module dashboard contains a blue 'New' button, which allows you to start quickly populating the system with information.

#### **Part 2:**

- On the left side of the dashboard, you see some standard Status reports. These let you automatically filter Dossiers by status. Clicking one of the buttons will show you the report directly on the right. The colored square next to each Status report is reminiscent of the colors shown in Dossiers.

#### **Part 3:**

- Below, you see some standard Overview reports. From here, you can view dossiers with an expiration or review date coming up, recently added content, open tasks, and risks.

#### **Part 4:**

- If you decide to compose your own report, you can use the custom report buttons as shown here. You may also use the Personal Reporting feature, which is located in the upper-right hand corner.

### 3.2.2 Sub-dashboard: Projects

The screenshot shows the 'Legal Cases - Projects' sub-dashboard. At the top, there are two tabs: 'Claims' and 'Projects'. Below the tabs is a navigation bar with a search box and various utility icons. The main content area is titled 'Legal Cases - Projects' and includes a 'New Project' button (labeled 1), a 'Status' filter panel (labeled 2), an 'Overviews' panel (labeled 3), and a 'Custom Reports' panel (labeled 4). The central part of the dashboard displays a table of active projects with columns for Group company, Department, Editor, Project, Type, Effective date, and Status.

Group company	Department	Editor	Project	Type	Effective date	Status
Master International Holding B.V.	Finance	Cabezas, Caroline	Audit - Mifid II project - Legal on-loan to help accountant identifying relevant commercial leases 1year + 00123	Audit	25-09-2017	●
Mastar Financing Inc.	Legal	Bloem, Jacqueline	Implementation Effects	Other	13-11-2017	●
Mastar France S.A.	Sales	Cabezas, Caroline	IPO - Audit current long commercial leases 0014	Audit	04-01-2018	●
Mastar France S.A.	Logistics	Cabezas, Caroline	Review of all logistics contracts over 100k from 2015-present 2034	M&A	06-01-2018	●

Figure 5: Sub-dashboard **Projects**

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#### **Part 3:**

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## 4 Create and add information

In this chapter you will learn how to build different Cases dossier types. These types will be specifically outlined in paragraphs below.

The ability to add a new Case to your Legisway Essentials system is dependent on your level of access. Generally, only Administrators and Editors are allowed to add data to a system. Navigate to the dashboard for the dossier type which you want to create content for. From there, a “New” button will be visible in blue above reports. Clicking the button will forward you to a ‘Create’ screen with some data entry fields. The data entry fields come in a wide variety, from drop-down lists where a user can select pre-determined values, to free text areas to enter data.

A list and explanation of each of these fields can be found below. Fields marked with a red asterisk (\*) are required fields, trying to save the input without entering these fields will result in an error message that tells what information is missing.

When the form is filled in, click on the button [Save] to finalize the data and proceed to the created dossier. [Save & New] finalizes the data and creates a new, empty create form. [Save & Copy] finalizes the data and shows an identical, pre-filled create form. Click [Cancel] to cancel the creation of a new dossier.

### 4.1 Create a Claim

Navigate to the Claim dashboard from the Case Overview dashboard.

On the left side, you will see the blue menu item to create content. Clicking on it will take you to the following Create form (figure 9):

The screenshot shows the 'Create Claim' form with the following fields and options:

- Status \***: ACTIVE (green), DRAFT (yellow)
- Editor \***: Dropdown menu
- Group company \***: Dropdown menu
- Counterparty \***: Search or create a new subject. Includes Search and Create buttons.
- Law Firm**: Dropdown menu. Includes Search and Create buttons.
- Business Owner**: Dropdown menu. Includes Search button.
- Department \***: Dropdown menu
- Title \***: Text input field
- Stage**: Dropdown menu
- Role Group company \***: Dropdown menu
- Claim summary**: Large text area
- Claim amount**: Currency dropdown (USD) and text input
- Provision**: Currency dropdown (USD) and text input
- Effective date \***: Date picker. Note: Start date. Meaning the date the matter comes into effect.
- Next Courtdate**: Date picker

Figure 9: Create a Claim

- Status: When creating a new dossier such as a claim, the user can now select if the claim should be set as Active or as Draft from the start. These statuses can be changed at a later time. Selecting 'Draft' will make the Effective date optional.
- Editor (list): The person who is responsible for filling in this form.
- Group company: This a drop-down list of all Group companies previously entered. You can select multiple if needed. To search, simply type the name of the company you are looking for in the search area and click the search button underneath as shown below.
- Counterparty: This field allows you to either search your system for previously created companies and persons or create a new one. It is recommended to search first, even if you are quite sure the Counterparty you need is yet to be created. This way you avoid creating duplicates. To search, simply type the name of the company or person you are looking for in the search area and click the search button underneath as shown below.
- Law firm: The law firm involved
- Business Owner: The person responsible for this claim on the Business side. This person will get alerts.
- Department: Pre-defined drop-down list with departments or create one.
- Title: The title of the claim.
- Stage: Pre-defined drop-down list with Dispute, Claim and Litigation.
- Role Group Company: Pre-defined drop-down list with Plaintiff, Defendant and Plaintiff & Defendant.
- Claim summary: Text area for a summary of the claim.
- Claim amount: A currency field that represents the claim amount.
- Provision: A currency field that represents the claim provision.
- Effective date (date field): Date on which the claim took effect.
- Next Court date: Date of next activity in court.

## 4.2 Create a Project

Navigate to the Project dashboard from the Cases Overview dashboard.

On the left side, you see the blue menu item to create content. Clicking it will take you to the following Create form (figure 10):

The screenshot shows a web form titled "Create Project". At the top, there are four buttons: "Save", "Save & new", "Save & copy", and "Cancel". Below these are several form fields:

- Status \***: A dropdown menu with "ACTIVE" (highlighted in green) and "DRAFT" (highlighted in yellow) options.
- Editor \***: A dropdown menu.
- Group company \***: A dropdown menu with a search icon and a "Search" button below it.
- Department \***: A dropdown menu.
- Name \***: A text input field.
- Number**: A text input field.
- Type \***: A dropdown menu.
- Effective date \***: A date picker field. Below it, a note reads: "Start date. Meaning the date the matter comes into effect."

At the bottom of the form, there are another set of buttons: "Save", "Save & new", "Save & copy", and "Cancel".

