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PracticeMaster
Journal Quick Guide

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PracticeMaster Journal Quick Guide

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Quick Guide to Journaling in PracticeMaster

Journaling is one of the most useful features available in PracticeMaster. The journal records provide quick access to case information such as phone conversations, emails, research, time tasks, and notes. You can also search and sort the journals for flexible reporting.

Getting Started

Journaling is an activity that you will become very familiar with. Many of your daily activities can be tracked using journal records. If you need to make a note about a case, you can create a Note journal record. If you have a phone conversation with a client, you can create a Phone Task journal record. If you receive an email from a client, you can save it as an Email journal record. As you can see, journal records are integrated into your everyday activities.

All journal records are stored in the Journal file, though you can access journal records specific to a client through the Client file. Likewise, you can access journal records specific to a contact through the Contact file. The figure above shows an example of the Journal file. On the top panel is the **List** tab, which contains a sortable list of all journal records in PracticeMaster. You can sort the list by clicking on any of the column headers. The **List** tab also includes QuickView tabs at the top of the list, allowing you to quickly change the view. The list in the figure above is sorted by **Client ID**. On the bottom panel of the figure is a SnapShot of the selected journal record. On the right panel of the figure is the Quick Clicks pane, which contains action items for the selected journal record.
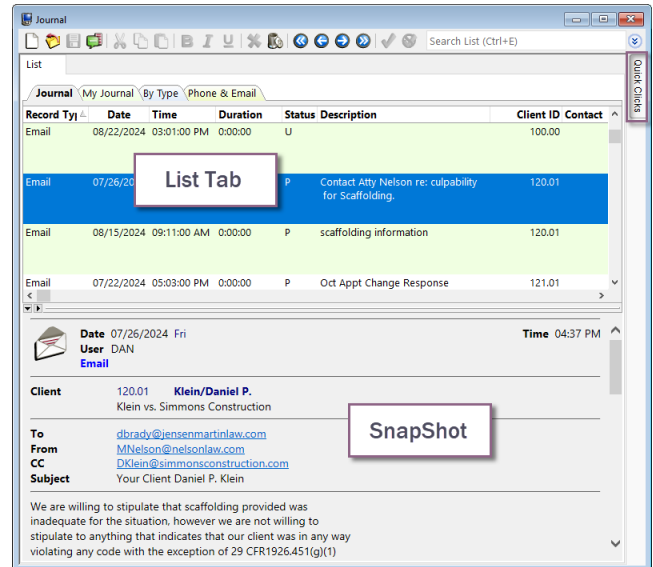
Journaling from the Client and Contact Files

Typically, when creating journal records, you will want to associate them with a particular client or contact. Thus, you can access journal records through the Client and Contact files. From the Client or Contact file, select the desired record in the **List** tab; then navigate to the **Journal** tab. This is where all the journal records are stored for the selected record. You will notice that the **Journal** tab looks strikingly like the Journal file itself. This is because the **Journal** tab has all the same features of the Journal file, but is filtered by the selected client or contact.

Creating a New Journal Record

From the **Journal** tab in the Client or Contact file, it's easy to create a new journal record. To do so, simply click the ☐ button in the toolbar or press Ctrl + N. When you do this, a New Journal Record window will be displayed asking you which type of journal you want to create. Select the type of journal record you would like to create and click **OK**.

The next section will discuss the various types of journal records you can create.
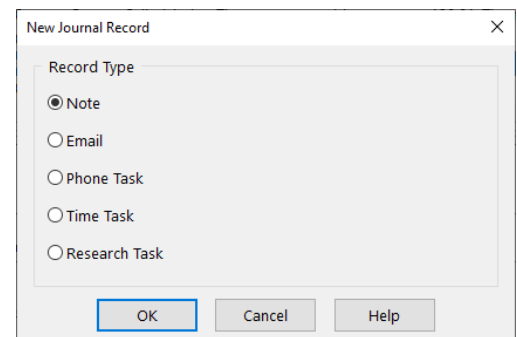
Types of Journal Records

There are five different types of journal records that you can create in PracticeMaster. These are based on emails, timers, phone conversations, research, or client notes. The following sections will explore each of these journal types and describe their specific functions and requirements.

