

PracticeMaster Sample Reports



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Version 17 (January 2014)

PracticeMaster Sample Reports

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Optional Report Footer

Footer

Print Footer

Print User Initials

Print Horizontal Ruling Line

The software can be configured to include an optional footer on the reports. The footer includes the day of the week, date, and time the report is printed. You can optionally include a horizontal ruling line and the initials of the User ID who prints the report.

The footer is configured at the printer level for each workstation in the Advanced Printing Options window (*File | Print Setup | Advanced Printing Options*).

The following is an example of a footer with the user initials and horizontal ruling line.

DKH *Thursday 10/15/2014 1:55pm*

Area of Practice List

Date: 11/17/2014		Area of Practice List		Page: 1
		Burns, Jensen & Powers, P.C.		
Name	Description	Files	Document Path	
CMSYSTEM	System Files	17	CMSYSTEM\DOCS\	
WC	Workers' Compensation	8	WC\DOCS\	
FAMILY	Family Law	11	FAMILY\DOCS\	
PI	Personal Injury Law	10	PI\DOCS\	
ADMIN	Administrative/Personnel	3	ADMIN\DOCS\	
BUSLAW	Business Law	12	BUSLAW\DOCS\	
CRIMLAW	Criminal Law	7	CRIMLAW\DOCS\	
FORECLOS	Foreclosure Law	10	FORECLOS\DOCS\	
PROBATE	Probate Law	20	PROBATE\DOCS\	
REALEST	Real Estate Law	8	REALEST\DOCS\	
WILLS	Wills and Trusts Law	17	WILLS\DOCS\	

Menu

Maintenance | File Maintenance | Print AOP List

The Area of Practice List is accessed via File Maintenance by right-clicking **System Files** and selecting **Print AOP List**. This report includes all of the Areas of Practice present in PracticeMaster. This report cannot be modified.

Category List

Report Writer Name

CATEGORY

The Category List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all categories present in PracticeMaster. It can be generated in alphabetical order based on the category description or numerical order based on the category number.

11/17/2014		PracticeMaster		Page: 1
		Numerical Category List		
		Burns, Jensen & Powers, P.C.		
Category Number	Code Set	Description		
1		Personal Injury		
5		Wills/Trusts/Estates		
10		Workers' Compensation		
15	P	Probate		
20		Tax Law		
25	B	Real Estate		
30	B	Foreclosure		
35		Family Law		
40		Business Law		
45		Trademarks/Copyrights/Patents		
50		Criminal Law		
55	L	Insurance Defense		
60	L	General Litigation		

11/17/2014		PracticeMaster		Page: 1
		Alphabetical Category List		
		Burns, Jensen & Powers, P.C.		
Category Number	Code Set	Description		
40		Business Law		
50		Criminal Law		
35		Family Law		
30	B	Foreclosure		
60	L	General Litigation		
55	L	Insurance Defense		
1	B	Personal Injury		
15	P	Probate		
25		Real Estate		
20		Tax Law		
45		Trademarks/Copyrights/Patents		
5		Wills/Trusts/Estates		
10		Worker's Compensation		

Timekeeper List

Report Writer Name **TMKRLIST**

The Timekeeper List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all timekeepers present in PracticeMaster. An * next to the timekeeper's name indicates the timekeeper is marked as an inactive timekeeper. It can be generated in alphabetical or numerical order. The alphabetical list sorts the timekeepers in alphabetical order by last name.

11/17/2014		PracticeMaster		Page: 1
		Numeric Timekeeper List		
		Burns, Jensen & Powers, P.C.		
Timekeeper Number	Init.	Name	Rate	
1	RJB	Robert J Burns	250.00	
2	MLJ	Michael L. Jensen	225.00	
3	PAM	Paula A. Madison	160.00	
4	DHB	Daniel H. Brady	175.00	
5	JPP	*Julie P. Powers	140.00	

Location List

Date: 11/17/2014		Location File List		Page: 1
		Burns, Jensen & Powers, P.C.		
Location ID	Description			
Columbus	Columbus Office			
Kearney	Kearney Office			
Lincoln	Lincoln Office			
Omaha	Omaha Office			

Report Writer Name **LOCATION**

The Location List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all locations present in PracticeMaster.

Text Macro List

Report Writer Name **MACRO**

The Text Macro List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all text macros present in PracticeMaster.

Date: 11/17/2014		Text Macro List		Page: 1
		Burns, Jensen & Powers, P.C.		
Macro ID	Text			
ATT	attended			
CA	court appearance			
CF	courier fee			
COM	communicate with			
DAR	draft and revise			
DOM	<i>Petition for Dissolution of Marriage</i> and related documents			
EN	enclosure			
FF	filing fee			
INT	interrogatories			
INTDOC	<i>Interrogatories and Request for Production of Documents</i>			
INV	investigation of			
LD	long distance telephone charges			
LR	legal research			
LT	letter to			
LWT	<i>Last Will and Testament</i>			
MED	medical records			
ML	mileage to/from			
MSJ	<i>Motion for Summary Judgement</i>			
NOA	<i>Notice of Appearance</i>			
NONPAY	concerning outstanding balance. Discussed the possibility of setting up a monthly payment schedule. Confirmed that no additional work will be performed until a good faith payment is made toward the outstanding balance.			
OC	office conference with			
OLR	online legal research			
OPF	outside professional fee			
OPP	opposing counsel			
OPPDO	opposing counsel regarding discovery and production of documents			
OSC	outside conference with			
PNG	<i>Plea of Not Guilty</i>			
PP	plan and prepare for			
RA	review and analyze			
RO	receipt of			
SETT	terms of settlement and receipt of settlement check			
SF	sheriff's fee			
TC	telephone conference with			
TDS	to discuss current status and issues relating to the case.			
TE	trial exhibits			
TEX	travel expense			

Tcode	Alpha Code	Description
1	OC	Office conference with
2	OS	Outside conference with
3	TC	Telephone conference with
4	OF	Open file
5	LT	Letter to
6	RE	Receipt of
7	PP	Plan and prepare for
8	DA	Draft and revise
9	RA	Review and analyze
10	LR	Legal research
11	CA	Court appearance
12	INV	Investigation of
13	ATT	Attended
14	CO	Communicate with
15	UP	Update files/records
16	PF	(progress fee)
17	DES	(description only)
18	MIS	(miscellaneous fee)
50	LD	Long distance telephone charges
51	CO	Photocopy charges
52	ML	Mileage to/from
53	PO	Postage
54	TEX	Travel expense
55	FAX	Facsimile costs
56	ME	(miscellaneous expense)
70	FF	Filing fee
71	PR	Processor fee
72	CF	Courier fee
73	OPF	Outside professional fee
74	ME	Medical records
75	SF	Sheriff's fee
76	OLR	Online legal research
77	TRA	Transcription fees
78	EX	Trial exhibits
79	MA	(miscellaneous advance)
90	PY	Payment
91	FPY	Fee Payment
92	EPY	Expense Payment
93	APY	Advance Payment
94	FCC	Credit for finance charge billed
95	DEP	Deposit to client funds
96	WIT	Withdrawal from client funds

Transaction Code List

Report Writer Name **TCODE**

The Transaction Code List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all transaction codes present in PracticeMaster. It can be generated in alphabetical or numerical order.

Phase Activity ID	Tcode	Description
A101	7	Plan and prepare for
A102	10	Research
A103	8	Draft/revise
A104	9	Review/analyze
A105	14	Communicate (within legal team)
A106	14	Communicate (with client)
A107	14	Communicate (opponents/other outside counsel)
A108	14	Communicate (other external)
A109	13	Appear for/attend
A110	15	Manage data/files/documentation
A111	18	Other
A112	254	Billable Travel Time
A113	14	Communicate (witnesses)
A114	14	Communicate (experts)
A115	15	Medical Record and Medical Bill Management
A116	10	Training
A117	15	Special Handling Copying/Scanning/Imaging (Internal)
A118	12	Collection-Forensic
A119	15	Culling & Filtering
A120	15	Processing
A121	15	Review and Analysis
A122	9	Quality Assurance and Control
A123	10	Search Creation and Execution
A124	15	Privilege Review Culling and Log Creation
A125	8	Document Production Creation and Preparation
A126	7	Evidence/Exhibit Creation and Preparation
A127	7	Project Management
A128	9	Collection Closing Activities
B100	0	Administration
B110	0	Case Administration
B120	0	Asset Analysis and Recovery
B130	0	Asset Disposition
B140	0	Relief from Stay/Adequate Protection Proceedings
B150	0	Meetings of and Communications with Creditors
B160	0	Fee/Employment Applications
B170	0	Fee/Employment Objections
B180	0	Avoidance Action Analysis
B185	0	Assumption/Rejection of Leases and Contracts
B190	0	Other Contested Matters (excluding assumption/rejection motions)
B195	0	Non-Working Travel
B200	0	Operations
B210	0	Business Operations
B220	0	Employee Benefits/Pensions
B230	0	Financing/Cash Collections
B240	0	Tax Issues
B250	0	Real Estate
B260	0	Board of Directors Matters
B300	0	Claims and Plan
B310	0	Claims Administration and Objections
B320	0	Plan and Disclosure Statement (including Business Plan)
B400	0	Bankruptcy-Related Advice
B410	0	General Bankruptcy Advice/Opinions
B420	0	Restructurings

Task Code List

Report Writer Name **TASKCODE**

The Task Code List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all task codes present in PracticeMaster.

