



**LAW  
MASTER<sup>®</sup>**

Law Practice Technology

# LawMaster Cabinets

Version: V2.0

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Upgrade.

A MASTRIN CREATION

## Document Revisions

The following table lists all the updates made in the document from its previous version.

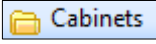
Version Number	Owner	Updates
V0.1	AXP	Initial Draft
V1.0	AXP	First release
V2.0	AXP	Revised and updated per Estonia Release changes

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# Overview

A cabinet is a multi-item, linked storage container. Cabinets provide a user a way to group related documents existing in LawMaster, for example file notes, personnel files, library material, reports, deeds, and Emails. You can also create a cabinet related to a particular matter.

Cabinets may be viewed from the Cabinets icon  on the Lawyer’s toolbar, as well as from the Matter toolbar where a Cabinet can be allocated to a matter.

## Notes:

- ❖ The user may only view Cabinets and Cabinet Items that have the same *Security Class* as that defined in their User Security settings.
- ❖ Folio attachments in a Cabinet are not primarily associated with the cabinet, they will maintain their original association (matter, entity, etc.), while being “linked” to the cabinet. If a folio containing multiple attachments is added to a cabinet, all of the attachments in the folio will be added to the cabinet.

# Cabinet Screen

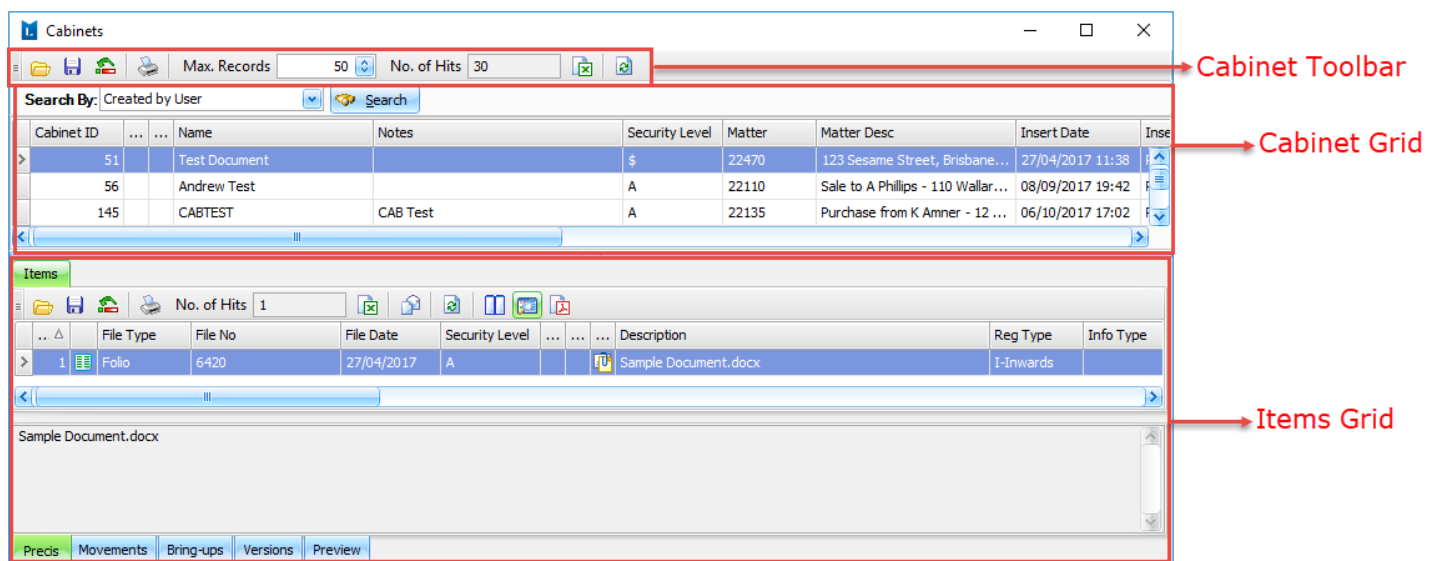


Figure 1: Cabinet screen

Cabinets may be viewed via the following [Search By](#) methods:

- ❖ **Matter** – Matter Number that the Cabinet has been allocated to.
- ❖ **Id** – Cabinet identification allocated by LawMaster at the time of creation.