Figure 10: Create a Project

- Status: When creating a new dossier, for instance a project, the user can now select if the project should be set as Active or as Draft from the start. These statuses can be changed at a later time. Selecting 'Draft' will make the Effective date optional.
- Editor (list): The person who is responsible for filling in this form.
- Group company: This a drop-down list of all Group companies previously entered. You can select multiple if needed. To search, simply type the name of the company you are looking for in the search area and click the search button underneath as shown below.
- Department: Pre-defined drop-down list with departments or create one.
- Name: Name of the specific project.
- Number: Number of the specific project.
- Type: Pre-defined drop-down list with Audit, M&A and Other.
- Effective date (date field): Date on which the project took effect.

## 5 Standard Features

You are now able to create a dossier with general information and extra information. In every dossier there are also some standard features available. With this feature you can add extra content to the dossier. This chapter contains an explanation of each feature.

### 5.1 New Document

This section will give you an explanation about uploading documents to your dossier.

#### 5.1.1 Drag and Drop or mail

Drag and Drop allows you to quickly add one or multiple files (all file types are supported) from your computer to a dossier, as shown in below (figure 11).

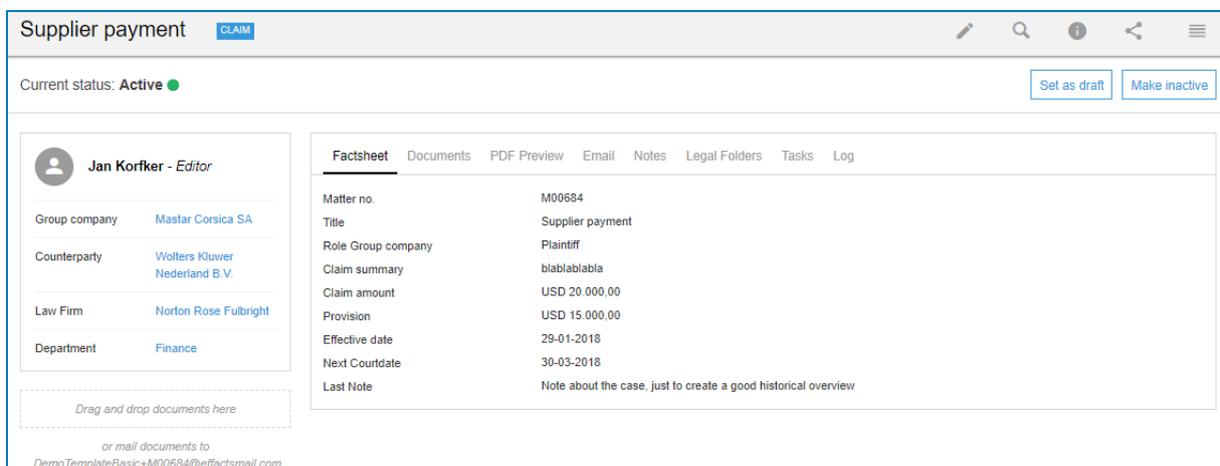


Figure 11: Add documents to a dossier

To drop a document, click and hold the document from your computer and drag it to the box “Drag and drop documents here or mail”. This will start uploading the document(s). The progress of the upload is indicated at the top of the screen.

**NOTE:** It is not possible to drag a file from an email. It needs to be saved on your computer, before you can upload it to Legisway Essentials.

**NOTE:** It is possible to add multiple documents to the same dossier or folder. However, we suggest that you limit this to five at a time as not all browsers can handle an amount greater than that.

To mail a document, mail the document from your mail account to the referred mail address in the red box. This will automatically add the document to the dossier. Once added, the document(s) will appear under the ‘Documents’ tab (figure 12):

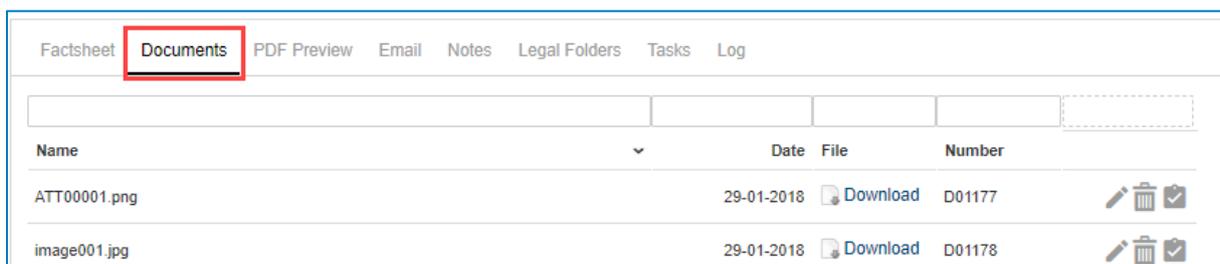


Figure 12: Added document to a dossier

### 5.1.2 Manually add a document

To manually create a new document, go to the dossier page and click [Add Document] at the right menu of the screen.



Clicking the button will forward you to a 'Create' screen which is quite similar in its functionality to other create screens in the system (figure 13). An explanation of each field is given below.