Calendar Code List

Report Writer Name

CAL_CODE

The Calendar Code List is a Report Writer report included with PracticeMaster and can be modified as desired. This report displays all calendar codes present in PracticeMaster.

Cal Code	Desc
AD	Answer to complaint due
Anniv	Anniversary
Appoint	Appointment with
Attend	Attend
BDAY	Birthday
Bk	Breakfast
BL	Business luncheon with
CA	Court appearance
CD	Closing Date
CI	Confirmation of Issues
CLE	Continuing Legal Education
CM	Client Meeting
Con	Continuance
Cons	Consultation
CS	Confirmation of Service
DC	Discovery Cutoff
DD	Discovery Due
Dep	Deposition of
Dinner	Dinner with
DPM	Deadline for Hearing Dispositive Pretrial Motions
DPW	Disclosure of Possible Primary Witnesses
DRW	Disclosure of Possible Rebuttal Witnesses
EL	Exchange of Witness/Exhibit Lists
FC	File Complaint
FD	Filing Deadline
Firm	Firm Meeting
FM	File Motion
Foll	Follow up with
Hearing	Hearing
ICM	Initial Client Meeting
IO	Investigation of
JSE	Joint Statement of Evidence
Jury	Jury Selection
LD	Limitation Date
LR	Legal research
LT	Letter to
Lunch	Luncheon with
Med	Mediation
Memo	Send memo to
Misc	Miscellaneous
MW	Meeting with
MWC	Meeting with client
OC	Office conference with
Out	Out of Office
OutCW	Outside conference with
PC	Pretrial Conference
PE	Personal Event
PM	Partners Meeting
Prep	Prepare for
PT	Personal Task
RD	Renewal date

Cal Code	Desc
Research	Research
Rev	Review
SCW	Status conference with
Sem	Seminar
Sick	Sick Time
SM	Settlement Meeting
TaxesDue	Tax Return Deadline
TCD	Trial Confirmation Date
TCW	Telephone conference with
TD	Trial Date
TP	Tax Planning
trial	In trial at
TT	Travel Time
Vac	Vacation Time

Master Client List

Report Writer Name

_CLNTLST

The Master Client List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all clients present in PracticeMaster. The report can be generated for a range of Client IDs and primary timekeepers. It can optionally be printed in primary timekeeper order. Clients are listed in Client ID order. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014		Master Client List			Page: 1	
Burns, Jensen & Powers, P.C.						
Client Range:	100.00 to 200.03					
Timekeeper Range:	1 to 999					
Dawson/Charles L. 27550 Cottonwood Drive San Bernardino, CA 92408						
100.00	REALEST	Settlement of Grandfather's Estate	Chuck Dawson	714-884-7525	JPP	
Barrett/Karen 3010 South 14th Street Lincoln, NE 68510						
101.00	REALEST	Apartment Management	Karen Barrett	402-466-1234	DHB	
Richardson/Harold 1548 West 57th Street Rochester, NY 14603-8409						
102.00	BUSLAW	Manage personal finances	Harold Richardson	716-253-4510	RJB	
Jefferson Insurance Co. American Charter Building 9th & West 'O' Streets Suite 220 Lincoln, NE 68510-6330						
200.01	PI	Automobile Accident	Mike Johnson	402-464-2200	RJB	
Jefferson Insurance Co. American Charter Building 9th & West 'O' Streets Suite 220 Lincoln, NE 68510-6330						
200.02	BUSLAW	Hail Damage - Palmer farm	Mark Allen	402-464-2200	RJB	

Area of Practice Client List

Report Writer Name

AOP_CLNT

The Area of Practice Client List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all clients and can be displayed in alphabetical or numerical order. This report can be generated for a specified range of Clients IDs, Areas of Practice, timekeepers and open dates. Clients can optionally be sorted by Area of Practice and timekeeper. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014		Area of Practice Client List			Page: 1	
Burns, Jensen & Powers, P.C.						
Client Range:	100.00 to 900.00					
Area of Practice Range:	ADMIN to REALEST	Client Order:	Numerical			
Timekeeper Range:	1 to 999	Area of Practice Order:	Yes			
Date Range:	mm/dd/yyyy to mm/dd/yyyy	Timekeeper Order:	No			
Area of Practice: BUSLAW - Business Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
102.00	BUSLAW	Richardson/Harold	Manage personal finances	05/10/2014	RJB	
200.03	BUSLAW	Jefferson Insurance Co.	Acquisition of Mid-State Insurance	07/01/2014	RJB	
200.02	BUSLAW	Jefferson Insurance Co.	Hail Damage - Palmer farm	06/10/2014	RJB	
350.00	BUSLAW	Carter/Arthur J.	Protection of New Wave Patent	07/21/2014	MLJ	
Area of Practice: FAMILY - Family Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
850.00	FAMILY	White/Kelly	Divorce	10/03/2014	DH	
900.00	FAMILY	Sherman/Natalie K.	Divorce	10/04/2014	DH	
Area of Practice: PI - Personal Injury Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
200.01	PI	Jefferson Insurance Co.	Automobile Accident	06/02/2014	RJB	
600.00	PI	Ace Manufacturing Company	General Legal Counsel	09/06/2014	MLJ	
Area of Practice: REALEST - Real Estate Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
100.00	REALEST	Dawson/Charles L.	Settlement of Grandfather's Estate	04/01/2014	JPP	
101.00	REALEST	Barrett/Karen	Apartment Management	05/02/2014	DH	
Total Clients: 10						

Alphabetical Client List

Report Writer Name

CLNTLIST

The Alphabetical Client List is a Report Writer report included in PracticeMaster and can be modified as desired. This list can be generated for a specified range of Client IDs. Clients are listed in alphabetical order and files for each client are listed in Client ID order. This list can be printed for active clients, inactive clients or both. The report shown above is printed for both. When both inactive and active clients are included on the report, an asterisk is printed after the Client ID for those clients that are inactive. A footer is displayed at the end of the report indicating the number of clients and text regarding the asterisk and inactive clients. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Client Name	Client ID	Description
ABC Insurance Company	800.00	Death Benefits
Able/Paul & Mary	450.00	Parent's Estate
Ace Manufacturing Company	600.00	General Legal Counsel
Ace Manufacturing Company	600.01	Workers' compensation claim
Ace Manufacturing Company	600.02	Maintenance of insurance policies
Barrett/Karen	101.00	Apartment Management
Carter/Arthur J.	350.00	Protection of New Wave Patent
Dawson/Charles L.	100.00	Settlement of Grandfather's Estate
Federated Casualty, Ltd.	550.00	Andrew C. Gilbert v. Federated Casualty
First National Bank	700.00	General File
Harrison Investments	750.00	Purchase of Real Estate
Harrison/Bradley	751.00	Purchase of Real Estate
Jefferson Insurance Co.	200.01*	Automobile Accident
Jefferson Insurance Co.	200.02	Hail Damage - Palmer farm
Jefferson Insurance Co.	200.03	Acquisition of Mid-State Insurance
Kiltzer/George	402.00	Set up trust for children
Lutz/Jody	400.00	Manage trust account for Jody
Lyons/Mr. & Mrs. Art	500.00*	Audit of Federal Income Taxes
Martin/Mary L. & Fred J.	103.00	Private Adoption
McBride/John	300.00*	Management of Estate Trust
Richardson/Harold	102.00*	Manage personal finances
Sherman/Natalie K.	900.00	Divorce
White/Kelly	850.00	Divorce
Total Clients: 23		
An asterisk (*) printed after the Client ID indicates the client is inactive.		

Client Mailing Labels

Report Writer Name

LABELIX4

Client mailing labels can be generated using the Report Writer included with PracticeMaster with a 1" by 4" label format. This report is sorted by zip code in Client Name order and allows you to specify a range of Client IDs. As with all Report Writer reports, you can modify this report to meet your needs. For example, you can add a Selection Expression to only select specified clients. Or, as another example, you can add a Selection Expression to only select clients whose **Date Opened** field is greater than 01/01/14.

