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User Manual

Corporate dossiers

Preface

With this manual, you will gain a basic understanding of the way the Legisway Essentials system is structured and how this affects the way you use it in its entirety. Following this manual in order will allow you to quickly start populating your system with **Corporate** dossiers.

You need to be an Editor or an Administrator to make use of these instructions so 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

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

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



Figure 1 : Legal Management dashboard

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

2 Legisway Essentials Best Practice

Before you can start populating your system, it is important to know that each **Corporate dossier** 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.

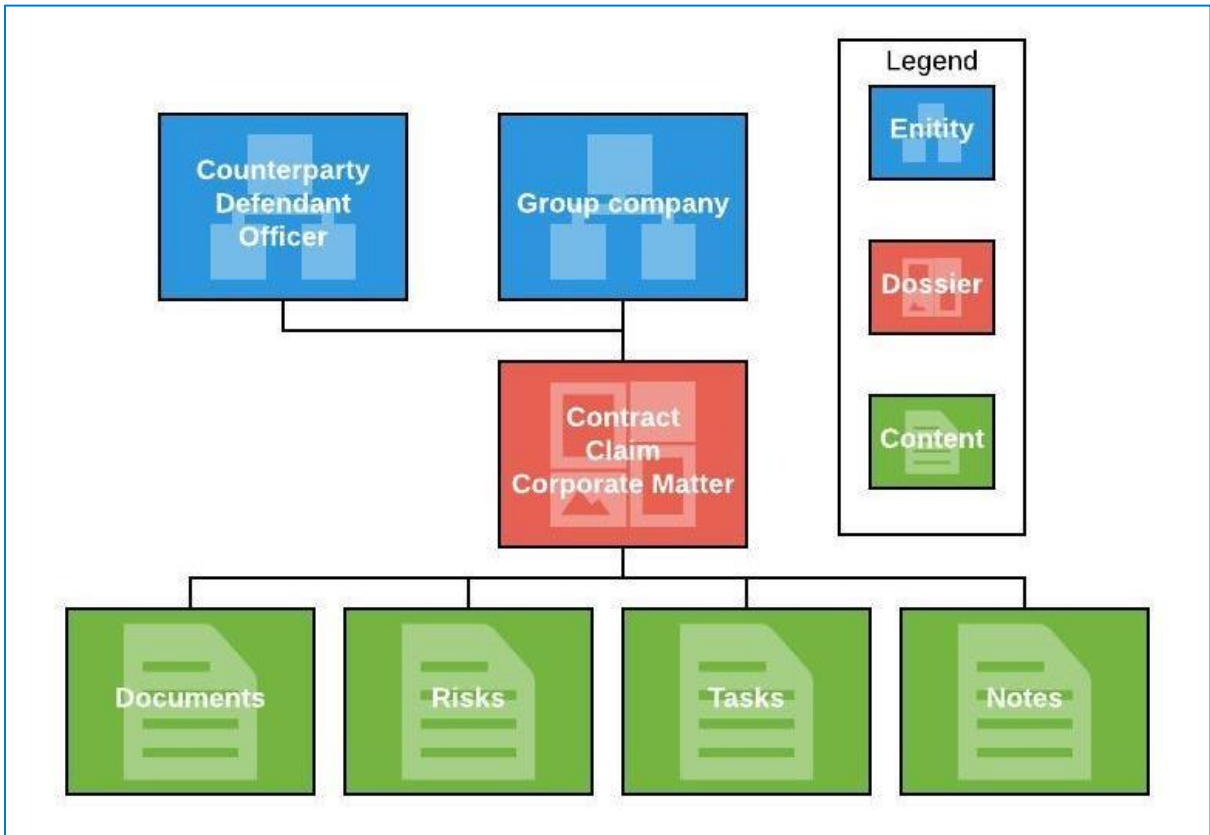


Figure 2: Entity Relation Diagram

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 Corporate dossier type may have subtypes: Appointments, Shareholdings, Business Registrations & Partnerships.

3 Dashboards

This chapter explains the structure of the theme dashboards. In the Corporate theme there are four dossier types: Appointments, Shareholdings, Business Registrations & Partnerships. Your organization could have different roles within these dossier types, for example: a Group company or a Counterparty. This may be modified to suit your needs.

3.1 Corporate Overview dashboard

Selecting the Corporate 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 your and your colleagues' activity.

Label	Corporate	Summary	Effective date	Documents	Last modified on	Last modified by
SHAREHOLDING	Interest of 20,00%	Master Germany GmbH holds 20,00% of Master Holding International Corp	23-01-2018	0	23-01-2018 11:20	Jan Korfker

Figure 3 : Dashboard Corporate

Add Group company

- Redirects the user to a create screen to add a Group Company. Detailed information about adding entities can be found in Master Data manual. [Click here](#)

Overviews

- Added <30 days: A view of dossiers and content that are added in the last 30 days.
- Statistics: Each dashboard lets you track active and past dossiers for all parties involved: Group Companies & Editors.
- Global Map Companies: plots companies on a world map based on their location
- Org Charts: displays org charts of group companies with shareholders and shareholdings.

Corporate 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 **Corporate** the following reports are shown:

- Inactive Officers with active Group companies
- Active Group companies without corporate archive

- Inactive Group companies with active corporate dossiers
- Group companies without shareholders
- Inactive Editors with active corporate dossiers

3.2 Sub-dashboards: Corporate

As shown in the Corporate overview dashboard, there are four sub-dashboards: Appointments, Shareholdings, Business registrations and Partnerships. (figure 4). Each Corporate dashboard is explained below.