Email

One of the most commonly performed tasks is reading and sending emails. Once the Outlook Plug-in is installed, you can save any email as a journal record from within Microsoft Outlook. The Comments field lets you or other firm members make notes regarding the email. Additionally, start a new email message, and upon sending PracticeMaster will open and you can enter additional notes in the journal record. To start a new email using the address in an existing

Email journal record, open the record and click the ✉ button next to the desired field.
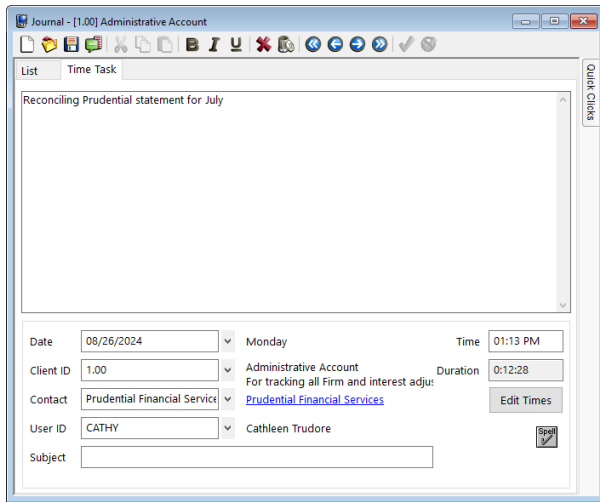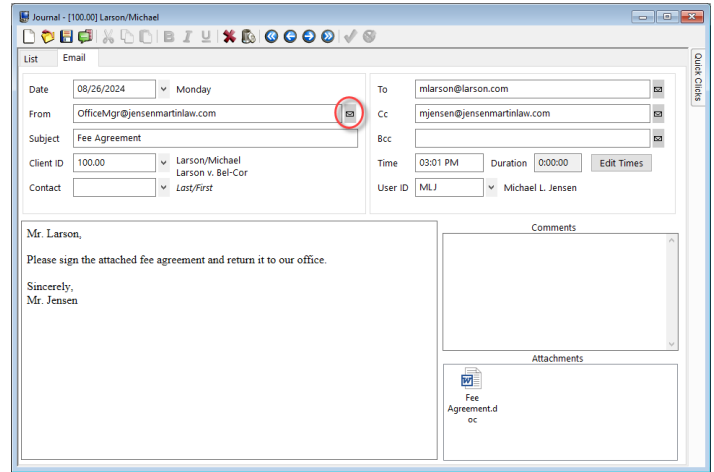
Time Task

PracticeMaster lets you track your daily activities using the timer. This can be done with a Time Task journal record. More information on timers can be found in the Timer Window Quick Guide.

Phone Task

Often, you will discuss a case over the phone. You may want to take notes from this phone conversation and perhaps even bill for the time. You can accomplish this with a Phone Task journal record. When you open the new journal record, just start typing your notes from the phone conversation.
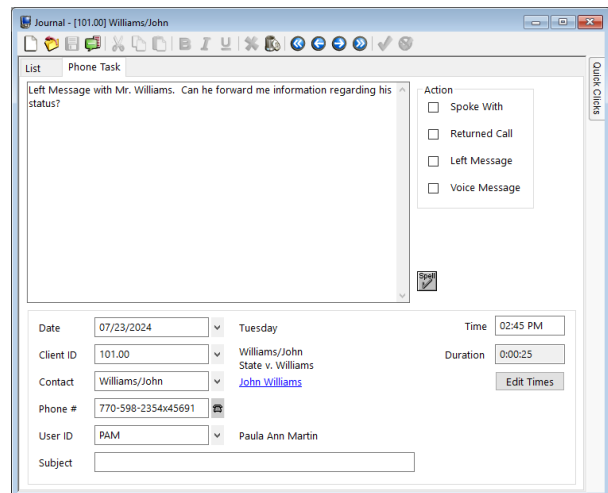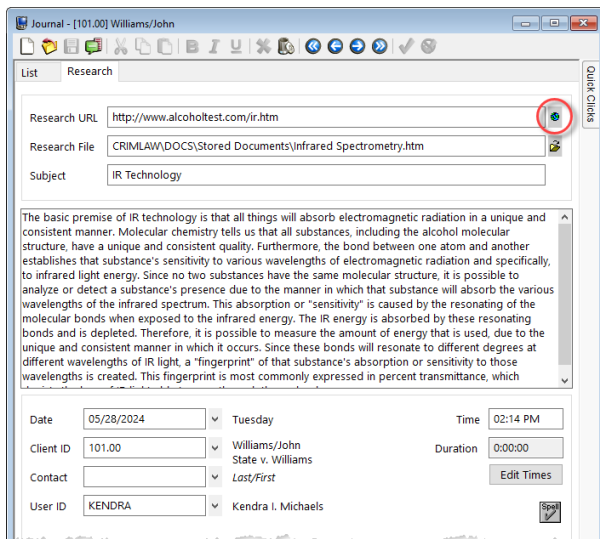
Research Task