- ❖ Name – User defined name for Cabinet.
- ❖ Created by User (default view).

## Cabinet Toolbar

The Cabinet toolbar is located at the top of the Cabinet screen.

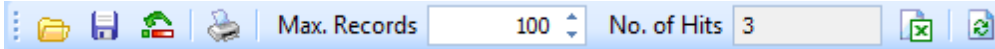


Figure 2: Cabinet Tool bar

This toolbar contains the usual grid toolbar icons that include:

- ❖ Load Layout - Will load a saved layout.
- ❖ Save Grid Layout - Allows saving the current grid layout for loading at later use.
- ❖ Restore to Default - Will restore the default system grid view.
- ❖ Print - Will print the grid as displayed, including groupings.
- ❖ Max. Records – Maximum number of records that the grid is currently displaying. You can change this number as required to load more records in the current grid.  
Note: You will need to hit the refresh button after altering the maximum records number.
- ❖ No. of hits - Number of hits in the grid and the maximum number of records being displayed.

## Cabinet Grid

The Cabinet grid displays all the cabinets filtered based on the [Search By](#) option. By default, displays the cabinets created by the logged in user.

Cabinet ID	...	...	Name	Notes	Security Level	Matter	Matter Desc	Insert Date	Inserted By
>	1242		CS External Training Docs - A...		A	27773	LawMaster - Knowledge Base...	10/11/2016 15:47	AXP
	1243		Style Guide		A	27773	LawMaster - Knowledge Base...	10/11/2016 15:50	AXP
	1245		CS Work In Progress - AXP		A	27773	LawMaster - Knowledge Base...	16/11/2016 09:16	AXP

Figure 3: Cabinet grid

The context menu options on this grid are as following:

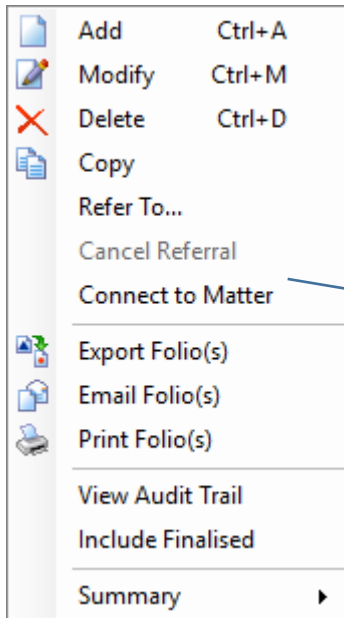


Figure 4: Cabinet Context menu

- *Add*: See [Adding a Cabinet record](#).
- *Modify*: Modify the existing cabinet.
- *Delete*: Deletes a cabinet record upon confirmation.
- *Copy*: Allows you to copy a cabinet to another matter.
- *Refer To*: See [Referring a Cabinet](#).
- *Cancel Referral*: Cancels the previous referral of Cabinet upon confirmation.
- *Connect to Matter*: Opens the Matter associated with the Cabinet, if any. This option is not available when viewing Cabinets from within a Matter.
- *Export Folio(s)*: See [Exporting a Cabinet](#).
- *Email Folio(s)*: Output documents in selected Cabinet and opens Send Email screen with documents attached.
- *Print Folio(s)*: Prints documents in selected Cabinet.
- *View Audit Trail*: Shows the change log history of the selected Cabinet.
- *Include Finalised*: By default, Cabinets, which have been finalised, will not appear in any search. Selecting this option allows to display the finalised Cabinets in the grid.
- *Summary*: Provides the standard grid options of grouping or adding a footer to the grid /groups.

## Adding a Cabinet Record

You can add a Cabinet record by clicking the 'Add' option on the context menu of the Cabinets grid.