Richardson/Harold 1548 West 57th Street Rochester NY 14603-8409
Martin/Mary L. & Fred J. 4200 Goldenrod Circle Omaha NE 68113
Klein/Daniel P. 795 North Apple Greenwood NE 68366
Carter/Arthur J. 4920 Everett Lincoln NE 68503
McBride/John Eastmont Towers 2920 Northwest Greenbriar Lane Lincoln NE 68505

Client List by Primary Timekeeper

Report Writer Name

CLNT_TK

The Client List by Primary Timekeeper is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a specified range of Client IDs and primary timekeepers. Clients are sorted by primary timekeeper and are listed in Client ID order. A count of clients is displayed for the entire report as well as a subtotal count for clients for each primary timekeeper. When including a subtotal count on a report, a separate Count column must be used. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Client ID	Client Name	Description	Count
102.00	Richardson/Harold	Manage personal finances	1
103.00	Martin/Mary L. & Fred J.	Private Adoption	1
200.01	Jefferson Insurance Co.	Automobile Accident	1
200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm	1
200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance	1
300.00	McBride/John	Management of Estate Trust	1
450.00	Able/Paul & Mary	Parent's Estate	1
550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty	1
700.00	First National Bank	General File	1
800.00	ABC Insurance Company	Death Benefits	1
Client Count			10
Timekeeper: 1 Robert J. Burns			
Client ID	Client Name	Description	Count
350.00	Carter/Arthur J.	Protection of New Wave Patent	1
600.00	Ace Manufacturing Company	General Legal Counsel	1
600.01	Ace Manufacturing Company	Workers' compensation claim	1
600.02	Ace Manufacturing Company	Maintenance of insurance policies	1
Client Count			4
Timekeeper: 2 Michael L. Jensen			
Total Clients			14

List of Client's Birthdays

Report Writer Name

_BIRTHDY

The List of Client's Birthdays is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a specified range of Client Names and months. Clients are sorted by birthday month. A count of birthdays is displayed for the entire report.

Client Name	Age
Barrett/Karen	69
Sherman/Natalie K.	71
McBride/John	61
Richardson/Harold	43
Dawson/Charles L.	47
Carter/Arthur J.	35
Number of Birthdays = 6	

Client Referral Report

Report Writer Name

REFERRAL

The Client Referral Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes referred clients sorted by Area of Practice and are displayed in Client ID order. This report can be generated for a specified range of Client IDs, Areas of Practice, referral names and open dates. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014		Client Referral Report		Page: 1	
Burns, Jensen & Powers, P.C.					
Client Range:	100.00	to	900.00		
Area of Practice Range:	ADMIN	to	WILLS		
Referral Range:	AAA	to	ZZZ		
Date Opened Range:	01/01/2014	to	07/01/2014		
BUSLAW - Business Law					
Client ID	Client Name	Date Opened	Referred By		
200.02	Jefferson Insurance Co.	06/09/2014	Farmer's Mutual Health & Life Ins		
102.00	Richardson/Harold	05/12/2014	Knight/Elizabeth M.		
200.03	Jefferson Insurance Co.	06/27/2014	Lewis/Joseph M.		
PI - Personal Injury Law					
Client ID	Client Name	Date Opened	Referred By		
200.01	Jefferson Insurance Co.	06/02/2014	Farmer's Mutual Health & Life Ins		
REALEST - Real Estate Law					
Client ID	Client Name	Date Opened	Referred By		
100.00	Dawson/Charles L.	04/04/2014	Brown/Stephanie J.		
101.00	Barrett/Karen	05/02/2014	Murray/Alex J.		

Litigation Analysis

Report Writer Name

ANALYSIS

The Litigation Analysis report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes Client IDs sorted by Area of Practice and are displayed in Client ID order. This report can be generated for a specified range of Client IDs, Areas of Practice and close dates. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014		Litigation Analysis		Page: 1			
Burns, Jensen & Powers, P.C.							
Client Range:	100.00	to	900.00				
Area of Practice Range:	ADMIN	to	WILLS				
Date Closed Range:	01/01/2014	to	11/01/2014				
BUSLAW - Business Law							
Client ID	Client Name	Description	Date Opened	Date Closed	Days In Litigation	Months In Litigation	
102.00	Richardson/Harold	Manage personal finances	05/09/2014	08/01/2014	83	2.7	
Area of Practice Average					83	2.7	
FORECLO - Foreclosure Law							
Client ID	Client Name	Description	Date Opened	Date Closed	Days In Litigation	Months In Litigation	
300.00	McBride/John	Management of Estate Trust	07/15/2014	11/01/2014	109	3.6	
Area of Practice Average					109	3.6	
PI - Personal Injury Law							
Client ID	Client Name	Description	Date Opened	Date Closed	Days In Litigation	Months In Litigation	
200.01	Jefferson Insurance Co.	Automobile Accident	06/02/2014	10/31/2014	152	5.0	
Area of Practice Average					152	5.0	
Average Litigation					115	3.8	

Blank Client ID Calendar Records

Report Writer Name BLANKID

The Blank Client ID Calendar Records report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records without an assigned Client ID. This report can be generated for a specified range of due dates.

Date: 11/17/2014		Blank Client ID Calendar Records					Page: 1	
<u>10/03/2014 Friday</u>								
Start Time	Stop Time	User	Type	Completed	Description	Location		
12:00 AM	11:59 PM	MLJ	E		Vacation			
<u>10/06/2014 Monday</u>								
Start Time	Stop Time	User	Type	Completed	Description	Location		
08:00 AM	hh:mm AM	JEN	T	10/10/2014	Birthday			
09:00 AM	11:00 AM	CLB	E		Partners meeting			
09:00 AM	11:00 AM	MLJ	E		Partners meeting			
09:00 AM	11:00 AM	RJB	E		Partners meeting			
02:30 PM	04:30 PM	RJB	E		Meeting with Harold Berk in Conference Room.			
<u>10/07/2014 Tuesday</u>								
Start Time	Stop Time	User	Type	Completed	Description	Location		
10:15 AM	11:30 AM	MLJ	E		Meeting with Robert Maxwell			
12:00 PM	01:00 PM	RJB	E		Luncheon with Steve	P.F. Chang's		
<u>10/08/2014 Wednesday</u>								
Start Time	Stop Time	User	Type	Completed	Description	Location		
08:00 AM	10:00 AM	PA	E		Meeting with Mike Johnson			
11:30 AM	12:45 PM	CLB	E		Business luncheon.	The Knoll's		
12:00 PM	01:15 PM	JEN	E		Luncheon with daughter.			
03:00 PM	04:30 PM	MLJ	E		Appointment with Jim Tucker.			
<u>10/09/2014 Thursday</u>								
Start Time	Stop Time	User	Type	Completed	Description	Location		
08:45 AM	11:45 AM	CLB	E		Firm Meeting			
08:45 AM	11:45 AM	JEN	E		Firm Meeting			
08:45 AM	11:45 AM	MLJ	E		Firm Meeting			
08:45 AM	11:45 AM	RJB	E		Firm Meeting			
12:00 PM	01:00 PM	RJB	E		Business luncheon with John Williams.			
01:45 PM	03:00 PM	MLJ	E		Appointment with Robert Maxwell			
03:30 PM	05:00 PM	JEN	E		Outside conference with Julie Thomas.			
<u>10/10/2014 Friday</u>								
Start Time	Stop Time	User	Type	Completed	Description	Location		
12:00 AM	11:59 PM	MLJ	E		Vacation			

Client Calendar

Report Writer Name CLNTCAL

The Client Calendar report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records sorted by Client ID. This report can be generated for a specified range of Client IDs, due dates and user IDs. You can specify which calendar Types to include on the report (i.e., E-event, T-task). This report can also be generated for "incomplete entries only." For purposes of this report, an incomplete entry is defined as a task calendar record without a date in the **Date Completed** field or an event with a **Due Date** within the specified date range.

Date: 11/17/2014		Client Calendar			Page: 1	
Client Range:	200.02 to 200.02	Calendar Type(s):		E,T		
Due Date Range:	10/01/2014 to 10/18/2014	Incomplete Entries Only:		No		
User Range:	to ZZZ					
200.02 Peterson Insurance Co.		Area of Practice:		ADMIN		
Maintenance of Insurance Policies		Primary Timekeeper:		RP		
10/13/2014	Monday	JEN				
01:00 PM				Office conference with Richard Jackson.		
10/14/2014	Tuesday	RON				
				Preparation of proposal for Mid-State Insurance Company.	Completed: 10/15/2014	
01:15 PM		JEN		Appointment with Paul Franklin.		
				Omaha Office		
10/17/2014	Friday	CHERYL				
11:30 AM				Meeting with Paul.		
11:30 AM		RON		Meeting with Paul.		
10/21/2014	Tuesday	RON				
11:00 AM				Filing Deadline	Incomplete Task	