3.2.1 Sub-dashboard: Appointments

Group company	Officer	Type	Function	Effective date
Master International Holding B.V.	Wieornma, Sander	Director	COO	05-02-2018
Master International Holding B.V.	Mercurius, Fred	Director	CFO	03-09-2016
Master International B.V.	Mazu, Jacob	Supervisor	Chairman	04-03-2014
Mastar Barcelona S.A.	White, Karin	Director	CEO	09-01-2010
Mastar Belgium BVBA	Allen, Andy	Director	CEO	10-01-2010
Mastar Denmark AB	van Dam, Andre	Director	CEO	11-01-2010
Mastar France S.A.	Thomas, Marie	Director	CEO	12-01-2010
Mastar Germany GmbH	Wright, Hannah	Director	CEO	13-01-2010
Bango Ltd.	Jansen, Gerard	Director	Chief Executive Officer	02-02-2016

Figure 4: Sub-dashboard **Appointments**

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: Shareholdings

Group company	Shareholder	Financial interest	Voting interest	Effective date
Master International Holding B.V.	Mastar Holding GmbH	10,00%	10,00%	10-10-2016
Master International Holding B.V.	Mastar United States Sales Ltd.	5,00%	10,00%	19-11-2016
Master International B.V.	Mastar United States Sales Ltd.	50,00%	60,00%	19-11-2016
Master International B.V.	Master International Holding B.V.	50,00%	40,00%	01-11-2016
Master Netherlands B.V.	Master International Holding B.V.	50,00%		04-11-2016
Master International Holding B.V.	Capitec inc.	10,00%	25,00%	29-03-2017
Mastar United States Sales Ltd.	Wassa B.V.	1,00%		18-06-2017
Mastar United States Sales Ltd.		40,00%	100,00%	19-11-2016
Mastar United States Sales Ltd.		60,00%	60,00%	19-11-2016
Wassa B.V.	Master International B.V.	1,00%		18-06-2017

Figure 5: Sub-dashboard **Shareholdings**

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 Overview reports. From here, you can view dossiers with financial or voting interest ≥50%, 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.

3.2.3 Sub-dashboard: Business Registrations

Appointments Shareholdings **Business Registrations** Partnerships

Home > Corporate > Corporate - Appointments > Corporate - Shareholdings

Corporate - Business Registrations Set this dashboard as my homepage

New Business registration 1

Status

Active ●
Draft ●
Inactive ●
Cancelled ●

2

Overviews

Global
USA
Europe
Added <365 days 3
Open tasks
Risks

Custom report 4

Business Registrations

Business Registrations - Active Full display

Total: 2

Group company	Address	Registration type	Number	Effective date
Ebbeling Ltd	Mainstreet 12, Big city, 4895943DF, Andorra	Production Site	7846322	23-01-2018
Mastar Holding	14 Rue des Blanches, Montbéliard, 2520 TG, France	Bureau	2020120	14-02-2018

Figure 6: Sub-dashboard **Business Registrations**

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 this you will see some Overview reports. From here you can view business registrations in a Global map, in a USA map and in a Europe map. You can also view recently added business registrations, 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.

3.2.4 Sub-dashboard: Partnerships

The screenshot displays the 'Partnerships' sub-dashboard. At the top, there are four navigation tiles: 'Appointments', 'Shareholdings', 'Business Registrations', and 'Partnerships' (highlighted with a red border). Below this is a search bar and a navigation breadcrumb: 'Home > Corporate - Appointments > Corporate - Shareholdings > Corporate - Business Registrations'. The main header is 'Corporate - Partnerships' with a 'Set this dashboard as my homepage' link. The dashboard content is divided into several sections:

- Part 1:** A blue 'New Partnership' button.
- Part 2:** A 'Partnerships - Active' section with a 'Full display' link. It shows a table with 2 active partnerships:

Group company	Partner	Type	Effective date
Master International Holding B.V.	Mastar Barcelona S.A.	Limited	22-09-2015
Master Holding	Mastar Guadeloupe SA	Limited	08-02-2018

- Part 3:** 'Overviews' section with links for 'Added <30 days', 'Open tasks', and 'Risks'.
- Part 4:** 'Custom Reports' section with a link for 'Partnerships'.

Figure 7: Sub-dashboard **Partnerships**

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 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.

4 Create and add information

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

The ability to add a new Corporate 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 an Appointment

Navigate to the Appointment dashboard from the Corporate 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 8):

The screenshot shows the 'Create Appointment' form. At the top, there are four buttons: 'Save', 'Save & new', 'Save & copy', and 'Cancel'. Below these are several fields:

- Status ***: Two buttons, 'ACTIVE' (green) and 'DRAFT' (yellow).
- Editor ***: A dropdown menu.
- Group company ***: A dropdown menu.
- Officer ***: A search field with a magnifying glass icon and the text 'Search or create a new subject.' Below it are 'Search' and 'Create' buttons.
- Type ***: A dropdown menu.
- Function ***: A text input field.
- Mandate**: A dropdown menu.
- Specific mandate**: A large text area.
- Renewed on**: A date picker.
- Renewal date**: A date picker with a note: 'The date that the appointment has to be renewed, an alert will be sent 90 days in advance every 30 days'.
- Effective date ***: A date picker with a note: 'Start date. Meaning the date the matter comes into effect.'

At the bottom, there are four buttons: 'Save', 'Save & new', 'Save & copy', and 'Cancel'.

Figure 8: Create an Appointment

- Status: When creating a new dossier, for instance an Appointment, the user can now select if the appointment 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.
- Officer: The person that is appointed. It is able to search this person or to create a new one in the system.
- Type: Pre-defined drop-down list with type options, for example Director, Supervisor, Proxyholder and Other.
- Function: A text field that describes the function of the appointed person
- Mandate: Pre-defined drop-down list with mandate options, for example Solely, Jointly and Limited.
- Specific mandate: A free text area to specify the mandate.
- Renewed on: This the date the appointment is renewed.
- Renewal date: This is the date the appointment has to be renewed. An alert will be sent 90 days in advance every 30 days.
- Effective date (date field): Date on which the appointment took effect.

4.2 Create a Shareholding

Navigate to the Shareholding dashboard from the Corporate 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 9):

Figure 9: Create a **Shareholding**

- Status: When creating a new dossier, for instance a shareholding, the user can now select if the shareholding 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. 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.

- Shareholder : A Group company, an external company or a person that posses shares in the Group company selected in the field above.
- Financial interest : The financial interest of the shareholder in percentages.
- Voting interest : The voting interest of the shareholder in percentages.
- Class and Number : A free text field to specify the Class and Number of applicable shares.
- Effective date (date field): Date on which the shareholding took effect.