Figure 5: Add Cabinet screen

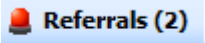
Field	Description
ID	System assigned cabinet identification number.
Name	Name of the cabinet
Notes	Details of information to be stored in Cabinet. This field is used to populate the Folio Precis for Cabinet output. <a href="#">Cabinets context Menu</a> → <a href="#">Output Documents to File(s)</a> .
Matter	Associated Matter number.
Security level	Cabinets have their own security level in the same manner as Folios and other records in the system. If the security level is left blank when adding or modifying a Cabinet, it will match the security level of any Matter it is associated with, or if not associated with a Matter it will default to security level 'A'.

Note: 'Hidden Items' column on the Cabinets grid indicate if there are documents in the selected Cabinet, which the user does not have security to view.

Field	Description
Finalised	Cabinets may be finalised by selecting Modify and ticking the checkbox 'Finalised'. By default, Cabinets which have been finalised will not appear in any search.

## Referring a Cabinet/Cabinet items

Referrals are a quick way to communicate documents internally between staff. For referring an entire Cabinet or Cabinet items, click on the 'Refer to' option on the context menu of the Cabinets grid/Items grid, as applicable.

Once the user has completed the File Referral screen, and referred the folio to the relevant user(s) within LawMaster, an Alert will appear on the recipient(s) tool Bar .

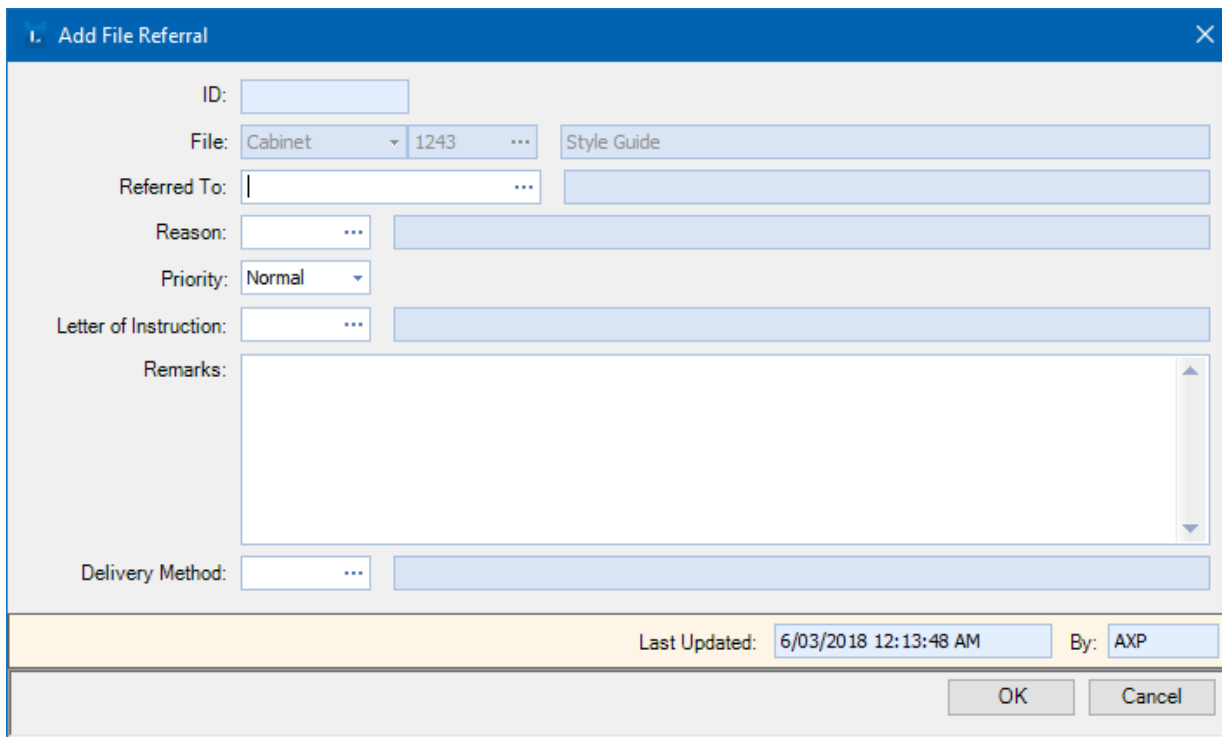


Figure 6: Add File Referral screen



Field	Description
ID	System assigned referral identification number.
File	Auto filled with the Cabinet that you selected to refer.
Referred To	Select the LawMaster users that you want to refer the Cabinet to.
Reason	Select the reason indicated in the 'RR' parameter.
Priority	Low, Normal or High priority.