Calendar by Due Date

Report Writer Name **CALDUE**

The Calendar by Due Date report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records sorted by due date. You can specify a range of Client IDs, due dates, and user IDs as well as which calendar types to include on the report (i.e., E-event, T-task). This report can also be generated for "incomplete entries only." For purposes of this report, an incomplete entry is defined as a task calendar record without a date in the **Date Completed** field or an event with a **Due Date** within the specified date range. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014		Calendar by Due Date		Page: 1	
Case Range:	200.02 to			Calendar Type(s): E,T	
Due Date Range:	10/01/2014 to 10/31/2014			Incomplete Entries Only: No	
User Range:	to ZZZ				
<u>10/06/2014 Monday</u>					
Time	User	Type	Completed	Description	
01:00 PM	JEN	E		Office conference with Richard Jackson. Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies	
<u>10/07/2014 Tuesday</u>					
Time	User	Type	Completed	Description	
hh:mm AM	RON	T	10/12/2014	Preparation of proposal for Mid-State Insurance Company. Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies	
01:15 PM	JEN	E		Appointment with Paul Franklin. Location: Omaha Office Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies	
<u>10/10/2014 Friday</u>					
Time	User	Type	Completed	Description	
11:30 AM	CHERYL	E		Meeting with Paul. Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies	
11:30 AM	RON	E		Meeting with Paul. Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies	

Date: 11/17/2014		Calendar by User		Page: 1	
Case Range:	100.00 to 200.02			Calendar Type(s): E,T	
User Range:	MLJ to MLJ				
Date Range:	10/01/2014 to 10/31/2014				
<u>User: Michael L. Jensen</u>					
Wednesday	10/09/2014	09:30 AM	Type: E	Office conference with Arthur Carter Client ID: 101.00 Williams,John AOP: CRIMLAW State v. Williams	
Monday	10/13/2014	09:15 AM	Type: E	Attend meeting with Jim Peterson. Location: Kearney Office Client ID: 200.01 Peterson Insurance Co. AOP: WC General Legal Counsel	
Wednesday	10/15/2014	10:45 AM	Type: E	Appointment with Jim Peterson Client ID: 200.01 Peterson Insurance Co. AOP: WC General Legal Counsel	
Thursday	10/16/2014	11:30 AM	Type: E	Outside conference with John Williams. Location: Hilton Client ID: 101.00 Williams,John AOP: CRIMLAW State v. Williams	
Friday	10/24/2014	11:00 AM	Type: T	Filing Deadline Client ID: 102.00 Federated Casualty, Ltd. AOP: PI Andrew C. Gilbert v. Federated Casualty	

Calendar by User

Report Writer Name **CALUSER**

The Calendar by User report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records sorted by user. You can specify a range of Client IDs, due dates and user IDs as well as which calendar types to include on the report (i.e., E-event, T-task). Drill-down editing capabilities allow you to edit records directly from the Preview window.

Daily Report

Menu

Reports | Daily Report

The Daily Report is a calendar report that can optionally include tasks, events, and reminders. You can specify a date range and specify which users to include. You can optionally include Calendar Comments, Client Name, and the Client Work Description with each Description. Activities can be categorized by 1) Type, then by Date; or 2) by Date, then by Type. You can optionally include overdue tasks and tasks with no Due Date. Completed tasks are not included on this report (i.e., tasks with a date in the Completed Date field). Reports for each specified user will start on a new page. If categorizing activities by Date, then by Type, you can optionally start each date on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window. This report cannot be modified.

The report on the left is sorted by Type, then by Date. The report on the right is sorted by Date, then by Type and also includes the client name and work description.

Date: 11/17/2014		Daily Report		Page: 1	
Jensen, Martin & Anderson, P.C.					
Report Date Range: 11/01/2014 thru 11/30/2014					
User ID: MLJ					
Client ID	Due Date	Day	Start Time	Events End Time	Description
	11/10/2014	Mon	03:00 PM	04:30 PM	Appointment with Jim Tucker.
	11/13/2014	Thu	08:30 AM	09:00 AM	Initial Client Meeting Enrique Sanchez
200.01	11/14/2014	Fri	09:15 AM	11:00 AM	Attend meeting with Jim Peterson.
	11/17/2014	Mon	09:30 AM	09:45 AM	Appointment with Harry Jones. Potential new client.
200.01	11/17/2014	Mon	10:30 AM	11:45 AM	Appointment with Jim Peterson
200.02	11/24/2014	Mon	08:00 AM	09:30 AM	Meeting with Health USA.
	11/24/2014	Mon	10:15 AM	11:30 AM	Meeting with Robert Maxwell.
Tasks					
Client ID	Due Date	Day	Description		
102.00	11/18/2014	Tue	Filing Deadline		
Reminders					
Client ID	Due Date	Day	Start Time	Reminder	Description
	11/17/2014	Tue	09:30 AM	11/11/2014	Appointment with Harry Jones. Potential new client.
	11/24/2014	Sun	10:15 AM	11/16/2014	Meeting with Robert Maxwell.

Date: 11/17/2014		Daily Report		Page: 1	
Jensen, Martin & Anderson, P.C.					
Report Date Range: 11/01/2014 thru 11/30/2014					
User ID: MLJ					
11/10/2014 Mon					
Client ID	Start Time	End Time	Description		
	03:00 PM	04:30 PM	Appointment with Jim Tucker.		
11/11/2014 Tue					
Client ID	Due Date	Start Time	Description		
	11/17/2014	09:30 AM	Appointment with Harry Jones. Potential new client.		
11/13/2014 Thu					
Client ID	Start Time	End Time	Description		
	08:30 AM	09:00 AM	Initial Client Meeting Enrique Sanchez		
11/14/2014 Fri					
Client ID	Start Time	End Time	Description		
200.01	09:15 AM	11:00 AM	Attend meeting with Jim Peterson. Peterson Insurance Co. General Legal Counsel		
11/16/2014 Sun					
Client ID	Due Date	Start Time	Description		
	11/24/2014	10:15 AM	Meeting with Robert Maxwell.		
11/17/2014 Mon					
Client ID	Start Time	End Time	Description		
	09:30 AM	09:45 AM	Appointment with Harry Jones. Potential new client.		
200.01	10:30 AM	11:45 AM	Appointment with Jim Peterson Peterson Insurance Co.		

To Do List

Report Writer Name *TODO_LST*

The To Do List is a Report Writer report included in PracticeMaster that can be modified as desired. This report includes calendar records sorted by type and by date. You can specify a range of Client IDs, reminder/due dates and user IDs as well as which calendar types to include on the report (i.e., E-event, T-task).

Date: 11/17/2014		To Do List		Page: 1	
Client Range: 100.00 to 200.02					
Due Date Range: 10/17/2014 to 10/31/2014					
User Range: CHERYL to RON					
Calendar Type(s): E,T					
Events					
Date	Time	User	Description		
10/14/2014	08:30 AM	RJB	Seminar [100.00 Phillips/Marcus]		
	09:15 AM	MLJ	Attend meeting with Jim Peterson. [200.01 Peterson Insurance Co.] Kearney Office		
	12:30 PM	JEN	Business luncheon with Mark Phillips. [100.00 Phillips/Marcus]		
10/16/2014	08:30 AM	RJB	Seminar [100.00 Phillips/Marcus]		
10/17/2014	08:30 AM	RJB	Seminar [100.00 Phillips/Marcus]		
	10:45 AM	MLJ	Appointment with Jim Peterson [200.01 Peterson Insurance Co.]		
10/22/2014	08:30 AM	RJB	Seminar [100.00 Phillips/Marcus]		
	11:30 AM	MLJ	Outside conference with John Williams. [101.00 Williams/John] Hilton		
	01:00 PM	JEN	Appointment with Marcus Phillips [100.00 Phillips/Marcus]		
10/21/2014	08:00 AM	RJB	Outside conference with John Williams. [101.00 Williams/John]		
Tasks					
Date	Time	User	Description		
10/17/2014	09:00 AM	JEN	File Motion to change venue [101.00 Williams/John]		
	11:00 AM	RJB	Filing Deadline [200.02 Peterson Insurance Co.]		
10/22/2014	11:00 AM	MLJ	Filing Deadline [102.00 Federated Casualty, Ltd.]		

Calendar Plan Template Report

Menu

[Calendar](#) | [Calendar Plan Templates](#) | [Print Template](#)

The Calendar Plan Template Report is accessed via the Calendar Plan Templates program by clicking the **Print Template** button when a Calendar Plan Template is highlighted. This report includes the Calendar Plan Template information. This report cannot be modified.

Date: 11/17/2014		Calendar Plan Template Report						Page: 1		
		Burns, Jensen & Powers, P.C.								
Template Name:	Exchange Expert Witnesses									
Description:	Exchange expert witness list									
Area of Practice:	CMSYSTEM									
Venue:	Standard Holidays									
Item	Parent Item	User ID	Type	Interval	Unit	Mail Interval	Mail Unit	Adj	Included Template	
Trial Setting			T							
Trial Date	Trial Setting		E	0	D	0	D	Prev BD	None	
Secondary Exchange Expert Witness List	Trial Date		T	-70	D	0	D	Prev BD	None	
Last court day before Trial for settlement offer	Trial Date		T	-15	D	0	D	Prev BD	None	
Request for Jury instructions	Trial Date		T	-1	BD	0	D	Prev BD	None	
Last court day for settlement offer -mail	Trial Date		T	0	D	-15	MD	Prev BD	None	
Last court day for settlement offer -hand delivery	Trial Date		T	-10	D	0	D	Prev BD	None	
Arrange for copy with court reporter (Last Day)	Trial Date		T	-2	W	0	D	Prev BD	None	
Must file election to arbitrate by today.	Trial Date		T	-90	D	0	D	Prev BD	None	
Exchange Expert Witness List	Trial Setting		T	10	D	0	D	Prev BD	None	

Calendar Plan Report

Menu

[Calendar](#) | [View Calendar Plans](#) | [Print Plan](#)

The Calendar Plan Report is accessed via the View Calendar Plans program by clicking the **Print Plan** button when a Calendar Plan is highlighted. This report includes a list of calendar records generated from a specific Calendar Plan. This report cannot be modified.