4.3 Create a Business Registration

Navigate to the Business Registration dashboard from the Corporate 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):

Figure 10: Create a **Business Registration**

- Status: When creating a new dossier, for instance a Business registration, the user can now select if the business registration 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. 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.
- Address: The Address of the Business Registration. This can be an existing or new address.
- Registration type: Text field that describes the type of registration.
- Number: A text field for a number of the new Business registration
- Expiration date: The date stating the end of term of the business registration.
- Remarks: A free text area allowing you to add extensive additional information
- Effective date: Date on which the business registration took effect.

4.4 Create a Partnership

Navigate to the Partnership dashboard from the Corporate 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 11):

Figure 11: Create a **Partnership**

- **Status:** When creating a new dossier, for instance a partnership, the user can now select if the partnership 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. 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.
- **Partner:** The concerning partner. This can be an existing or a new External company or person in the system.
- **Type:** Pre-defined drop-down list with type options, for example Limited, General and Other.

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).

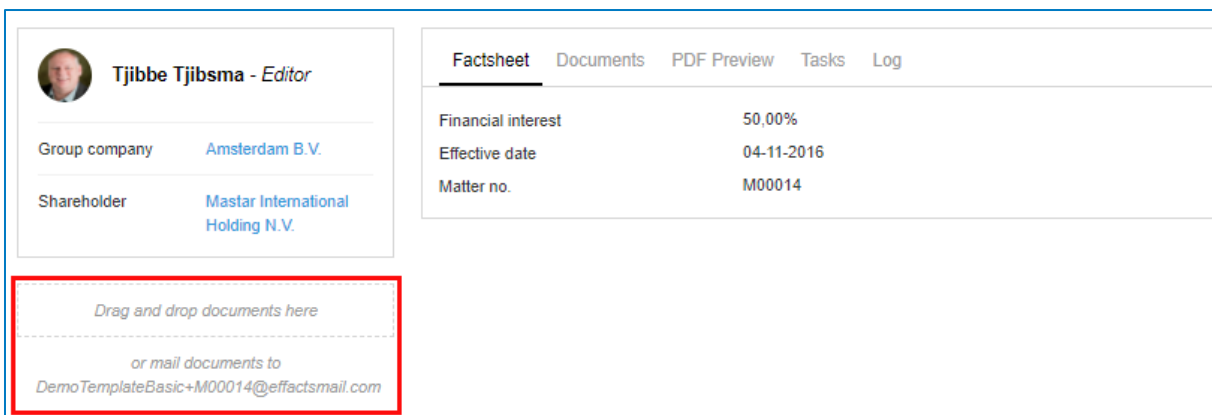


Figure 11 : Add documents to a dossier

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):

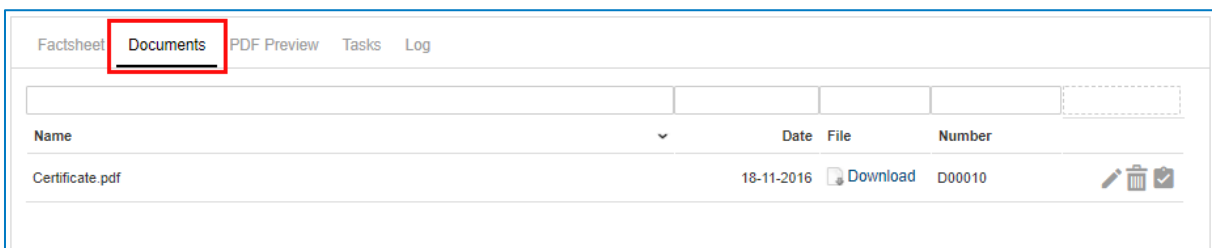


Figure 12: Added document to a dossier

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.

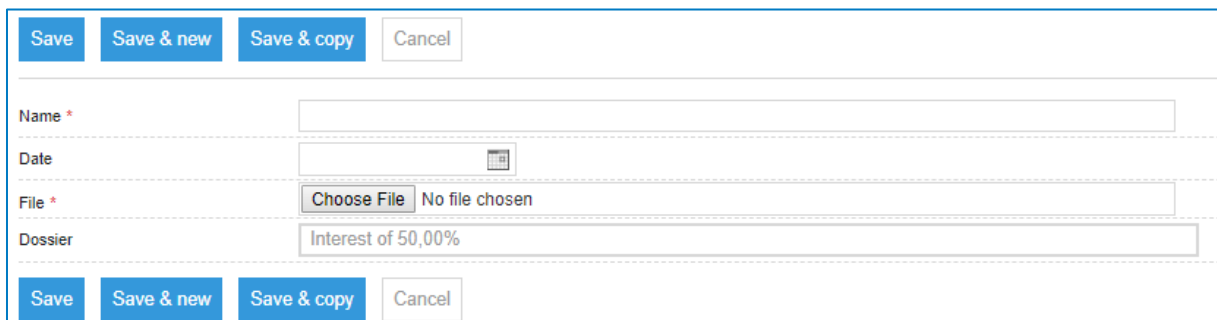


Figure 13: Create a document

- 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.

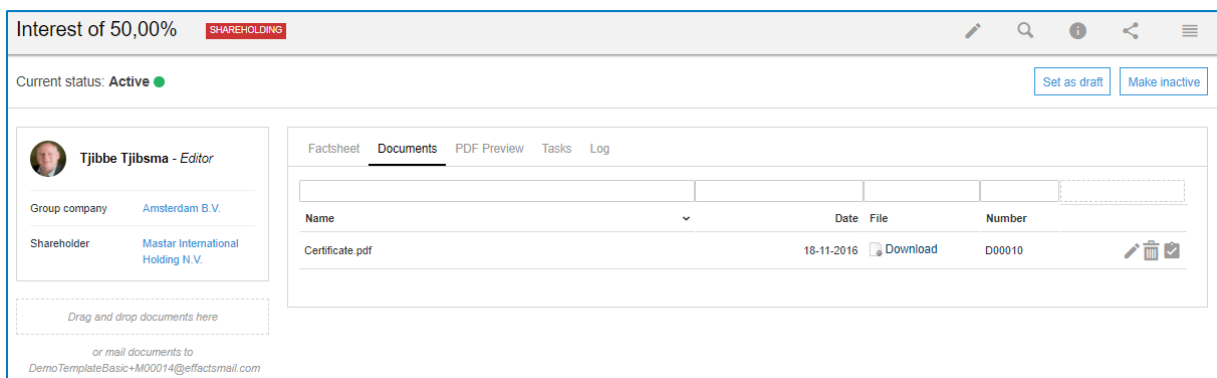


Figure 14: Added document to a dossier

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).