Field	Description
Letter of Instruction	Link to a Folio detailing instructions for the referral.
Remarks	Free text details for the referral.
Delivery method	Method of referral sending; controlled by the Referral Delivery Method (REFI parameter).

## Exporting a Cabinet/Combining Cabinet

You can export the documents in a selected Cabinet by clicking the 'Export Folio(s)' option on the context menu of the Cabinets grid.

Before you combine the folios in a Cabinet, you may like to arrange the order in which they are listed in the grid. When you combine these documents into one, they will combine in the order they are listed in the Items grid. You can right-click on the documents and move their order using the Up  and Down  arrows. After setting the order, you can save it to appear in the same order the next time you access the Cabinet.

To export and combine the documents:

1. On **Cabinets**, highlight the cabinet whose files you want to combine.
2. Right-click and select the **Export Folio(s)** option. The **Export Folio(s)** dialog box appears.
3. Fill in the necessary fields. See the below table for the fields and their descriptions.
4. Click **OK** when complete.

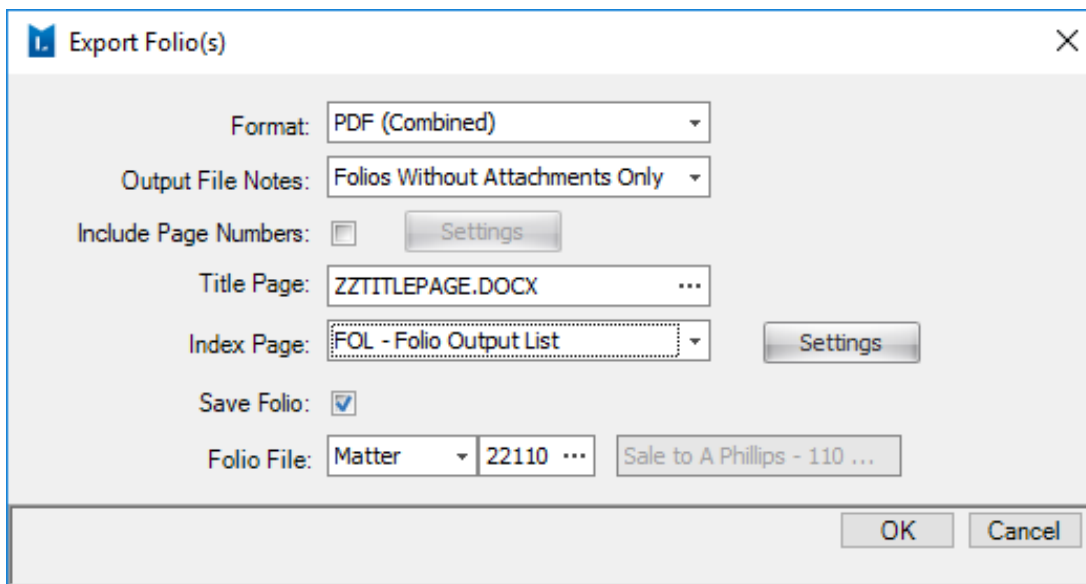


Figure 7: Export Folio(s) screen

Field	Description
Format	<p>Outputs documents in selected Cabinet in the following formats:</p> <ul style="list-style-type: none"> <li>❖ Original – Document are exported in the original file format, docx, jpg, etc.</li> <li>❖ PDF - Where possible, converts the files to PDF.</li> <li>❖ PDF (Combined) - A "published", single PDF combining all documents into one. Documents will be placed in the same sequence they appear in the Cabinet Items grid or File Referrals tree. This means it is possible to sort on any of the various columns in these views to determine the output sequence.</li> </ul>
Output File Notes	<ul style="list-style-type: none"> <li>❖ All Folios - This option will output file notes and Folios with Attachments. The file notes will be merged using the MFN Form.</li> <li>❖ Folios without Attachments only - This option will output file notes only and will be merged using the MFN Form.</li> <li>❖ None - This option will not output file notes.</li> </ul>
Include Page Numbers	<p>This will include page numbers when outputting a 'Combined PDF'. The adjacent 'Setting' box will be enabled only when this option is checked.</p>

There is also an option to select the format for the page numbering. This can be set as a firm wide default refer to [Parameters → Set Parameters → Records Management → Folio Output Page Numbering](#). The format can also be changed at the time of producing **PDF (Combined)** document via the Settings tab.