Date: 11/17/2014		Calendar Plan Report						Page: 1	
Template Name:		Open New Case							
Client ID:	100.00 Phillips/Marcus Real Estate Acquisition								
Date	Description/Comments	Type	Start Time	End Time	User ID	Client ID	Related Party		
09/29/2014	Generate Fee Agreement	T	hh:mm AM	hh:mm AM	CHERYL	100.00			
09/29/2014	Initial Meeting with Client	T	hh:mm AM	hh:mm AM	CHERYL	100.00			
10/03/2014	Open File	T	hh:mm AM	hh:mm AM	CHERYL	100.00			
10/06/2014	Enter Client's data	T	hh:mm AM	hh:mm AM	CHERYL	100.00			
10/07/2014	Confirm receipt of any required paperwork.	T	hh:mm AM	hh:mm AM	CHERYL	100.00			
10/13/2014	Confirm that Fee Agreement has been returned	T	hh:mm AM	hh:mm AM	CHERYL	100.00			

Note: When CompuLaw plans are printed, the **Comments** field is included rather than the **Description** field in order to display items with more than 128 character descriptions.

Graphical Calendar Report

Menu

Reports | Graphical Calendar Report

The Graphical Calendar Report displays calendar records in various report styles. You can optionally include the Task List when printing the Graphical Calendar Report. You can change the appearance of the report (i.e., font, font size, etc.) as well as specify the user IDs and dates to be included. The Monthly Report Style on the following page includes the optional Task List.

Daily Report Style

November 7, 2014		November 2014	December 2014
Friday		S M T W T F S	S M T W T F S
(BLANK), CATHY, CHERYL, DAN, JASON, JEN, JPP, KENDRA, MLJ, PAM, ROBERT, RON, STCONV16, STCONV17, UNASSIGN		1	1 2 3 4 5 6
		2 3 4 5 6 7 8	7 8 9 10 11 12 13
		9 10 11 12 13 14 15	14 15 16 17 18 19 20
		16 17 18 19 20 21 22	21 22 23 24 25 26 27
		23 24 25 26 27 28 29	28 29 30 31
		30	
All Day	PAM - Has employer been notified? - Klein/Daniel P. - Klein vs. Simmons Construction		
	PAM - Letter to client re: procedures & releases. - Klein/Daniel P. - Klein vs. Simmons Construction		
8 am	JIM - 8:00am - Meeting with Mike Johnson		
9:00			
10:00			

Weekly Report Style

November 3, 2014 - November 9, 2014		November 2014	December 2014
		S M T W T F S	S M T W T F S
(BLANK), CATHY, CHERYL, DAN, JASON, JEN, JPP, KENDRA, MLJ, PAM, ROBERT, RON, STCONV16, STCONV17, UNASSIGN		1	1 2 3 4 5 6
		2 3 4 5 6 7 8	7 8 9 10 11 12 13
		9 10 11 12 13 14 15	14 15 16 17 18 19 20
		16 17 18 19 20 21 22	21 22 23 24 25 26 27
		23 24 25 26 27 28 29	28 29 30 31
		30	
Monday, November 3, 2014		Thursday, November 6	
<ul style="list-style-type: none"> RON - 3:30pm - Office conference with John Kessler. - Gilbert/Andrew C. - Auto Accident - Room 4 		<ul style="list-style-type: none"> RON - 8:00am - Outside conference with John Kessler. - Gilbert/Andrew C. - Auto Accident - 34th & Center CLB - 11:30am - Meeting with Paul. - Peterson Insurance Co. - Maintenance of Insurance Policies - South Conference Room DAN - 11:30am - Meeting with Paul. - Peterson Insurance Co. - Maintenance of Insurance Policies - South Conference Room JIM - 1:45pm - Office conference with Samantha Kessler. - Gilbert/Andrew C. - Auto Accident - Room 4 	
Tuesday, November 4		Friday, November 7	
<ul style="list-style-type: none"> RON - 8:00am - Outside conference with Paul Franklin. - Peterson Insurance Co. - General Legal Counsel - Peterson Insurance Co. - 5th & Turner DAN - 11:15am - Appointment with Marc Phillips. - Phillips/Marcus. Real Estate Acquisition 1 - 3434 South 45th 		<ul style="list-style-type: none"> PAM - Has employer been notified? - Klein/Daniel P. - Klein vs. Simmons Construction PAM - Letter to client re: procedures & releases. - Klein/Daniel P. - Klein vs. Simmons Construction 	

Weekly Report Style
(with the Daily Style check box selected)

November 17, 2014 - November 21, 2014		November 2014	December 2014
		S M T W T F S	S M T W T F S
DAN, MLJ, ROBERT, RON		1	1 2 3 4 5 6
		2 3 4 5 6 7 8	7 8 9 10 11 12 13
		9 10 11 12 13 14 15	14 15 16 17 18 19 20
		16 17 18 19 20 21 22	21 22 23 24 25 26 27
		23 24 25 26 27 28 29	28 29 30 31
		30	
All Day	Monday, Nov 17, 14	Tuesday, Nov 18	Wednesday, Nov 19
		MLJ - 11:00am - Filing Deadline - Gilbert/Andrew	
8 am		RON - 8:00am - Outside conference with John Williams. - Williams/John - State v. Williams - South Conference Room	
9:00			
	MLJ - 9:30am - Appointment with Harry		
10:00			RON - 9:15am - Meeting with Harold Berk in Conference Room.
	MLJ - 10:30am - Appointment with Jim Peterson - Peterson Insurance Co. - General Legal Counsel		DAN - 9:00am - Deposition of Tom Smith. - Peterson Insurance Co. - Maintenance of Insurance Policies
11:00			RON - 11:15am - Outside

Monthly Report Style

November 2014							December 2014						
S M T W T F S							S M T W T F S						
(BLANK), CATHY, CHERYL, DAN, JASON, JEN, JPP, KENDRA, MLJ, PAM, ROBERT, RON, STCONV16, STCONV17, UNASSIGN													
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Nov 1						
2	3 🚨RON - 3:30pm - Office	4 RON - 8:00am - Outside conference with DAN - 11:15am - Appointment with Marc	5 DAN - 10:45am - Outside conference with JAN - 1:15pm - Appointment with Paul	6 🚨RON - 8:00am - Outside CLB - 11:30am - Meeting with Paul. - Peterso	7 PAM - Has employer been notified? - PAM - Letter to client re: procedures &	8							
9	10 MLJ - 8:30am - Initial Client Meeting	11 RON - Review Escrow Documents. - 🚨JAN - 1:00pm - Office conference	12 MLJ - 11:00am - Filing Deadline - Gilbert/Andrew CLB - 9:00am - Firm Meeting - Conference	13 🚨MLJ - 10:15am - Meeting with RON - 8:00am - Outside conference with	14 KIM - Evaluations to Court in 5 days. JIM - 11:00am - Filing Deadline - Peterson	15							
16	17 JAN - 9:00am - Meeting with potential client RON - 9:15am - Meeting with Harold Berk in	18 ROB - Send referral payment to Mr. Williams. 🚨DAN - 9:00am - Deposition c	19 RON - 12:00pm - Luncheon with Steve. - Billy's	20 RON - 9:00am - Deposition of Bryan Jones. -	21 MLJ - 8:00am - Meeting with Health USA. - CLB - 8:00am - Meeting with Health USA. -	22							
23	24	25 KIM - Confirm date of evaluation(s) JAN - Confirmation of Service. -	26	27 Thanksgiving Day	28 JAN - 1:15pm - Appointment with Paul JAN - 3:30pm - Mediation - Peterson	29							
30	RON - 8:00am - Continuing Legal Education												
Task List													
X	Due_Date	Desc	GroupInfo	User_ID	Start_Time	End_Time							
	11/14/2014	Filing Deadline	JASON	JASON	11:00:00 AM	hh:mm:ss AM							
	11/25/2014	Confirmation of Service.	JEN	JEN	hh:mm:ss AM	hh:mm:ss AM							
	11/25/2014	Verify receipt of employment records by today	JEN	JEN	hh:mm:ss AM	hh:mm:ss AM							
	09/10/2015	Statute expires in 1 year.	JEN	JEN	hh:mm:ss AM	hh:mm:ss AM							

Graphical Task List Report

Menu

Reports | Graphical Task List Report

The Graphical Task List Report displays task calendar records. You can change the appearance (i.e., font, font size, etc.) of the report as well as specify the user IDs and dates to be included. The Calendar Properties program determines the order in which the columns print and the criteria for which tasks are included.