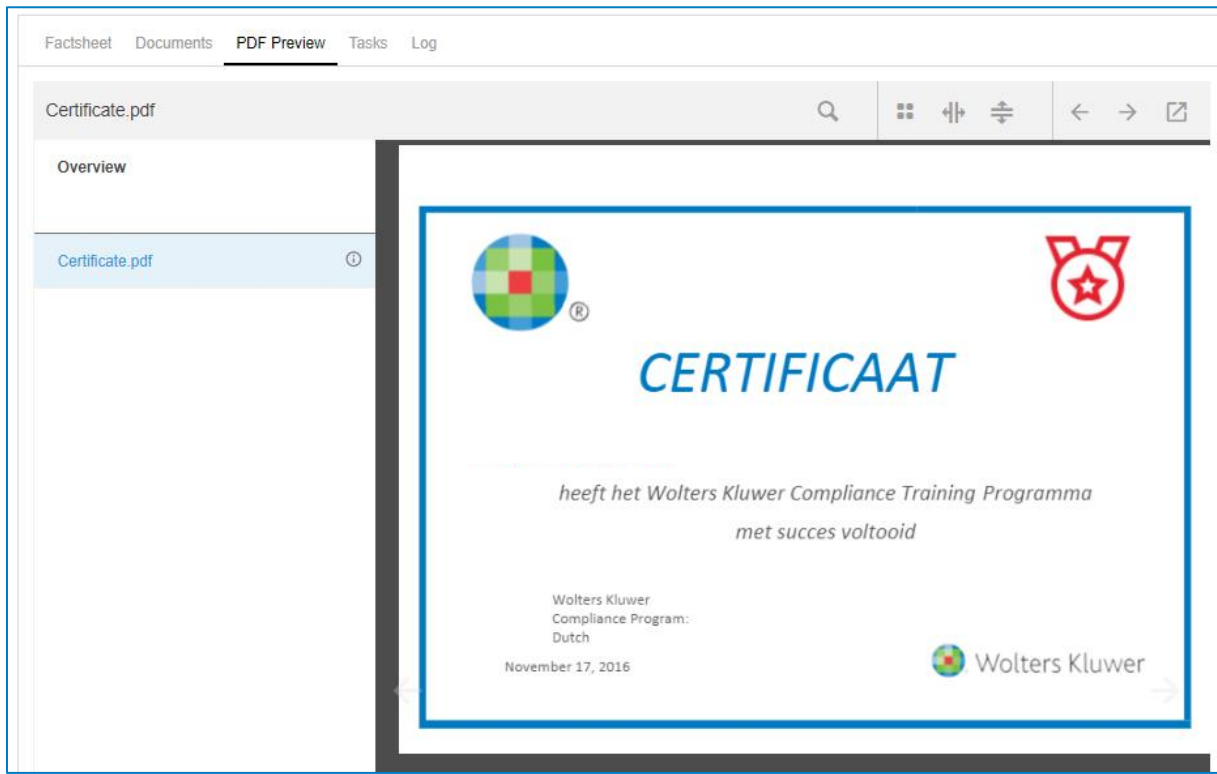











Figure 15: PDF pre-viewer

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

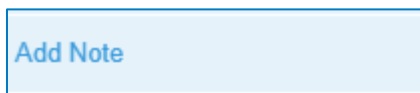
5.2 New Task

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

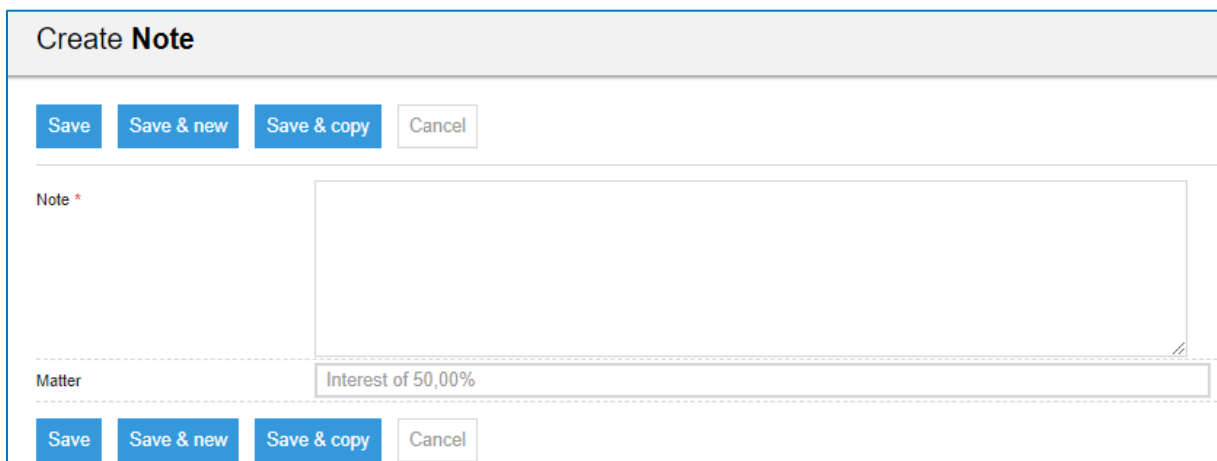
It could be that the Workflow manager is disabled for your system. Please contact your consultant or Account manager to Activate this.

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).