When the 'Exclude From Index' check box is selected, the page numbering will commence on the page after the index page. By default, this option is unchecked.

Field	Description
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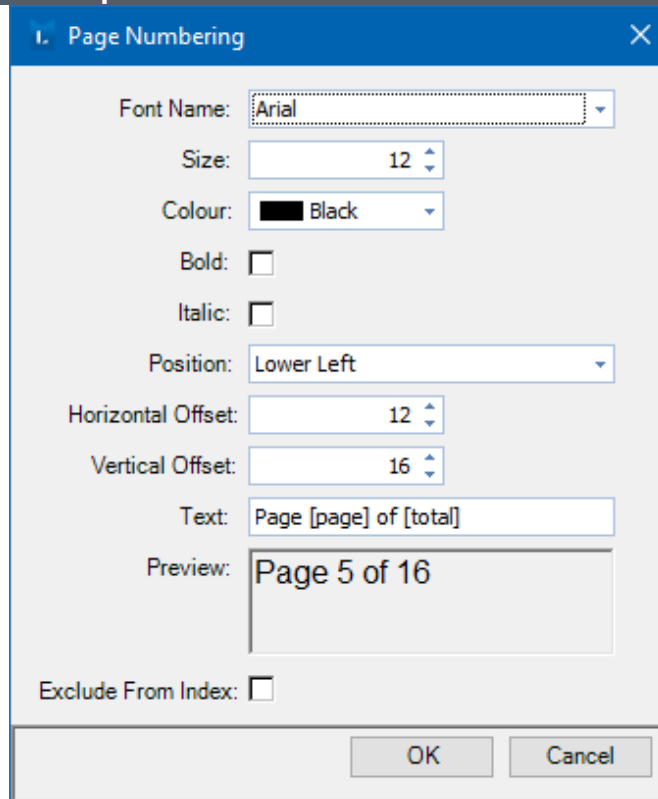


Figure 8: Page Numbering Setting options

Title Page	Allows you to search for the required Document Template. This is inserted at the start of the combined output, or named "TitlePage" if output is not a 'Combined PDF' or a single output (e.g. printing). The title page is not included in page numbering, and is not included in the index page. Note that this applies to all three Cabinet output format options.
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Index Page	On creation of the 'Combined PDF' document, the index page includes page numbers for each cabinet item. On export, the Page Number field will have a hyperlink allowing the user to navigate to a specific document from the Index Page.
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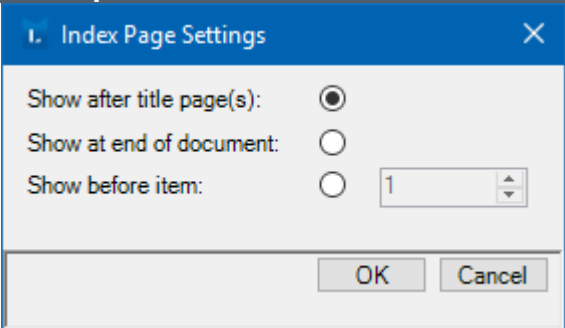
Field	Description
	

Figure 9: Index Page Settings







Save Folio	Select if the 'Combined PDF' is to be saved as a Folio record in LawMaster.
Folio File	File Type and Number to which the Folio record will be saved to within LawMaster.

It may take some time for LawMaster to combine the documents, depending on their size and type. You can see the progress at the bottom of the screen in the light blue task bar.

Once processed, you can access the generated document(s) from the *Folios* of the Matter. You may need to scroll to the top of the list. If you decide to delete the Cabinet, the original documents and combined document(s) will still be in the *Folios* of the matter, where they were originally. The combined document is often used for e-briefs. (for example, **Discoverable** documents if has to be presented as a single document. Usually the cabinet is retained when it is created for this purpose.)