Task List

Task List						
X	Priority	User_ID	Comple Dt	Due_Date	Client_ID	Desc
	5	CHERYL	mm/dd/yyyy	09/30/2014	100.00	Generate Fee Agreement
	5	CHERYL	mm/dd/yyyy	09/30/2014	100.00	Initial Meeting with Client
	5	CHERYL	mm/dd/yyyy	10/03/2014	100.00	Open File
	5	CHERYL	mm/dd/yyyy	10/06/2014	100.00	Enter Client's data
	5	CHERYL	mm/dd/yyyy	10/06/2014	100.00	Confirm receipt of any required paperwork.
	5	CHERYL	mm/dd/yyyy	10/13/2014	100.00	Confirm that Fee Agreement has been returned
	5	JEN	mm/dd/yyyy	10/17/2014	101.00	File Motion to change venue
	0	MLJ	mm/dd/yyyy	10/20/2014	102.00	Filing Deadline
	0	RON	mm/dd/yyyy	10/21/2014	200.02	Filing Deadline

Client Time Summary

Report Writer Name

CLNTTIM

The Client Time Summary report is a Report Writer report included with PracticeMaster and can be modified as desired. The Client Time Summary will generate a list of all fee entries by client for a specified range of Client IDs, dates and timekeepers. The report is sorted by Client ID, date and timekeeper initials. However, the report can optionally be printed in timekeeper order and sorted by timekeeper, Client ID and date. Each timekeeper's list will begin on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014		Client Time Summary		Page: 1
Burns, Jensen & Powers, P.C.				
Client Range:	101.00 to 101.00			
Date Range:	09/01/2014 to 10/31/2014			
Timekeeper Range:	1 to 999			
Client ID:	101.00	Barrett/Karen Apartment Management Real Estate Law		
Date	Tmkr	Hours	Amount	Description
09/08/2014	DHB	0.25	43.75	Telephone conference with client.
	DHB	1.00	175.00	Office conference with client regarding lease agreement.
	RJB	0.43	107.50	Meeting with Ms. Barrett
09/09/2014	DHB	2.00	350.00	Outside conference with Karen Barrett.
09/10/2014	DHB	0.50	87.50	Telephone conference with George Patterson.
	PAM	2.00	320.00	Office conference with Karen concerning the property taxes on apartments at 1715 S. 17th Street and 2519 A' Street.
09/12/2014	DHB	1.00	175.00	Office conference with Ms. Barrett.
09/15/2014	DHB	0.50	87.50	Telephone conference with Ms. Barrett.
	PAM	2.00	320.00	Office conference with Karen Barrett and all of the apartment managers concerning the payment of damage deposits collected.
09/16/2014	DHB	0.50	87.50	Letter to client.
09/28/2014	DHB	1.00	175.00	Telephone conference with client.
	DHB	1.00	175.00	Review and revise lease agreement.
Client Total:		12.18	2,103.75	
Totals:		12.18	2,103.75	

Client Expense Summary

Report Writer Name

CLNTEXP

The Client Expense Summary report is a Report Writer report included with PracticeMaster and can be modified as desired. This report will generate a list of all cost entries for a range of Client IDs, dates and timekeepers. The report is sorted by Client ID, date and timekeeper initials. However, the report can optionally be printed in timekeeper order and sorted by timekeeper, Client ID and date. Each timekeeper's list will begin on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014		Client Expense Summary		Page: 1
Client Range:	101.00 to 102.00			
Date Range:	09/01/2014 to 10/31/2014			
Timekeeper Range:	1 to 999			
Client ID:	101.00	Williams/John State v. Williams		
Date	Tmkr	Amount	Description	
09/08/2014	MLJ	7.55	Long distance telephone charges.	
	MLJ	7.55	Long distance telephone charges.	
	JAM	5.75	Long distance telephone charges.	
	JAM	5.75	Long distance telephone charges.	
09/11/2014	JAM	2.90	Postage.	
	MLJ	7.50	Photocopy charges.	
	JAM	10.50	Long distance telephone charges.	
	JAM	2.90	Postage.	
	JAM	10.50	Long distance telephone charges.	
	MLJ	7.50	Photocopy charges.	
09/12/2014	MLJ	6.75	Long distance telephone charges.	
	MLJ	6.75	Long distance telephone charges.	
09/19/2014	MLJ	2.50	Postage.	
	RPA	8.50	Postage.	
	MLJ	2.50	Postage.	
	RPA	8.50	Postage.	
10/10/2014	RPA	14.50	Courier fee Federal Express.	
10/17/2014	MLJ	75.00	Adoption filing fee.	
	JAM	7.35	Photocopy charges.	
	RPA	30.00	Photocopy charges.	
Client Total:		230.75		
Client ID:	102.00	Federated Casualty, Ltd. Andrew C. Gilbert v. Federated Casualty		
Date	Tmkr	Amount	Description	
09/08/2014	MLJ	60.00	Online research.	
	MLJ	60.00	Online research.	
10/13/2014	MLJ	6.75	Photocopy charges.	
Client Total:		126.75		
Totals:		357.50		

Journal by Type

Report Writer Name **JRNLTYP**E

The Journal by Type Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes journal records sorted by type and by date. You can specify a range of Client IDs and dates as well as which journal record types to include on the report [i.e., T (timer records), P (phone records), R (research records), N (note records), E (e-mail records), B (billing note records)]. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Journal by Date

Report Writer Name **JRNLDAT**E

The Journal by Date Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes journal records sorted by date and by type. You can specify a range of Client IDs and dates as well as which journal record types to include on the report [i.e., T (timer records), P (phone records), R (research records), N (note records), E (e-mail records), B (billing note records)]. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date:	Journal by Type		Page:
11/17/2014			1
Client Range:	200.01 to 200.01	Journal Type(s):	T,P,N,E,B
Date Range:	10/01/2014 to 10/31/2014		
Timer Records			
10/10/2014	Draft and revise Letters to Union Bank and Lincoln Federal regarding status of loans and accounts.		
	User: JEN 08:30 AM Duration: 0:52:13 200.01 Peterson Insurance Co. WC General Legal Counsel		
Phone Records			
10/03/2014	Spoke with Mr. Anderson about setting up a meeting on October 13th at 2:00pm.		
	User: MLJ 10:03 AM Duration: 0:00:00 Spoke With: Yes Returned Call: No Left Message: No Voice Message: No 200.01 Peterson Insurance Co. WC General Legal Counsel		
Case Notes Records			
10/13/2014	Peterson Insurance has requested that we submit our bills to them electronically.		
	User: MLJ 09:59 AM 200.01 Peterson Insurance Co. WC General Legal Counsel		
E-mail Records			
10/06/2014	Mr. Anderson, I need to postpone our meeting on October 12th. I will be out of town until 2:00 pm. Will 3:00 pm work for you?		
	Comments: Mr. Anderson, I need to postpone our meeting on October 12th. I will be out of town until 2:00 pm. Will 3:00 pm work for you?		
	User: RON 02:50 PM To: Mlarson@larson.com CC: From: Mlarson@larson.com BCC: Subject: Meeting Time 200.01 Peterson Insurance Co. WC General Legal Counsel Related Party: Gary J. Olson		

Date:	Journal by Date		Page:
11/17/2014			1
Client Range:	200.01 to 200.01	Journal Type(s):	T,P,N,E,B
Date Range:	10/01/2014 to 10/31/2014		
10/03/2014	Spoke with Mr. Anderson about setting up a meeting on October 13th at 2:00pm.		
	Type: Phone User: MLJ 10:03 AM Duration: 0:00:00 Spoke With: Yes Returned Call: No Left Message: No Voice Message: No 200.01 Peterson Insurance Co. WC General Legal Counsel		
10/06/2014	Mr. Anderson, I need to postpone our meeting on October 12th. I will be out of town until 2:00 pm. Will 3:00 pm work for you?		
	Comments: Mr. Anderson, I need to postpone our meeting on October 12th. I will be out of town until 2:00 pm. Will 3:00 pm work for you?		
	Type: E-mail User: RON 02:50 PM To: Mlarson@larson.com CC: From: Mlarson@larson.com BCC: Subject: Meeting Time 200.01 Peterson Insurance Co. WC General Legal Counsel Related Party: Gary J. Olson		
10/10/2014	Draft and revise Letters to Union Bank and Lincoln Federal regarding status of loans and accounts.		
	Type: Timer User: JEN 08:30 AM Duration: 0:52:13 200.01 Peterson Insurance Co. WC General Legal Counsel		
10/13/2014	Peterson Insurance has requested that we submit our bills to them electronically.		
	Type: Case Note User: MLJ 09:59 AM 200.01 Peterson Insurance Co. WC General Legal Counsel		

Daily Timer Log

Report Writer Name *DAILYTMR*

The Daily Timer Log shows a list of timer records by day. This report can be modified.