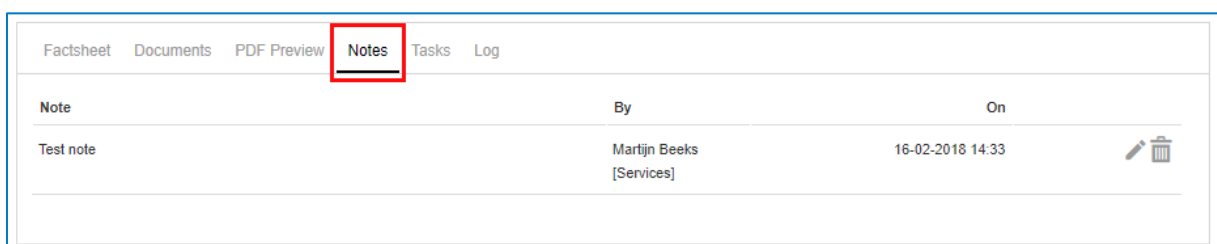
A screenshot of the "Create Note" form. The form has a title bar "Create Note" and two sets of buttons: "Save", "Save & new", "Save & copy", and "Cancel". The main area contains a "Note *" field (a large text area) and a "Matter" field (a text input) containing "Interest of 50,00%".

Note *	Matter
	Interest of 50,00%

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 the "Notes" tab in a dossier page. The "Notes" tab is highlighted with a red box. Below the tabs is a table showing a list of notes.



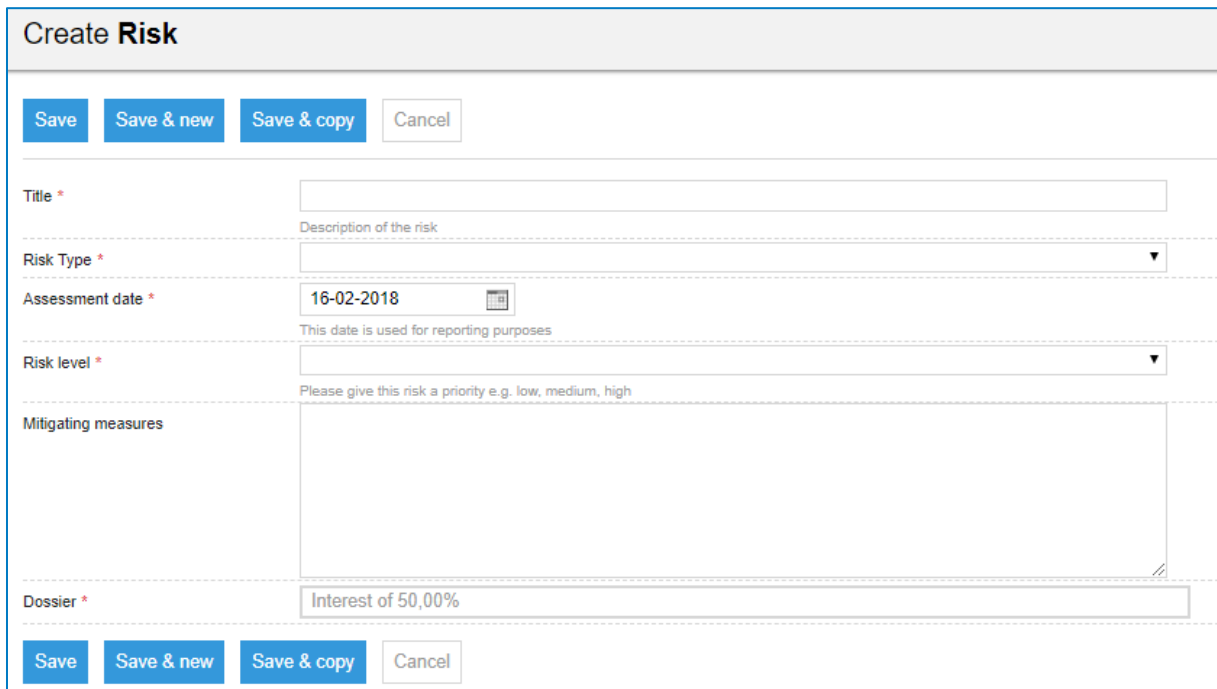
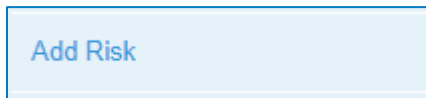
Note	By	On	
Test note	Martijn Beeks [Services]	16-02-2018 14:33	 

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:

A screenshot of a web form titled "Create Risk". The form has a grey header bar with the title. Below the header, there are four buttons: "Save", "Save & new", "Save & copy", and "Cancel". The form fields are: "Title *" (text input), "Risk Type *" (dropdown menu), "Assessment date *" (date picker showing "16-02-2018"), "Risk level *" (dropdown menu), "Mitigating measures" (text area), and "Dossier *" (text input showing "Interest of 50,00%"). There are also "Save", "Save & new", "Save & copy", and "Cancel" buttons at the bottom of the form.

Create Risk

Save Save & new Save & copy Cancel

Title *

Description of the risk

Risk Type *

Assessment date * 16-02-2018

This date is used for reporting purposes

Risk level *

Please give this risk a priority e.g. low, medium, high

Mitigating measures

Dossier * Interest of 50,00%

Save Save & new Save & copy Cancel

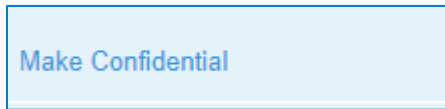
Figure 18: Create a Risk

- 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).

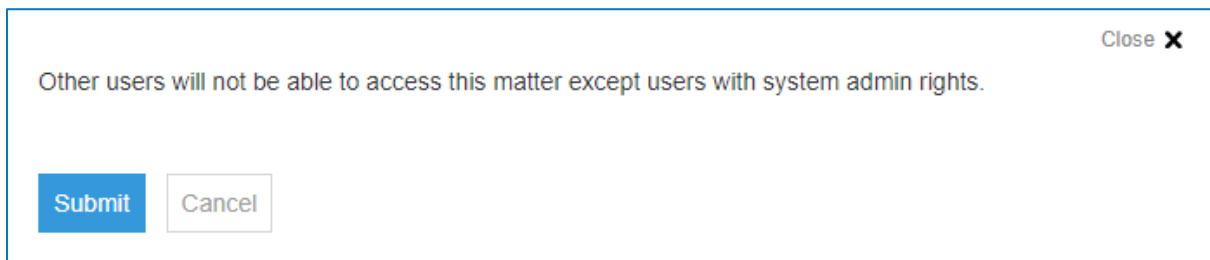


Figure 18: Notification after making a dossier confidential

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).