## Cabinet Items Grid

The Items grid contains the documents/folios attached to the selected Cabinet. As per the Folios grid, from the Items grid toolbar, you can:

- ❖ Export the content to Excel .
- ❖ Export the content to Excel and email from within LawMaster .
- ❖ Refresh .
- ❖ Place the Precis/Movements/Bring-ups/Versions/Preview window to side or bottom of the screen by toggling the Horizontal / Vertical Split .
- ❖ Turn on or off the Express Viewer (preview) for Word and Excel by toggling .
- ❖ Turn on or off the Express Viewer for PDF by toggling .

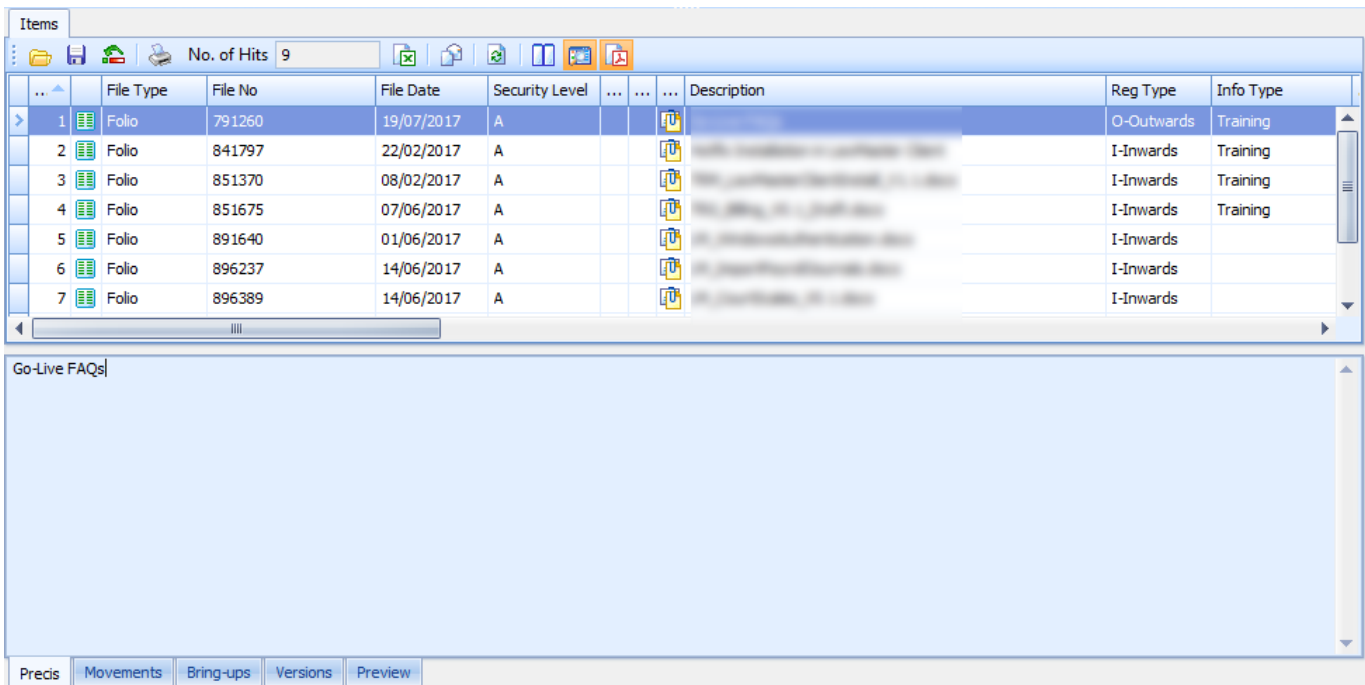


Figure 10: Cabinet Items grid

The context menu options on this grid are as following:

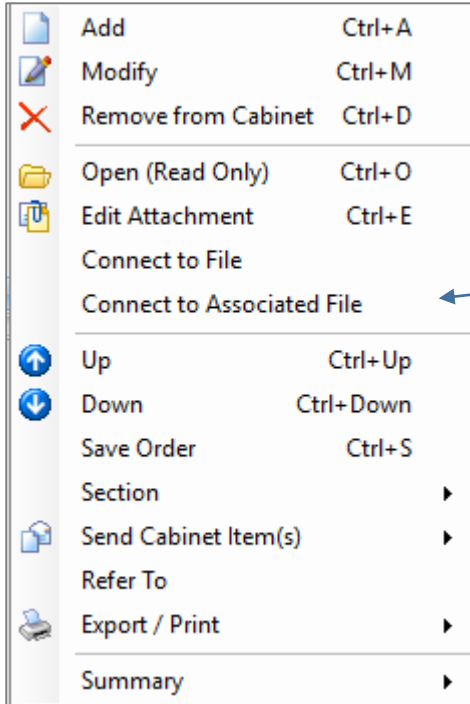


Figure 11: Cabinet Item(s) Context menu

- *Add*: See [Adding a Cabinet Item](#).
- *Modify*: Opens the 'Modify Folio' screen to make any modifications to the selected folio details.
- *Remove from Cabinet*: Removes the selected Item(s) from the Cabinet as long as the Cabinet is not finalised. The system displays a confirmation message to finalise the action.
- *Open (Read Only)*: Allows to review document in Read Only mode.
- *Edit Attachment*: Given that you have the required permissions on the document, enables to edit the existing document. The document will be "checked-out" for editing.
- *Connect to File*: Directs to the Folio record of the selected document.
- *Connect to Associated File*: Directs to the associated file that the document is connected to e.g. Matter, Subject File, etc.
- *Up/Down*: Individual or multiple items can be moved up and down in the list, or with keyboard shortcuts Ctrl + Up and Ctrl + Down.
- *Save Order* – To re-order and save the Cabinet items. Cabinet items will be output in the order they appear in the items grid. Ctrl + S will also save the current order.
- *Section*: See [Sections](#).
- *Send Cabinet Item(s)*: See [Sending Cabinet Item\(s\) Options](#).
- *Refer To*: Refers the selected item(s) to another user for checking/editing purposes. See [Referring a Cabinet Item](#).
- *Export/Print*: See Exporting/Printing Cabinet Item(s).
- *Summary*: Provides the standard grid options of grouping or adding a footer to the grid/groups.

## Adding a Cabinet Item

You can add an item to a Cabinet by clicking the 'Add' option on the context menu of the Cabinet Items grid.

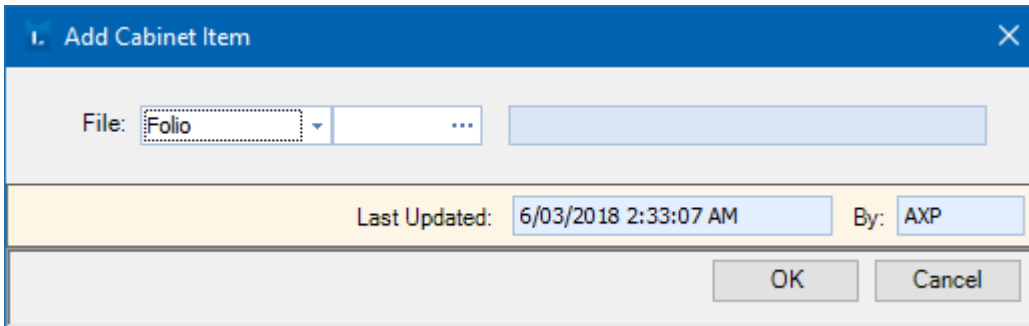


Figure 12: Add Cabinet Item

You can select the Folio to add to the selected Cabinet. This action can be completed only when the Cabinet has not been marked 'Finalised' and does not already contain the document that is being added.

Note: If the Cabinet has been referred to another user, the document being added must be checked-in the system.

## Sections

Sections are groupings that you can create within a Cabinet to categorise your documents/Cabinet Items.