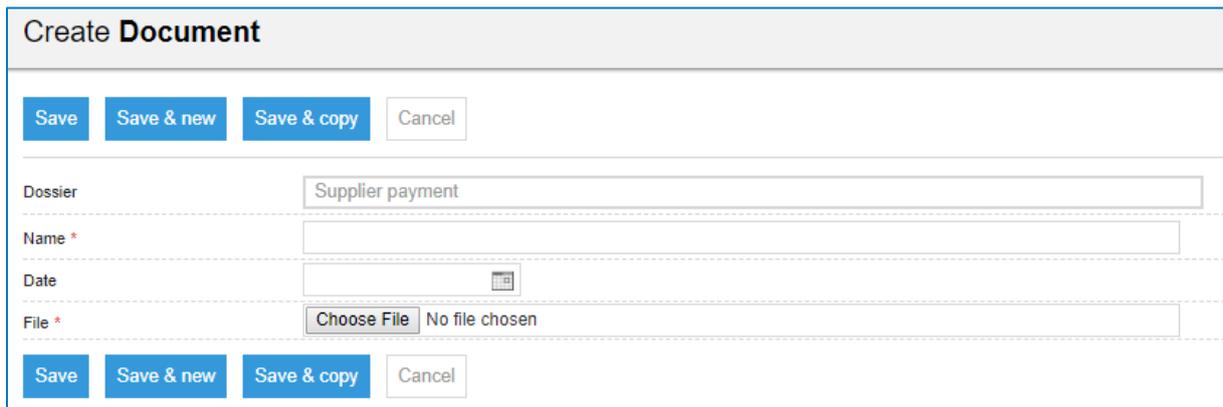
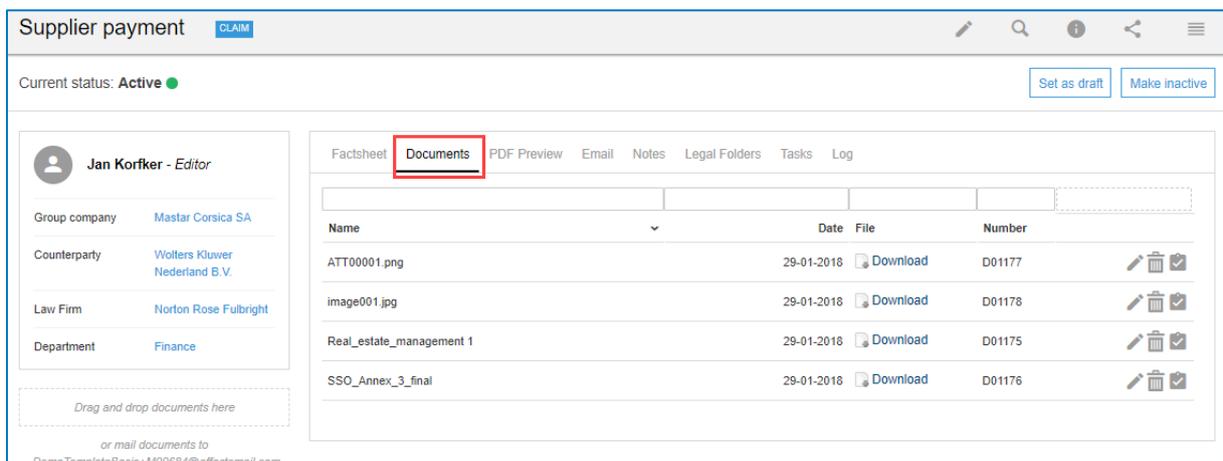


Figure 13: Create a document

- Dossiers: Pre-defined text containing the agreement to where the document will be created
- Name: Name of the document
- Date: Date of when the contract/ agreement in the file was signed. (Or upload date of the file attached)
- File: Browse and upload a file to attach it as a document to the contract/ agreement

When finished, click on the [Save] button, the newly created document is visible on the Documents tab (figure 14). Or if you want to upload more documents, click [Save & New] or [Save & Copy]. Click [Cancel] to cancel the creation of a new document.



Name	Date	File	Number	
ATT00001.png	29-01-2018	Download	D01177	  
image001.jpg	29-01-2018	Download	D01178	  
Real_estate_management 1	29-01-2018	Download	D01175	  
SSO_Annex_3_final	29-01-2018	Download	D01176	  

Figure 14: Added document to a dossier

### 5.1.3 PDF preview

If you added some documents to the dossier, it is possible to have a quick look by using the tab PDF preview (figure 15).

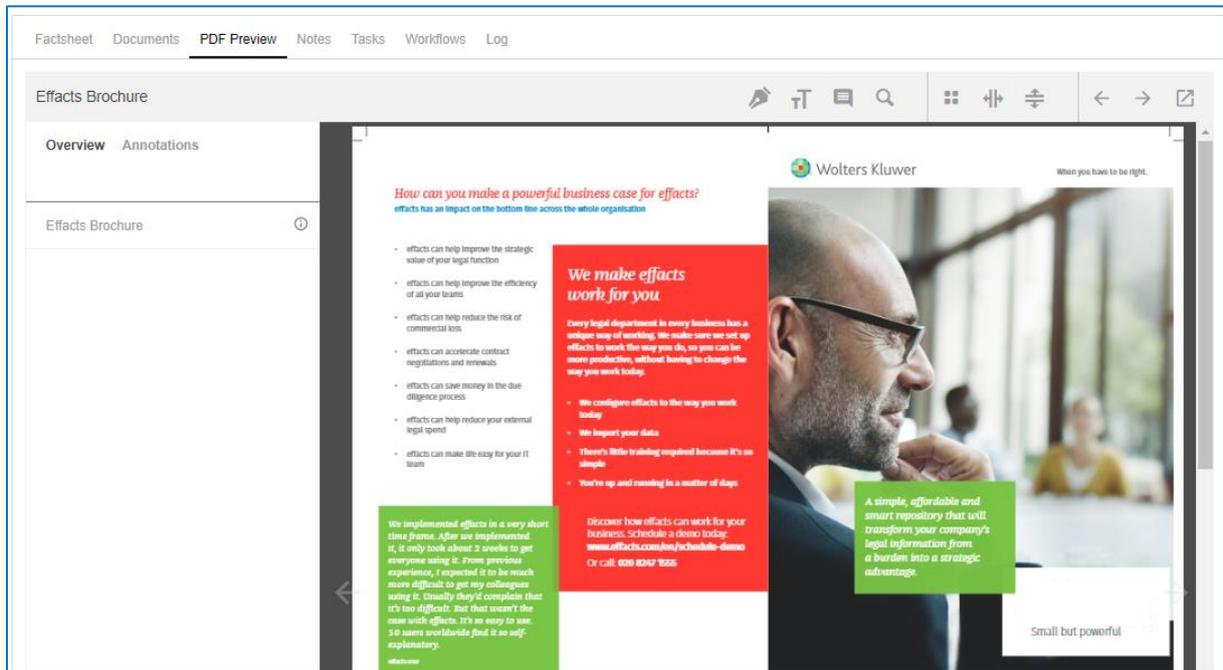


Figure 15: PDF pre-viewer

The PDF preview function offers various navigation buttons and tools, each of them are explained below.



-  Highlight button: Highlight text in the document
-  Typewriter button: add text in the document
-  Annotating button: add a note in the document
-  Search bar: Search keywords in document
-  Multi-page button: Overview of all pages from the document
-  Horizontal double arrows: Document in preview page filling horizontal
-  Vertical double arrows: Document in preview page filling vertical
-  Navigate in document: Navigate to previous or next document
-  Switch viewer mode: PDF preview page filling

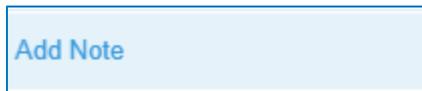
## 5.2 New Task

You can find a detailed manual on how to use the new Tasks and Task Workflows [here](#).

If the Workflow manager is disabled for your system you may contact your consultant or Account Manager to activate this.

## 5.3 New Note

To create a new note, go to any dossier page and click [Add Note] at the right menu of the screen.



Clicking the button will forward you to a 'Create' screen which is quite similar in its functionality to other 'Create' screens in the system. An explanation of each field is given below (figure 16).