Date:		11/17/2014		Daily Timer Log			Page: 1
Date Range:		mm/dd/yyyy to 10/31/2014		Burns, Jensen & Powers, P.C.			
User	Date	First Time	Duration	Hours	Client ID	Description	
MLJ	10/31/2014	11:25 AM	0:26:03	0.43	750.00	Discussed previous owner's responsibilities	
Daily Total:				0.43			
	10/24/2014	12:25 PM	0:36:02	0.60		Potential client, Joseph Harrington. Re: es	
Daily Total:				0.60			
	10/17/2014	10:27 AM	0:43:25	0.72	200.03	George Peterson	
Daily Total:				0.72			
	10/03/2014	10:49 AM	0:59:00	0.98	200.02	Draft and prepare documents needed	
	10/03/2014	11:02 AM	0:52:58	0.88	600.02	Harold re: insurance policies held	
Daily Total:				1.87			
Grand Total:				3.62			

Timer Fee Report

Menu *File | Open | Fee | Edit | Report | Timer Fee Report*

The Timer Fee Report allows you to view or print a fee record and any associated journal tasks used to create the fee record. When displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. This report cannot be modified.

Date:		11/17/2014		Timer Fee Report			Page: 1
Client:		500.00		Burns, Jensen & Powers, P.C.			
Date:	09/08/2014	Description:	Preparation of Legal Documents	Timekeeper:	1, Robert J. Burns	Hours:	0.88
Amount:	220.00						
Record Type	Due Date	Duration	Description				
T	09/08/2014	0.88	Preparation of Legal Documents				
		0.88	Hours				
Client:	101.00	Date:	09/06/2014	Description:	Meeting with Ms. Barrett	Timekeeper:	1, Robert J. Burns
Hours:	0.43	Amount:	107.50				
Record Type	Due Date	Duration	Description				
T	09/05/2014	0.43	Meeting with Ms. Barrett				
		0.43	Hours				
Client:	102.00	Date:	08/25/2014	Description:	Researching real estate values	Timekeeper:	1, Robert J. Burns
Hours:	0.56	Amount:	140.00				
Record Type	Due Date	Duration	Description				
R	08/25/2014	0.56	Researching real estate values				
		0.56	Hours				

Note Report

Report Writer Name *NOTE*

The Note Report allows you to view or print a note record. When displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the associated client record.

Date: 11/17/2014	Note Report Jensen, Martin & Anderson, P.C.		Page: 1
120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
10/24/2014 09:45a KIM			
Mr. Klein suffered a broken leg and a back injury when falling from faulty scaffolding while working. He was working construction at the time for Simmons Construction Company. Mr. Klein missed four months of work. Preliminary information indicates approximate settlement of \$150,000.00 for medical expenses and loss of wages.			

Client Document Management Report

Report Writer Name *_DOCMGMT*

The Client Document Management Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of User IDs and dates. You can also specify the Document Type to be searched as well as enter alpha serial for specific assembled document names. The report is sorted by Client ID, date and timekeeper. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014	Client Document Management Report Jensen, Martin & Anderson, P.C.		Page: 1
Client Range:	to		
Date Range:	mm/dd/yyyy	to 11/17/2014	
Client ID: 100.00 - Larson/Michael			
Larson v. Bel-Cor			
AOP: Workers' Compensation			
Date	Document	Created By	Resp. User
09/16/2014	Tue Assembled\Larson_Michael\100\00\20140916-Referral Letter.doc Description: Referral Letter Contact: Linda M. Roberts Doc Type: Letter Created On: 11/06/2013 02:15 PM Modified On: 09/16/2014 03:26 PM Status: Available	JAN	MLJ
10/17/2014	Fri Assembled\Larson_Michael\100\00\20141017-Medical Records Re Description: Medical Records Request Contact: Medical Arts Associates Doc Type: Medical Records Created On: 11/06/2013 02:15 PM Modified On: 10/17/2014 03:26 PM Status: Available	JAN	JAN
10/17/2014	Fri Assembled\Larson_Michael\100\00\20141017-Fee Agreement.doc Description: Fee Agreement Contact: Michael Larson Doc Type: Fee Agreement Created On: 11/06/2013 02:15 PM Modified On: 10/17/2014 01:51 PM Status: Available	JAN	MLJ
10/17/2014	Fri Assembled\Larson_Michael\100\00\20141017-Employment Record Description: Employment Records Request Contact: Labour Plating Company Doc Type: Records Created On: 11/06/2013 02:15 PM Modified On: 10/17/2014 03:26 PM Status: Available	JAN	MLJ
10/18/2014	Sat Assembled\Larson_Michael\100\00\20141018-Medical Records Au Description: Medical Records Authorization Contact: National Burn Care Center	JAN	JAN

Document Check Out Report

Report Writer Name **_DOCOUT**

The Document Check Out Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of User IDs and dates. You can also search for specific document types or enter a document name to filter your search. The report is sorted by date and User ID. Drill-down editing capabilities allow you to access client records directly from the Preview window.

Date: 11/17/2014			Document Check Out List		Page: 1
			Jensen, Martin & Anderson, P.C.		
User Range: to ZZZ					
Date Range: mm/dd/yyyy to 11/17/2014					
User: Paula Ann Martin					
Check Out Date/Time	Client ID	Client Name	Work Description	Document Name	Document Description
11/06/2014 09:28 AM	101.00	Williams/John	State v. Williams	Assembled\Williams_John\101\00\20140817-Fee Agreement.doc	Fee Agreement
11/11/2014 11:04 AM	850.00	White/Kelly	Divorce	Assembled\White_Kelly\850\00\20141006-Fee Agreement.doc	Fee Agreement
11/12/2014 04:19 PM	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	Assembled\MegaConstruction Corporation\415\00\20141014-Fee Agreement.doc	Fee Agreement
11/17/2014 02:37 PM	100.00	Larson/Michael	Larson v. Bel-Cor	Assembled\Larson_Michael\100\00\20141017-Fee Agreement.doc	Fee Agreement
11/17/2014 02:40 PM	102.00	Gilbert/Andrew C.	Auto Accident	Assembled\Gilbert_Andrew C_\102\00\20140708-Fee Agreement.doc	Fee Agreement

Statute of Limitations Report

Report Writer Name **_STATUTE**

The Statute of Limitations Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of Client IDs, statute of limitation dates and primary timekeepers. The report can optionally be printed in primary timekeeper order. The report is sorted by statute of limitations date and then Client ID. However, if the report is run in timekeeper order, clients are first sorted by primary timekeeper. Each timekeeper's list will begin on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014			Statute of Limitations Report		Page: 1
			Burns, Jensen & Powers, P.C.		
09/09/2014	09/05/2014	OPEN	MLJ	PI	
Client ID: 600.00		File No:			
Client Name: Ace Manufacturing Company		Description: General Legal Counsel			
Contact: Al Jones		5th & Turner			
Malcolm NE 68633		402-435-1739			
10/28/2014	09/08/2014	OPEN	RJB		
Client ID: 550.00		File No:			
Client Name: Federated Casualty, Ltd.		Description: Andrew C. Gilbert v. Federated Casualty			
Contact: Samantha Kessler		2001 South 70th Street			
Suite 300		Lincoln NE 68510			
		402-421-2850			

Client Information

Client ID: 200.01 Jefferson Insurance Co. Automobile Accident AOP ID: PI
Statute of Limitations: 06/10/2016

Alpha Search: JEFFERSON INSURA
American Charter Building
9th & West 'O' Streets
Suite 220
Lincoln NE 68510-6330

Contact Name: Mike Johnson Location: Lincoln
Phone: 402-464-2200 Home Phone:
Fax Phone: 402-464-2202 Cellular Phone: 402-475-2205
E-mail Address: mjohanson@jefferson.com

Misc Description 1: Insured: John G. Schell
Misc Description 2: Policy No: 387-2398528
Misc Description 3: Soc. Sec. No: 501-96-3487

Open Date: 06/16/2014 Close Date: mm/dd/yyyy

Primary Timekeeper: 1
Secondary Timekeeper: 4
Originating Timekeeper: 2

Category: 1 Personal Injury Tax ID:
Inactive: Yes Task Based Billing: No Secure Client: No

Referred By: Farmer's Mutual Health & Life Ins

Opposing Attorney: Mark A. Nelson
County of Filing: Lancaster
State of Jurisdiction: Nebraska
County of Jurisdiction: Lancaster
Court of Jurisdiction: Lancaster District Court
Judge: Martin J. Thomas
Verdict or Outcome: Verdict
Date of Fee Agreement: 06/16/2014 Type of Fee Agreement: Contingency (25%)

Date of Birth: 10/04/1967 Gender: Male
Full Name: Jefferson Insurance Co.
First Name: Last Name: Jefferson Insurance Co.
Salutation:

Area of Practice Information

Other Case Information

Estimated Value of Case: \$50,000.00 Date Last Estimated: 10/10/2014 Client DOB: 08/01/1959

Client's Drivers Lic. #: 2H1464408MLK State of Issue: NE

Type of Injury: Head Trauma
Injury Description: Received major head trauma due to car accident encountered with a reckless driver.