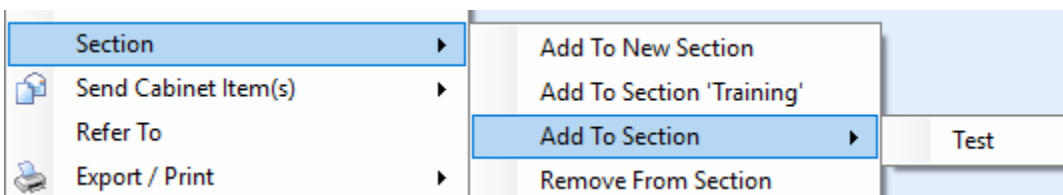


Figure 13: Section Context menu example

- ❖ *Add To New Section:* You can create a new Section within a Cabinet by clicking the 'Section → Add To New Section' option on the context menu of the Cabinet Items grid.

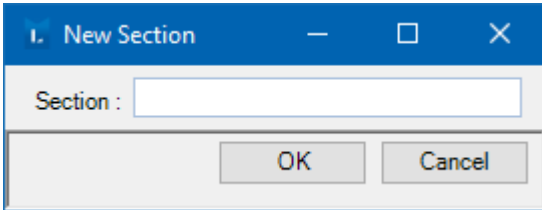


Figure 14: Creating new Section

- ❖ *Add To Section 'Training'*: Where the selected folio has an information type assigned, this menu option will be available, for example, in this case the information type description is 'Training'. On selection, the folio(s) will be added to a Section labelled 'Training'.
- ❖ *Add To Section*: Provides a list of current available Sections; upon selection, the selected folio will be added to that Section.
- ❖ *Remove From Section*: Allows to remove the selected folio(s) from the Section.

## Sending Cabinet Item(s) Options

The [Send Cabinet Item\(s\)](#) context menu option on the Cabinet Items grid allows you to send the selected Cabinet Item(s) via both Email and Fax options. The sub-menu allows you to Send Precis and Attachment, Precis only, or Attachment only for the selected Cabinet Item(s).

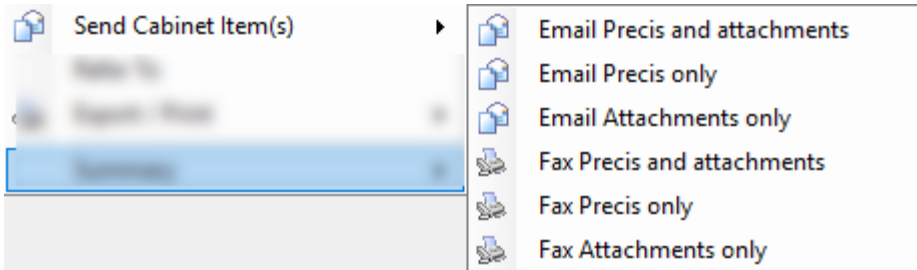


Figure 15: Send Cabinet Item(s) context menu and submenu

- ❖ When an email is to be sent from LawMaster, the system first checks if there are any WORD, RTF, or HTML attachments to the email. The system provides a check box on the email screen to nominate whether the attachment/s are to be sent as a PDF or not.
- ❖ When sending Cabinet Item(s) for a Matter by Fax, the Client's Fax No will be populated in the Recipient list; in the case for an Entity, the Entity's Fax No will be populated in the Recipient list.
- ❖ If the Cabinet Item(s) is to be sent to another Recipient, the user may enter the email address of the Recipient by selecting the Address Book option from the LawMaster ribbon, if using the Outlook Addin. The default recipient list will be Contacts which is a combination of My Contacts for User and Matter Parties of Matter.



## Exporting/Printing Cabinet Item(s)

The [Export/Print](#) context menu option on the Cabinet Items grid allows you to export or print (options) the selected Folio/s to a specified directory.

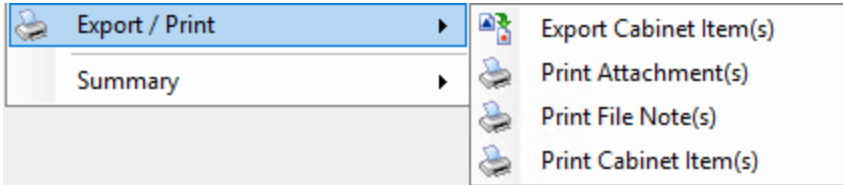


Figure 16: Export / Print Context menu and submenu