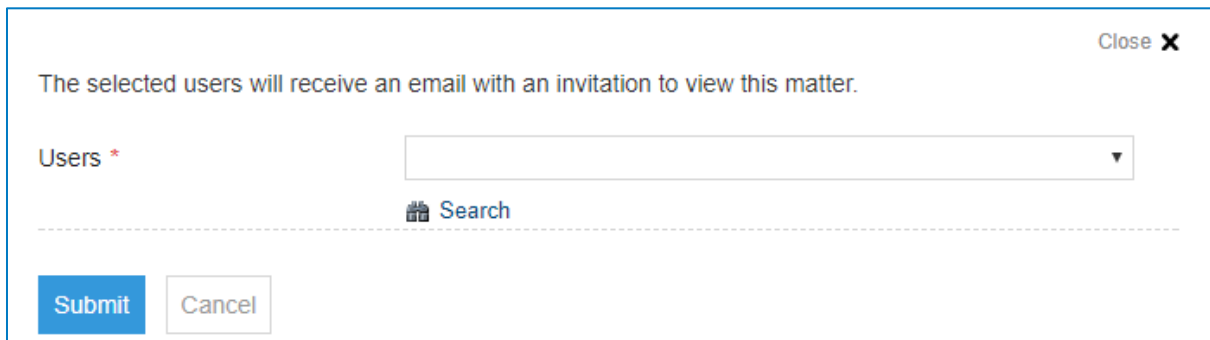
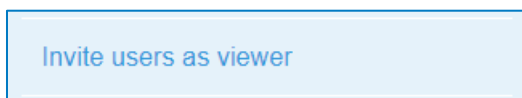


Figure 19: Invite users to a confidential dossier

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.

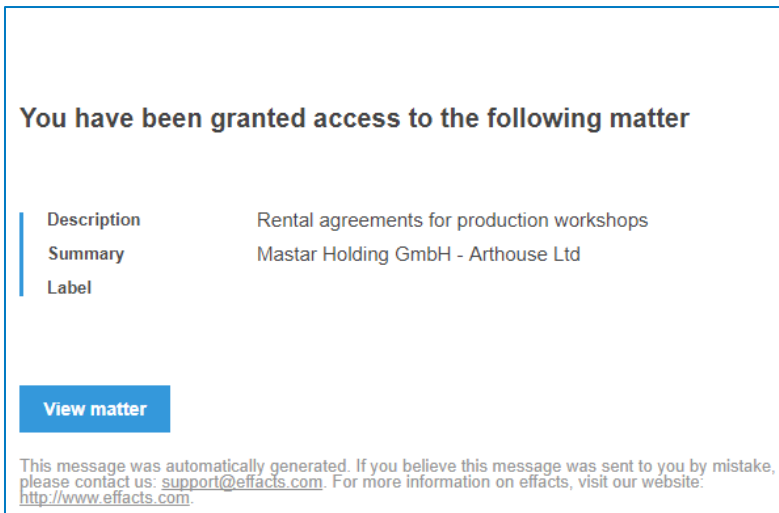


Figure 20: Email that is sent to users allowed to see a confidential dossier

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).

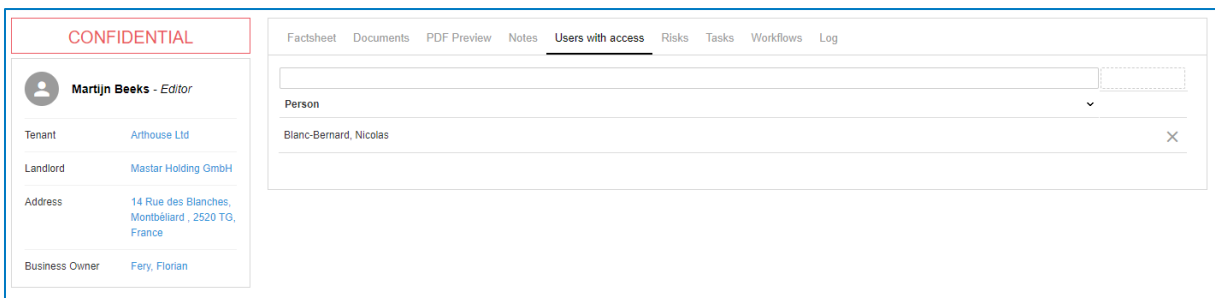


Figure 21: A confidential dossier

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).

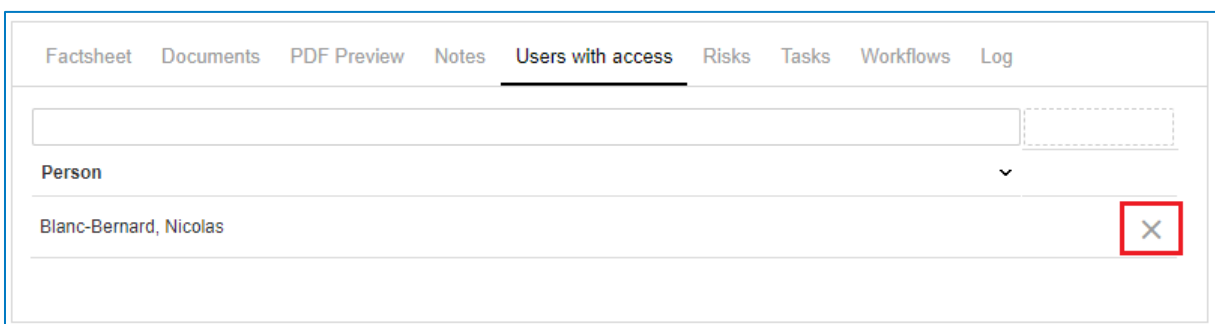
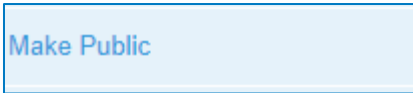


Figure 22: List with users with access to a confidential dossier

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).