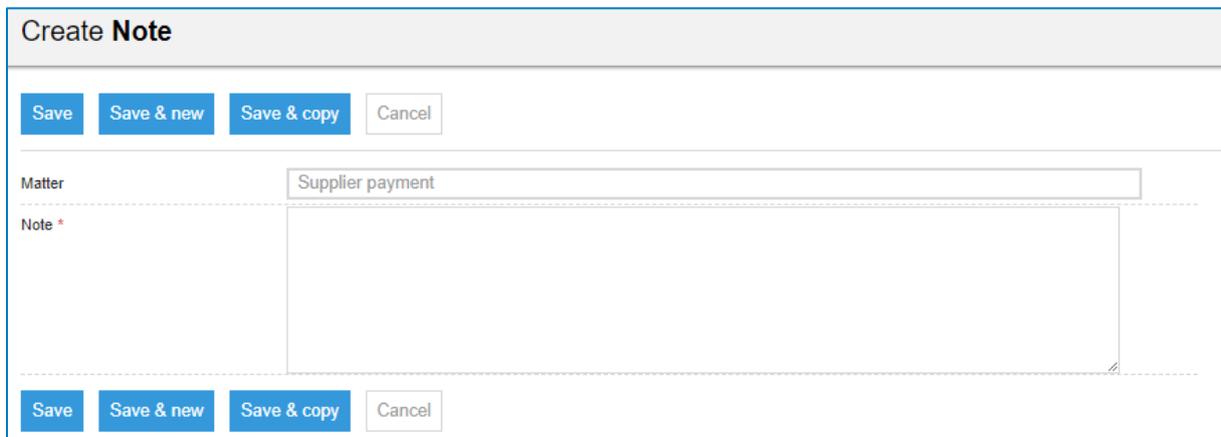
A screenshot of the "Create Note" form. At the top, there's a header "Create Note". Below it are four buttons: "Save", "Save & new", "Save & copy", and "Cancel". The form has two main sections. The first is labeled "Matter" and contains a text input field with "Supplier payment" entered. The second is labeled "Note \*" and is a large, empty text area. At the bottom of the form, there are another set of four buttons: "Save", "Save & new", "Save & copy", and "Cancel".

Figure 16: Create a Note

- Matters: Pre-defined text containing the dossier name to where the note will be created.
- Note: A free text area allowing you to add extensive additional information about the note.

When finished, click on the [Save] button, the newly created note is visible on the 'Notes' tab (figure 17). Or if you want to create more notes, click [Save & New] or [Save & Copy]. Click [Cancel] to cancel the creation of a new note. This feature is more commonly used to give status updates about this dossier. That way anyone navigating to this dossier can track its progress.

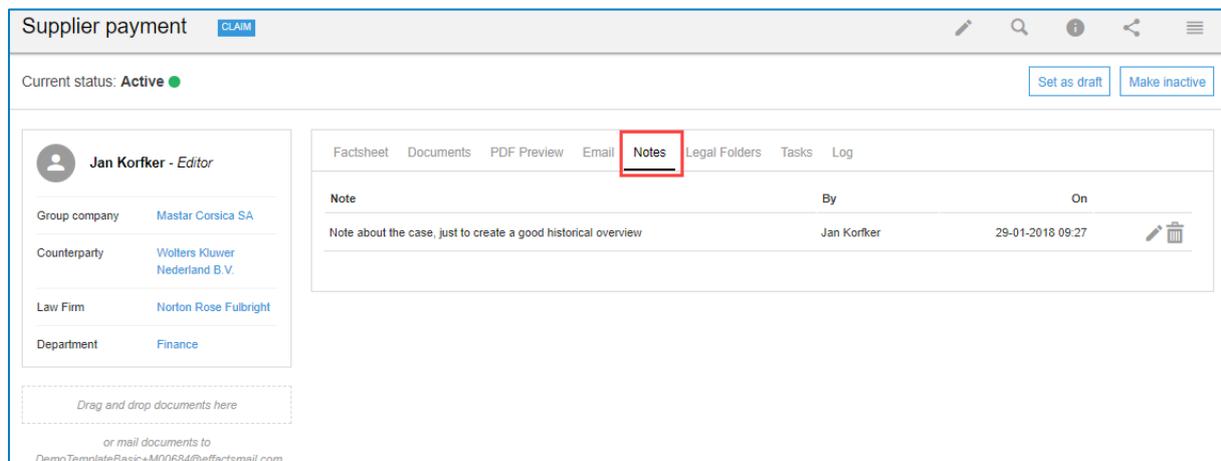
A screenshot of a dossier page for "Supplier payment". The page has a header with the dossier name and a "CLAIM" status. Below the header, there's a "Current status: Active" indicator and two buttons: "Set as draft" and "Make inactive". On the left, there's a profile card for "Jan Korfker - Editor" with details like "Group company: Mastar Corsica SA", "Counterparty: Wollers Kluwer Nederland B.V.", "Law Firm: Norton Rose Fulbright", and "Department: Finance". On the right, there's a navigation menu with tabs: "Factsheet", "Documents", "PDF Preview", "Email", "Notes" (highlighted with a red box), "Legal Folders", "Tasks", and "Log". Below the "Notes" tab, there's a table of notes. The table has columns for "Note", "By", and "On". One note is visible: "Note about the case, just to create a good historical overview" by "Jan Korfker" on "29-01-2018 09:27". At the bottom, there's a "Drag and drop documents here" area and an email address: "DemoTemplateBasic+M00684@effactsmail.com".

Figure 17 : Added notes to a dossier

## 5.4 New Risk

Risks can be added from every Dossier in the same manner by using the “Add Risk” button in the right-hand panel:

The image shows two parts of the user interface. At the top is a light blue rectangular button with the text "Add Risk" in a darker blue font. Below this is a form titled "Create Risk" with a grey header bar. The form contains several fields: "Dossier \*" with a text input containing "Supplier payment"; "Title \*" with an empty text input; "Risk Type \*" with a dropdown menu; "Assessment date \*" with a date input showing "09-02-2018" and a calendar icon; "Risk level \*" with a dropdown menu; and "Mitigating measures" with a large text area. The form is divided into sections by dashed lines. At the top and bottom of the form are buttons: "Save", "Save & new", "Save & copy", and "Cancel".

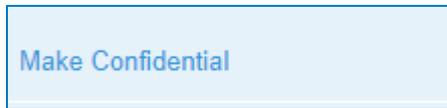
Figure 18: Create a Risk

- Dossier: The Dossier for which the Risk is added. This is filled automatically.
- Title: Give the Risk a short, clear title. This will be shown in reports.
- Risk Type: Select a category for the Risk. As standard, Risks can be Legal, Financial, or Operational.
- Assessment Date: The Date on which the Risk was identified and assessed.
- Risk Level: Attribute a Risk level to the Risk. This determines a priority for it.
- Mitigating Measures: Write out a descriptive explanation of the mitigating measures undertaken.