When you are performing online research for a case, you may want to keep track of how long it took to perform the research, as well as make notes about your findings. This is done with a Research Task journal record. This type of record includes fields to enter your

sources, such as a URL or file. There is also space to enter notes about your research. Clicking the button next to the **Research URL** field opens the specified Web page in your default web browser.

Notes

Sometimes, you may be interrupted during your day by someone who wants to talk about a case. You will likely want to open the client's file and take some notes about the impromptu meeting, even if the time is not billable. This is done in a Note journal record.

The purpose of this journal record is to give you the opportunity to record notes, associate them with a client and/or contact, and save them for future reference.
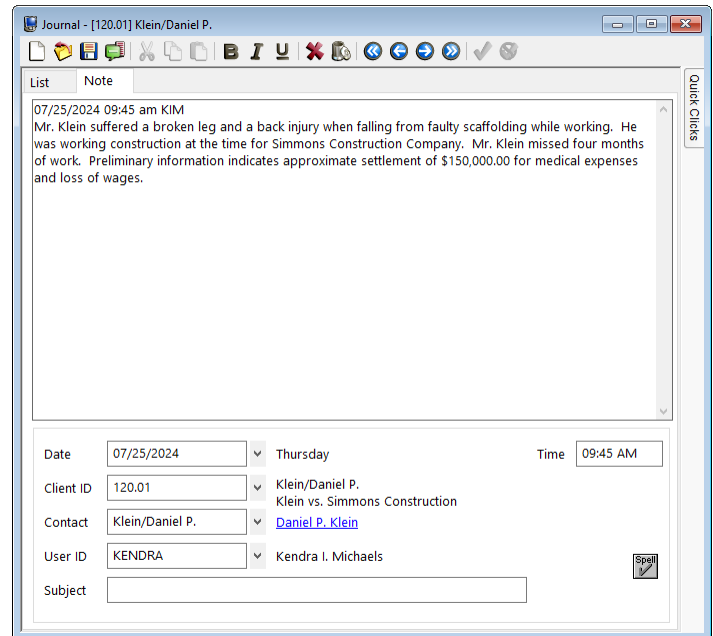
Journaling from the Matter Manager

Many attorneys work primarily from the Matter Manager in PracticeMaster. You can easily add journal records from here too. To open the Matter Manager, in the Quick Launch, search for and select "Matter Manager." Once the Matter Manager is open, simply select the **Journal** record type as shown in the figure below, and then click the button.
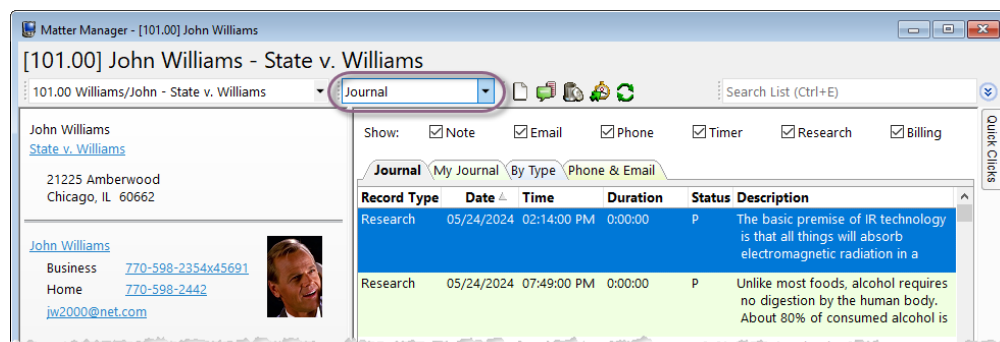

Journal Tab in Client & Contact Files vs. Journal File

Depending on what you want to do with the journal in PracticeMaster, you will either want to access the records via the **Journal** tab in the Client or Contact file, or through the Journal file itself. There are advantages to each approach and this section will help you decide when to use each method to best suit your needs.