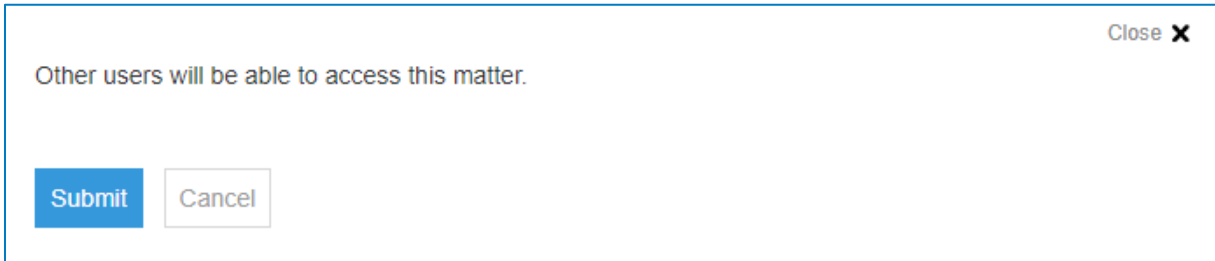


Figure 23: Notification when making a confidential dossier public

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]:

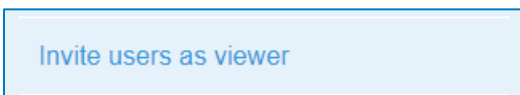
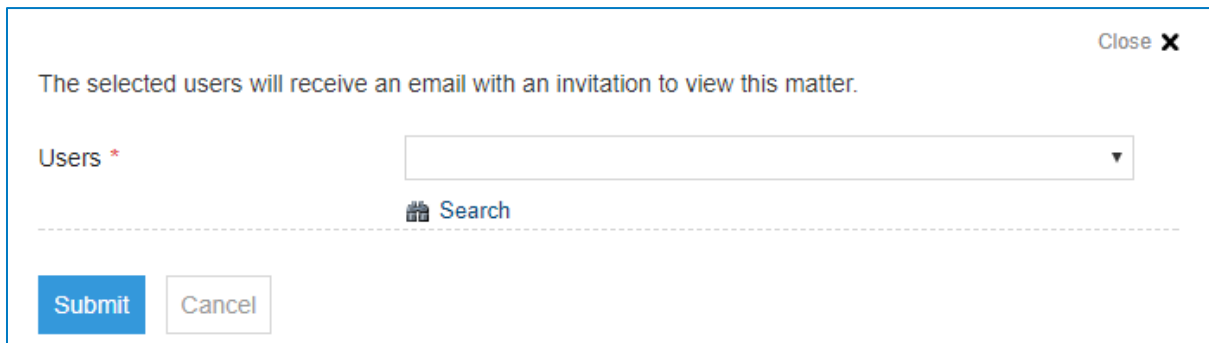


Figure 24: Invite users as viewer button

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



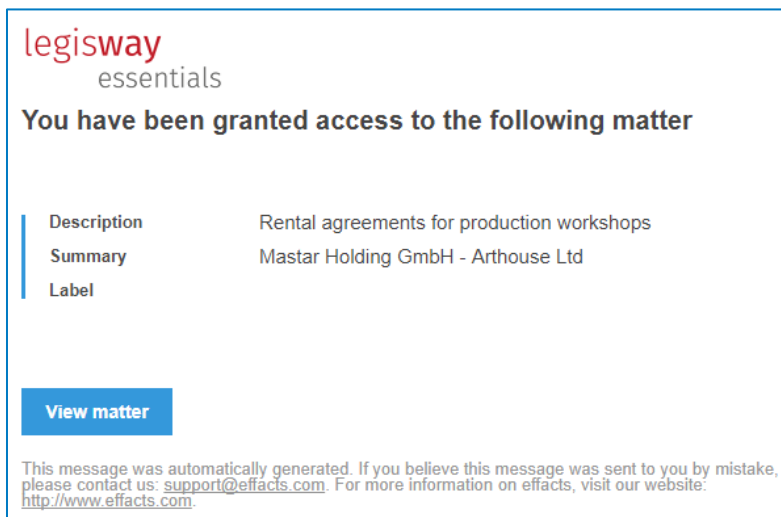
The selected users will receive an email with an invitation to view this matter.

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

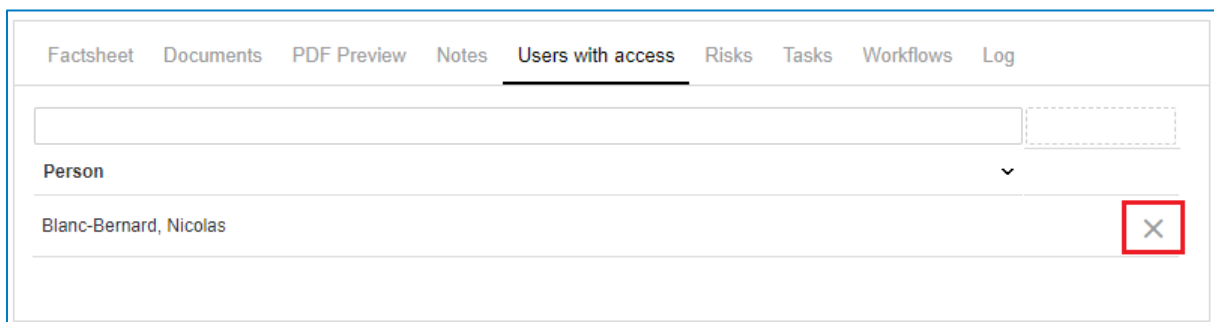
You have been granted access to the following matter

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. 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.