Once you are done filling in the form, click “Save” to register the Risk. It will appear in reports throughout the system so users can keep track of them.

## 5.5 Make Confidential

Each dossier type can be set as confidential for one or more persons by using the button [Make Confidential] at the right menu of the screen. This can be used as a very flexible way of setting some dossiers aside for those who are not allowed to see.



Clicking the button will show you a notification. If you decide to invite the persons who need access to this dossier, click the [Submit] button (figure 18).

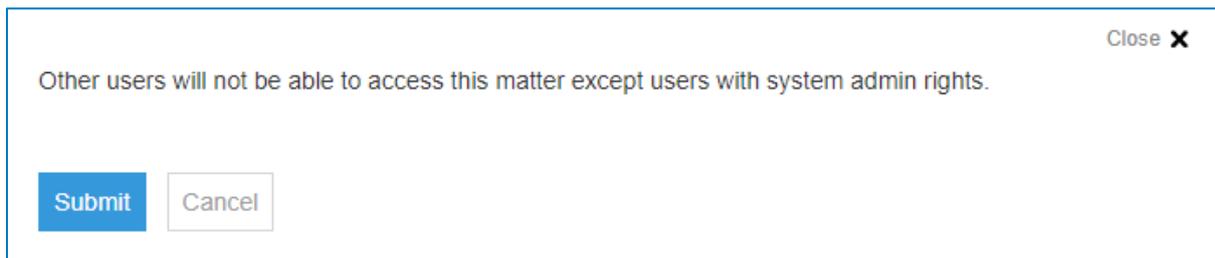


Figure 18: Notification after making a dossier confidential

To invite users, go to the dossier page and click [Invite Users as viewer] at the right menu of the screen. Clicking the button will forward you to a screen in which you can select or search a person(s) to invite to this confidential item (figure 19).

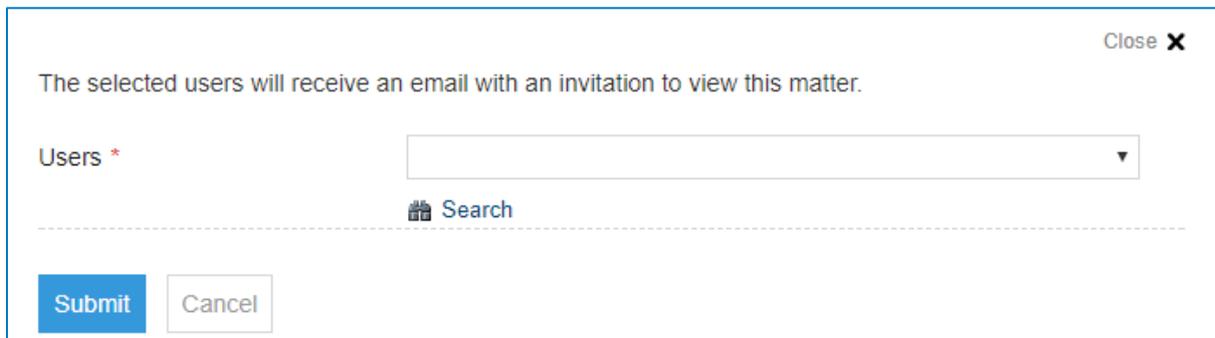


Figure 19: Invite users to a confidential dossier

Select the persons who may see this dossier.

When finished, click the [Submit] button. The person will receive an invitation automatically by e-mail to view the dossier. Clicking the button [View dossier] will redirect the user to the dossier.

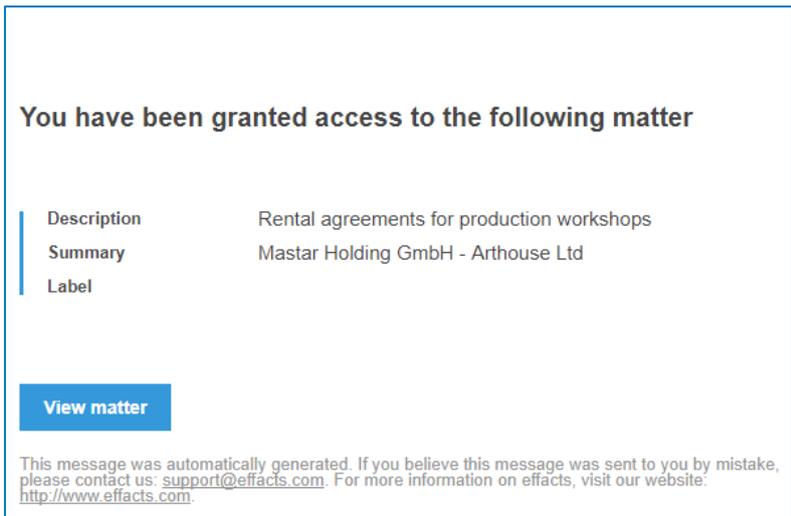


Figure 20: Email that is sent to users allowed to see a confidential dossier

A new field, “Confidential” appears on the left side of the factsheet as well as a tab with the Users who have access to this dossier (figure 21).

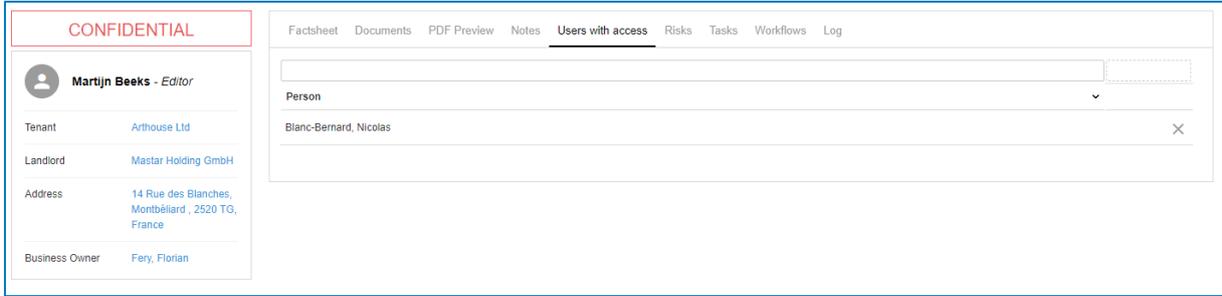


Figure 21: A confidential dossier

**Access:**

Only the Editor responsible and the people who are invited to this dossier will be able to see it. The responsible Editor is now the one who can manage data for this file or dossier. Therefore, all other invitees can track its progress. The big exception however is the person(s) with the Editor+ Admin role. Users with this role can always see the confidential items and can change the confidential status.