Journal Tab in Client and Contact Files

The Journal tab in the Client and Contact files is an excellent choice if you are creating a new journal entry for a specific client or contact. It is also helpful when you just want to see the journals associated with a particular client or contact. For example, if you want to view only the Phone and Email records for a particular client or contact, a series of check boxes in the toolbar of the **Journal** tab in each file provides a built-in filter, as shown in the Client file in the figure on the right. You can also sort journal records using the column headers.
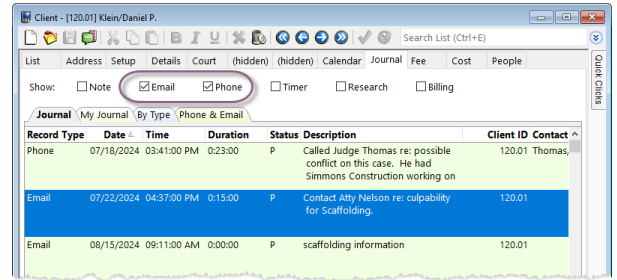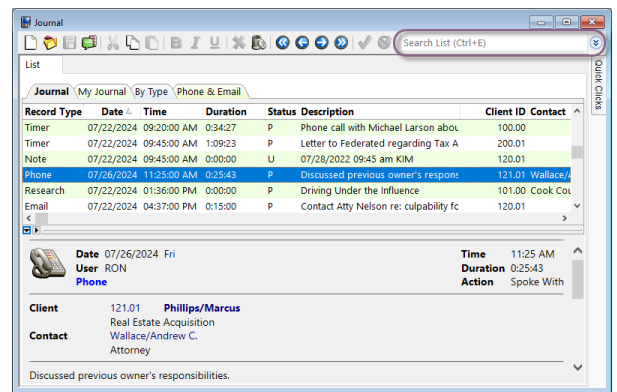
Journal File

The Journal file is typically used when you want to view journal records for all clients and contacts or locate a journal record that is not associated with a client or contact. It is best used if you want to see all journal records created on a particular day, search all records for a key phrase, or search for a particular field value. You can also sort the records by column in ascending or descending order. The biggest advantage to the Journal file is the ability to apply filters for searching, sorting, and reporting purposes.

Reporting, Sorting, and Filtering

From the Journal file, there are multiple ways to search, sort, and filter journal records. Like other lists in PracticeMaster, you can sort journal records using any of the column headers. Alternatively, you can use the Search Box to search all columns for the desired text or create a filter to sort the journal records to your liking. The Search Box is discussed in detail in the PracticeMaster Search Guide. The process of filtering the Journal file is explained below.

Getting Started with Filtering

In the Journal file, click the button on the **Filter** group of the Quick Clicks pane. Any pre-existing filters will be listed here along with the **Manage Filters** option, which provides access to the Filter section and can be used to create a custom filter.

Manage Filters

The Filter is a powerful tool that makes it easy to find exactly what you're looking for. To begin, select **Manage Filters** from the **Filter** group of the Quick Clicks pane. This will open the Manage Quick Clicks window. Press Ctrl+N (New) to open the **Filter Editor** where you can define queries for the Expression filter.

To pick your first field, click in the **Field Name** column, as indicated in the figure to the left. This will open a window that allows you to select from a list of fields. You can then define the other criteria for the expression.

For example, if you want to search for all journal records dated 8/22/2024 or 8/23/2024, you could easily do this using the Filter Editor, as shown in the figure to the left. By simply using the lookup arrows and inserting new rows in the query, it's easy to search for virtually any combination of field values. Alternatively, you can click the **Advanced Row** button to enter an advanced expression.

If you require assistance with creating or updating filters, contact your PracticeMaster consultant, or our Support Department at (402) 419-2210 for assistance.