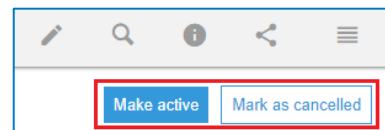
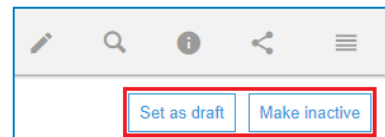
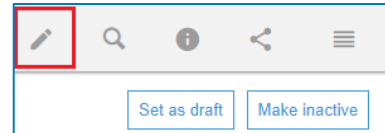
6 Managing a dossier

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.



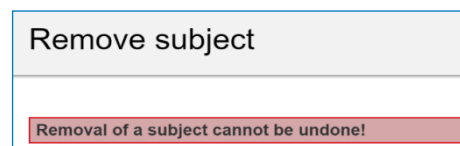
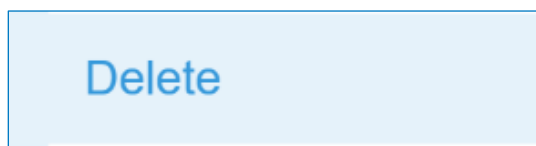
6.2 Delete information

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, you can also 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 functionality works very quickly and effortlessly, 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.

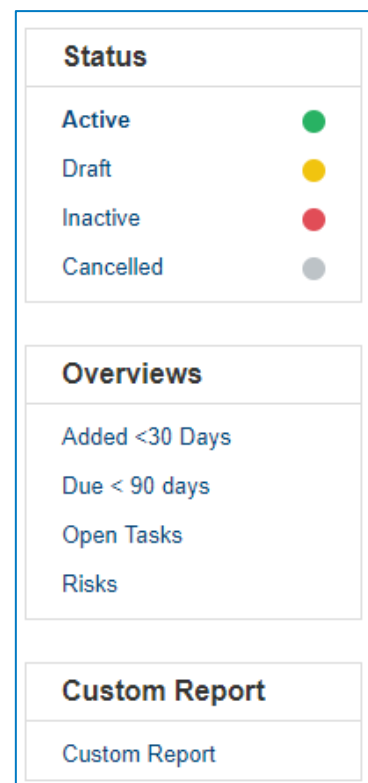
Report 4: Risks

- 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 within 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 your contract/ agreement 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 “Contract with an alert date <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.

Example:

The contract(s) 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 25).

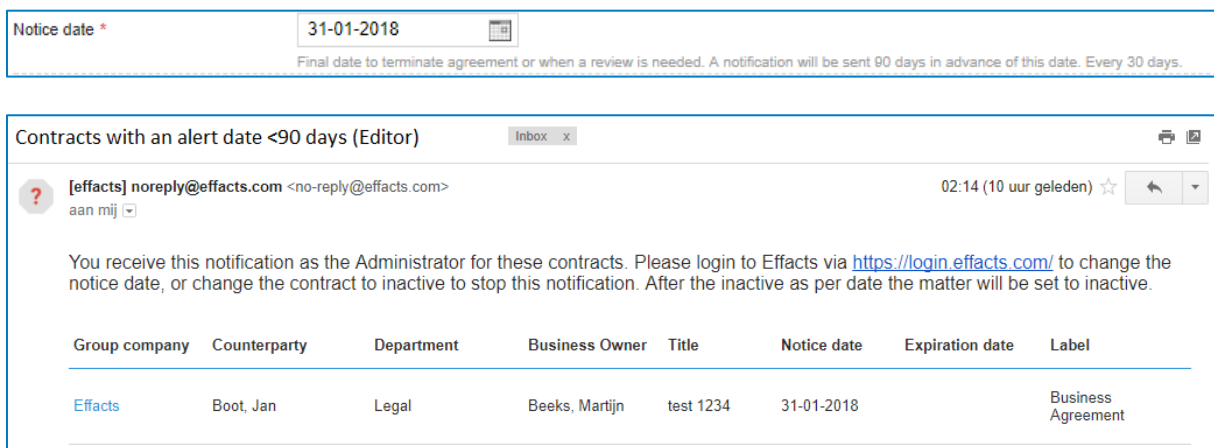


Figure 25: Email with alerts

How to stop the Alert mail?

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

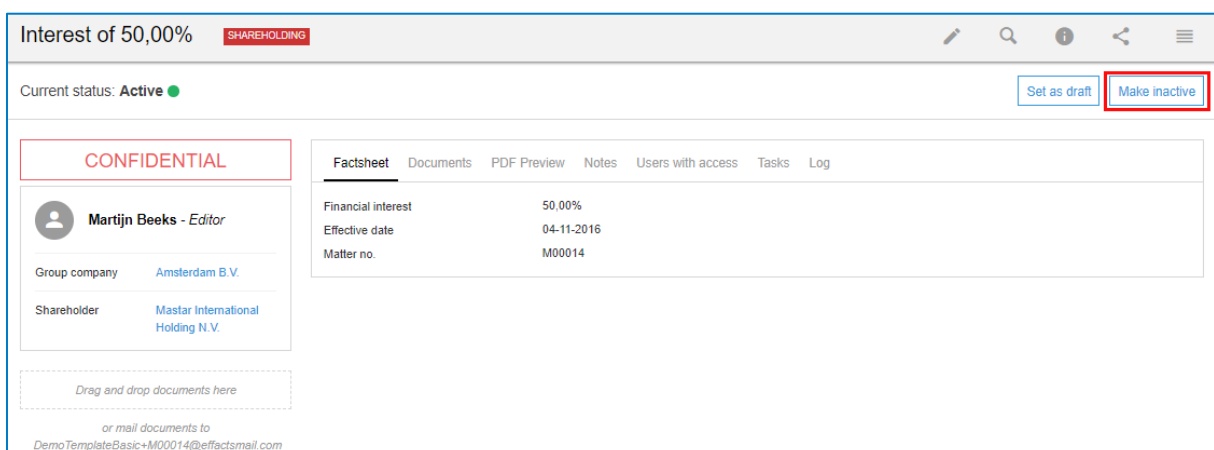


Figure 26: Make a dossier inactive

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 at the button [Submit], the contract will be archived automatically.

Close ✕

Change status

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

Inactive as of *

Figure 27: Notification when making a dossier inactive