**How to change the confidential status:**

If, for some reason, one of the users may not view the dossier anymore, the responsible Editor can decide to remove the user with access out of the tab (figure 22).

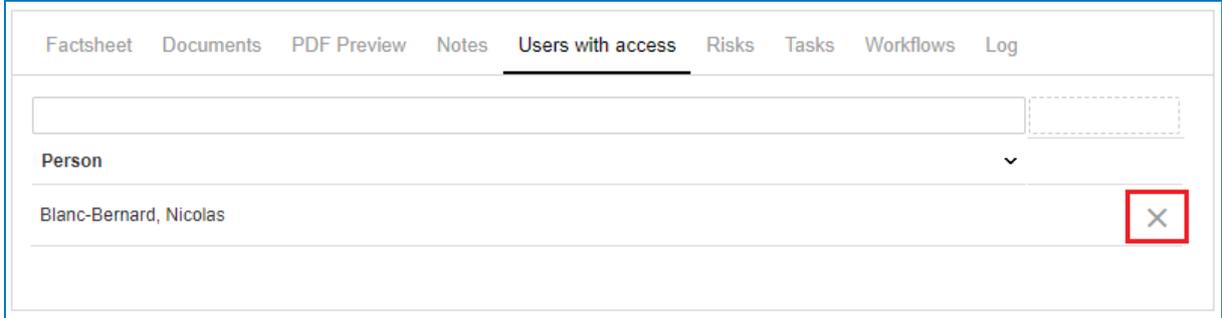
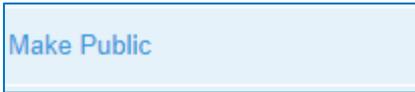


Figure 22: List with users with access to a confidential dossier

If the dossier needs to be accessible for everyone, the responsible Editor can decide to make this dossier public by clicking [Make Public] at the right menu of the screen.



Clicking this button will display a screen like the picture below (figure 23).

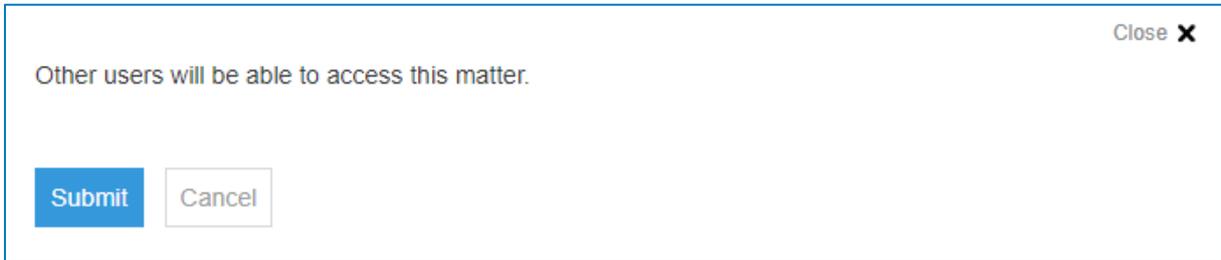


Figure 23: Notification when making a confidential dossier public

If you are sure about to change the status to public, click the [Submit] button. The dossier can now be viewed by other users. The red confidential text has disappeared.

## 5.6 Invite user as viewer

The [Invite users as viewer] feature can be used on confidential as well as non-confidential dossiers and folders.

The main purpose of this functionality is to allow you to share specific dossiers with others without granting them access to all dossiers of the type. Situations might occur where this feature could be useful:

**E.G.** Through Access Control, administrators have assigned access rights based on modules (e.g. contracts) or matter types (e.g. sales agreement). Ideally, a sales colleague should have been granted access to matter type: sales agreement. Meaning, he/she will be able to view all sales agreements if no additional limitations have been set. However, if it is an IT-related sales agreement, we might want to grant an IT-colleague access to that specific agreement without granting access to all sales agreement.

In another example, users might want to grant access to a matter (one specific non-disclosure agreement) without granting access to all matters (all non-disclosure agreements). In order to do so, administrators and editors can invite additional users as viewers. As a result, colleagues can follow the progress and developments of important matters when needed.

In your Legisway Essentials environment, please navigate to a specific dossier and click on [Invite users as viewers]:

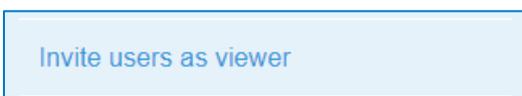
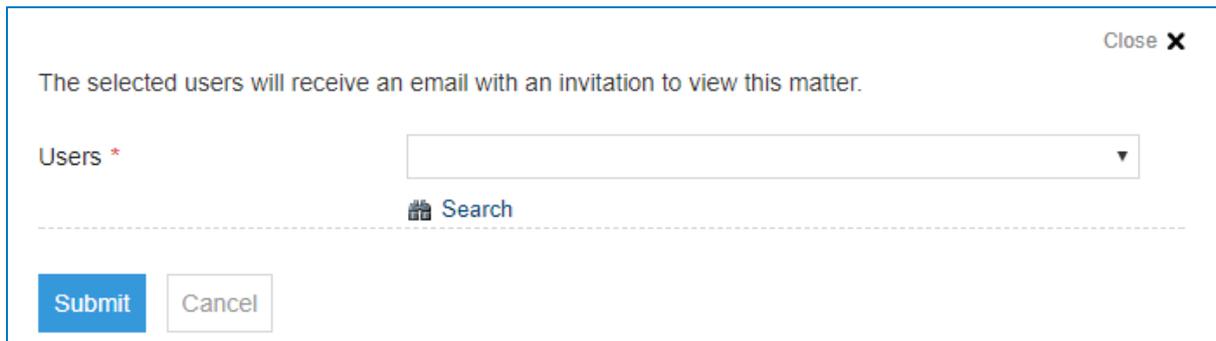


Figure 24: Invite users as viewer button

In the next screen, you will be able to search for specific users and select them accordingly. When finished, click on the submit button:



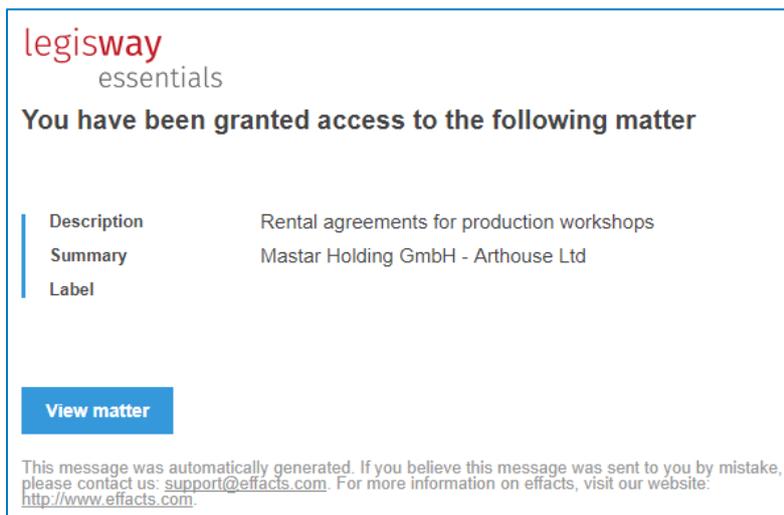
The selected users will receive an email with an invitation to view this matter.

Users \*

Close X

Figure 25: User selection screen

Subsequently, the invited user will receive an email notification that will direct them to the dossier:



legisway  
essentials

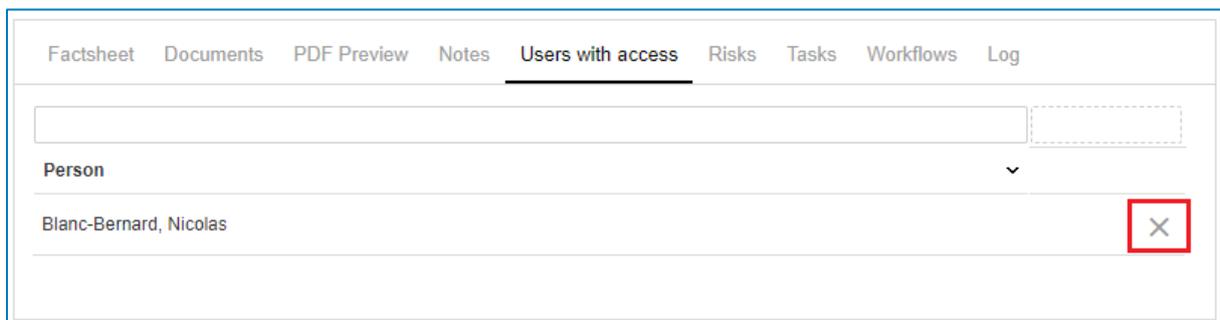
**You have been granted access to the following matter**

Description	Rental agreements for production workshops
Summary	Mastar Holding GmbH - Arthouse Ltd
Label	

This message was automatically generated. If you believe this message was sent to you by mistake, please contact us: [support@effacts.com](mailto:support@effacts.com). For more information on effacts, visit our website: <http://www.effacts.com>.

Figure 26: email notification to invited user

Ultimately, a new tab will appear on the dossier [Users with access] that provides an overview of all invited users. Within this tab, you can also revoke the access rights by simply clicking the cross button.



Factsheet Documents PDF Preview Notes **Users with access** Risks Tasks Workflows Log

Person

Blanc-Bernard, Nicolas

Figure 26: Users with access overview

Important to note; once access rights have been revoked, users will be notified by another email notification that they no longer can access the dossier.

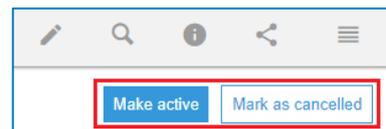
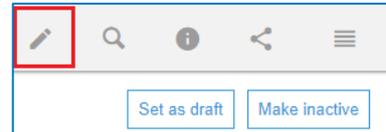
## 6 Managing a dossier

After reading this chapter you know how to manage a dossier and delete data from your system.

### 6.1 Change the dossier status

Each dossier data will be managed by the Editor of the dossier. He or she is able to:

- Edit information by using the pencil button. When satisfied with the changes, click [Save] to finalize the update. All reports and screens in the system containing this data will automatically be updated.
- Change the status of the dossier:
  - **Set as draft:** For example, if the effective date of the dossier is unknown.
  - **Make Inactive:** If the dossier can be archived.
  - **Make Active:** If all the necessary information within the dossier is presented.
  - **Mark as cancelled:** If the dossier no longer needs to be in the system.



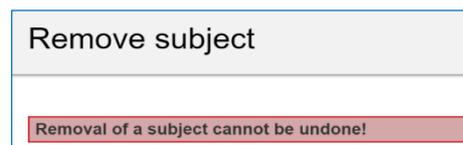
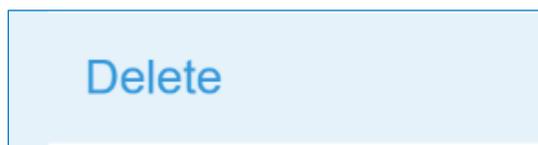
### 6.2 Delete information

When you delete information, no history of the subject remains in the system. Keep in mind that archiving information is preferable in most situations. Only delete information when the information itself was added incorrectly or when the information should not be available ever again.

If a user deletes information from the database it will create a 'hole' in the database information. It is important to note that the retrieval of deleted or missing information can cost upwards of €500 due to how the system is set up, hence why it is best to archive if unsure.

When you are sure about not needing the information again, an explanation about how and when deleting information can be carried out is provided below. For example, if an incorrect contract/ agreement needs to be deleted from the database. Jump to the factsheet that needs to be deleted and choose [Delete] in the menu at the right.

Only the factsheet will be deleted, all other information will still be available in the database such as the previously linked Group company, Counterparty, Department, Documents, Notes, Risks and Tasks. The Legisway Essentials system will always ask a user if they are completely sure about deleting the information in a second screen.



## 7 Standard Reports & Alerts

Not only can you easily search for information within the system, it is also possible to compile important information into one overview, also known as a report. Next to the well-known Custom report button, each dashboard contains some standard reports which are available on the left side of your screen.

### 7.1 Reports

These reports contain valuable information and can be reviewed on the right side of your screen, immediately after clicking one of the buttons. This function is quick and effortless, an explanation of each report is given below.

#### Status Reports:

##### **Report 1, 2, 3, 4: Active, Draft, Inactive, Cancelled**

- An overview of all the Active, Draft, Inactive or Cancelled dossiers within the theme.

#### Overviews:

##### **Report 1: Added <30 days**

- An overview containing all Dossiers added within the last month.

##### **Report 2: Due < 90 days**

- An overview containing all Dossiers with an expiration or review date in less than 90 days.

##### **Report 3: Open Tasks**

- An overview containing all open tasks related to Dossiers within the theme.

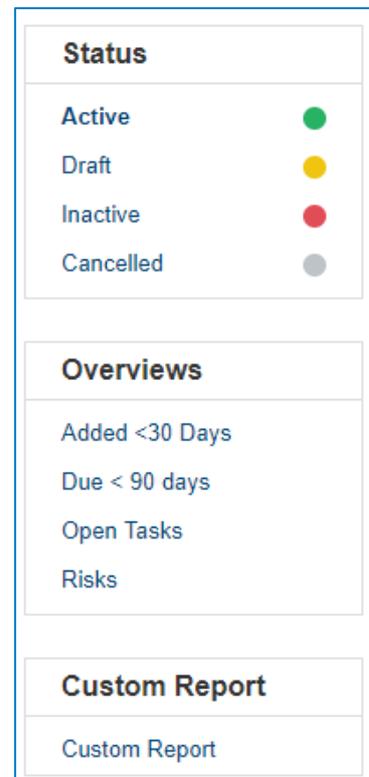
##### **Report 4: Risks**

- An overview containing all Risks related to Dossiers within the theme.

#### Custom Report:

##### **Report 1: Custom Report**

- Use this button if you want to create your own report. You can also use the Personal Reporting feature.



## 7.2 Alerts

One of the powerful functions of Legisway Essentials is the Alert. Alerts are automatically generated email messages to a predefined group of Users on a predefined alert date. For example, a contract/ agreement needs to be reviewed on time otherwise it will expire. Expiration of the contract/ agreement can be avoided by configuring an alert.

The number of times the system will send an alert depends on the configured frequency. For example, a frequency of 30 days means that the system will send an alert to the receivers every month.

A commonly used Alert is the “Claim – Due < 90 days” alert. The example below gives you an explanation on how it works. All alerts work the same way and the field that triggers them is indicated.

### **General example:**

The claim must be reviewed on 31/01/2018. The editor will receive the first Alert mail, 90 days before the review date. This means that if the frequency is set to 30 days, the Editor and Business Owner will receive 3 Alert mails. This e-mail contains the contract or contracts that need to be reviewed (figure 245).

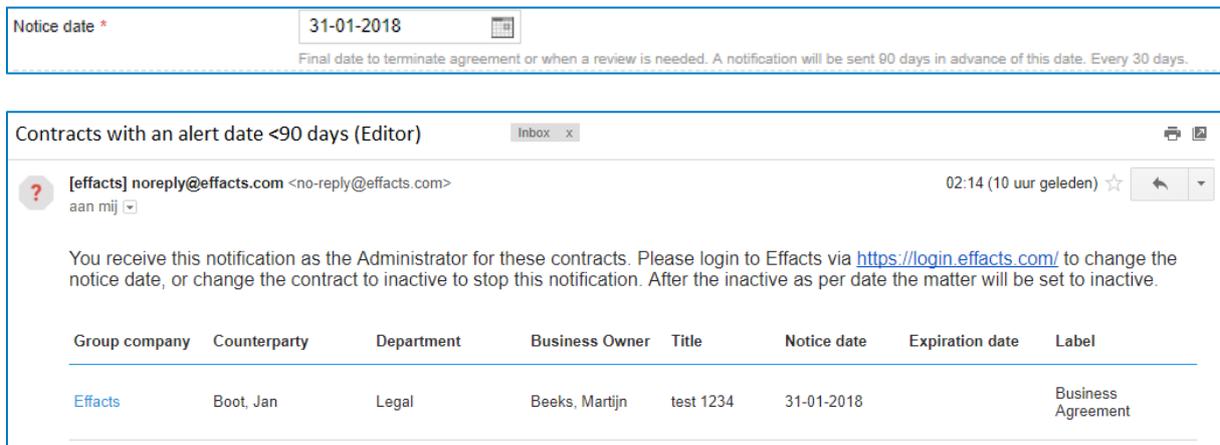


Figure 25: Email with alerts

### **How to stop the Alert mail?**

If you no longer wish to receive an alert, you may stop this notification by simply archiving the contract using the button [Make inactive] (figure 26).

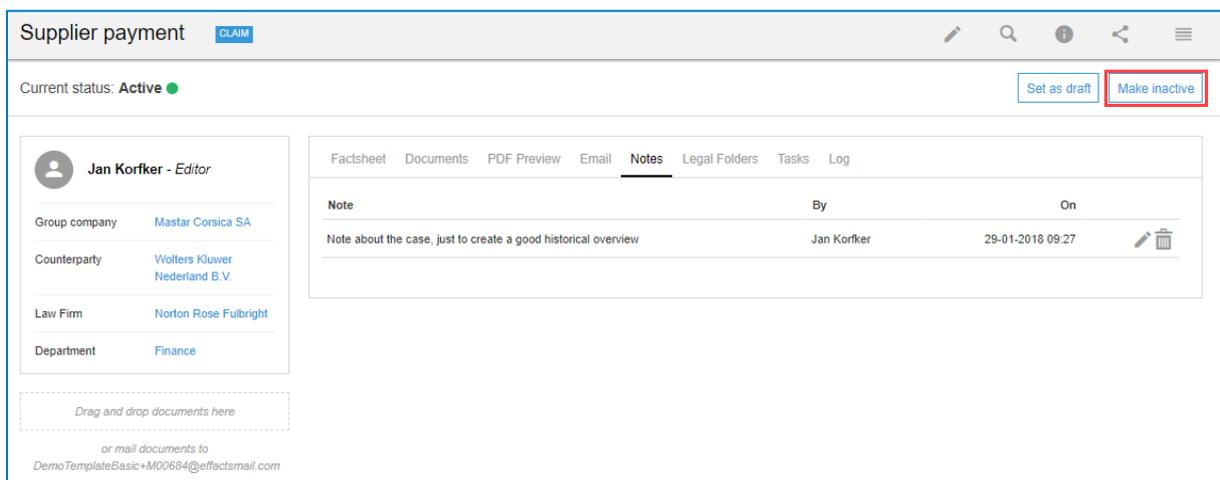


Figure 26: Make a dossier inactive

Clicking the button [Make Inactive] will forward you to a pop-up screen (figure 27). Here you can set the Inactive as of date. If you click the [Submit] button, the contract will be archived automatically.

Close ✕

## Change status

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You are about to change the status to Inactive. Please enter the Inactive Date.

Inactive as of \*  

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Figure 27: Notification when making a dossier inactive