Spouse's Info, if any: Julie Johnson
1456 Main Street
Lincoln, NE 68505
Phone Number: 402-467-4587

Terms of Referral: Case Referred Out?: No
Case Referred In?: Yes
Date Referred?: 06/16/2014

Referred From/To (Name): James Swanson

Phone Number:

Accident Information

Client Summary Report**Report Writer Name****CLNTSUM**

The Client Summary Report shown above and on the following three pages is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of Client IDs. The Client Summary Report is a summary of all information that has been entered for a specific client. The report can be customized for each Area of Practice. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Date: 11/17/2014

Client Summary Report
Burns, Jensen & Powers, P.C.

Page: 2

Date: 06/10/2014
Time: 10:25 PM

Accident Type: Automobile
Location: 24th and O
Description: Brody Johnson ran a stop light and hit the driver's side of Mike's car.

Citation/Ticket Issued?: Yes Number: 1251256697
To: Brody Johnson
By: Rick White

Officer's Name: Rick White Badge #: 2145A

Defendant's Information

Name: Brody Jeffrey Johnson DOB: 10/05/1982
Address: 12478 A Street SSN#: 507-15-1247
Lincoln, NE 68514
Phone Number: 402-412-4597

Driver's License #: H12323898
State License Issued: NE

Attorney Name: Elizabeth M. Knight
Firm Name: Gates, Lewis, Johnson & Stanton
122 Central
Suite 1740
Denver CO 80202
Phone Number: 303-262-6060

Insurance Co.: Nebraska State Insurance Co. Contact: Linda Jennings
Address: 1220 North Liberty
Lincoln NE 68509
Phone Number: 402-477-5888

Agent's Name: Gary J. Olson
Address: 245 19th Street SW
Lincoln NE 68519
Phone Number: 402-423-7788

Adjuster's Name: Gary J. Olson
Address: 245 19th Street SW
Lincoln NE 68519
Phone Number: 402-423-7788

Insured Name:
Policy Holder's Name:
Policy #:
Coverage Type:
Policy Limits: \$0.00 Date of Claim: mm/dd/yyyy
Claim No: Date of Loss: mm/dd/yyyy

Plaintiffs Insurance

Plaintiff's Ins. Co.: Farmer's Mutual Health & Life Ins
Contact Name: Mary Harris
Address: 4500 W. Covington Ave. NE 68503
Lincoln
Phone Number: 402-474-9916

Agent's Name: David M. Roth
Address: 867 Hollyhock Ave. NE 68508
Lincoln
Agent's Phone: 402-474-9876

Adjuster's Name: Gary J. Olson
Address: 245 19th Street SW

Date: 11/17/2014

Client Summary Report
Burns, Jensen & Powers, P.C.

Page: 3

Adjuster's Phone: Lincoln
402-423-7788

NE 68519

Insured Name: Michael L. Johson
Policy Holder's Name: Michael L. Johnson
Policy Number: GUHG-36189
Type of Coverage:
Policy Limits: \$0.00
Claim Number:

Date of Claim: mm/dd/yyyy
Date of Loss: mm/dd/yyyy

Witness

Witness for?: Defense Rating (1=bad to 10=good): 8
Type of Witness:
Witness Name: Russell Harrington
Address: 1479 Y Street
Lincoln, NE 58741
Phone Number: 402-421-4697

Use Witness Again?: Yes
Deposition Date: mm/dd/yyyy
Deposition Time: hh:mm AM
Completed?: No

Licensed in State Name: Years in Profession: 0
License Number: Type:

Medical Services

Medical Provider: Medical Arts Associates
Address: 2390 Hathaway Blvd.
Lincoln NE 68513
Phone Number: 402-474-7956
Patient's Name: Mike Johnson
Doctor's Name: Dr. Mark Wright
Date Treatment Began: 06/10/2014
Date Treatment Ended: 06/17/2014

Amount Billed: \$25,000.00
Amount Covered by Insurance: \$10,000.00

Type of Treatment:

Illness or Condition: Head Trauma

Total Billed \$25,000.00
Total Covered \$10,000.00

Other Attorney of Record

Attorney Name: Joseph M. Lewis
Firm Name: Lewis, Jacobs & Brown
Address: 1500 Park Plaza Bldg.
Suite B
Lincoln NE 68501
Phone Number: 402-474-5861

Reg. Number:

Relationship to Case:

Calendar Records

Date	Completed	Start Time	User ID	Description/Comments
10/26/2014	*	11:00 AM	MLJ	Filing Deadline
10/26/2014		09:30 AM	DHB	Meeting with Roger Nelson Phone 458-9898 at the Best Western
10/25/2014		02:00 PM	ROBERT	Meeting with Roger Nelson Phone 458-9898
10/24/2014		10:45 AM	MLJ	Appointment with Jim Peterson
10/24/2014	*		MLJ	Letter to Charles Rogers
10/24/2014	*	11:00 AM	JASON	Filing Deadline
10/24/2014	*	08:00 AM	DHB	Research
10/19/2014		09:15 AM	MLJ	Attend meeting with Jim Peterson
10/17/2014		10:30 AM	JPP	Consultation
10/17/2014		08:00 AM	DANIEL	Outside conference with John Kessler.
10/17/2014		11:30 AM	CHERYL	Meeting with Paul.
10/17/2014		11:30 AM	DHB	Meeting with Paul.
10/14/2014		03:30 PM	DANIEL	Outside conference with Julie Thomas.

Calendar Entries

* (asterisk) An asterisk next to a calendar entry indicates the calendar entry is a task.

Date	Completed	Start Time	User ID	Description/Comments
10/12/2014		08:00 AM	JASON	Meeting with Mike Johnson.
10/12/2014		03:30 PM	ROBERT	Office conference with John Kessler.
10/12/2014		01:15 PM	ROBERT	Appointment with Paul Franklin.
10/12/2014		10:15 AM	MLJ	Meeting with Robert Maxwell.
10/12/2014		08:00 AM	DHB	Outside conference with Paul Franklin.
10/10/2014		02:30 PM	CHERYL	Meeting with Harold Berk in Conference Room.
10/10/2014		01:00 PM	JPP	Office conference with Richard Jackson.
10/03/2014	*	11:00 AM	DHB	File Motion.

Document Management

Date	Document Name	Creator	For	Description/Comments
06/17/2014	PI200_01Agreement	ROBERT	ROBERT	Fee Agreement

Fee

Date	Inits	Hours	Amount	Description
07/05/2014	RJB	2.00	500.00	Attended deposition.
07/27/2014	DHB	1.00	175.00	Conference with client.
08/10/2014	RJB	2.00	500.00	Office conference with Mike Johnson.
08/17/2014	DHB	1.00	175.00	Telephone conference with doctor/medical personnel.
08/22/2014	DHB	1.00	175.00	Draft answers to interrogatories.
08/24/2014	RJB	1.00	250.00	Revise answers to interrogatories.
10/12/2014	MLJ	1.50	500.00	Office conference with John Kessler.
Totals:		9.50	2275.00	

Cost

Date	Inits	Amount	Description
08/05/2014	RJB	90.00	Outside professional fee
09/02/2014	RJB	6.00	Photocopy charges
09/28/2014	RJB	6.00	Facsimile costs
10/14/2014	RJB	3.00	Facsimile costs
Totals:		105.00	

Journal

Date	Time	User ID	Related Party	Description
	B			06/16/2009 02:25pm ROBERT Mr. Johnson has been released from the hospital. He suffered several broken ribs, cuts, bruises and severe head injuries. He had full coverage on his automobile at the time of the accident. The driver of the other vehicle involved in the accident was not insured at the time of the accident.
06/20/2014	T 09:58 AM	ROBERT		Prepared documents for client.
07/20/2014	T 02:38 PM	CHERYL	Martins/Nancy J.	Prepare financial documents.
09/02/2014	P 01:04 PM	ROBERT	Knight/Elizabeth M.	Phone conference with opposing council.
09/07/2014	T 11:02 AM	PAM	Lancaster District Court	Preparation of Legal Documents
09/14/2014	T 01:03 PM	JPP		Preparation of legal documents.
09/28/2014	R 04:12 PM	(BLANK)		Insurance Web site
10/03/2014	T 10:49 AM	MLJ		Draft and prepare documents needed
10/10/2014	T 01:06 PM	DHB		Prepare brief.
10/17/2014	T 10:27 AM	MLJ	Knight/Elizabeth M.	George Peterson

Journal Entries

Journal Type

The journal type is represented by a single alpha character shown between the Date and Time columns. The journal types include:

- P = Phone record.
- T = Timer record.
- R = Research record.
- E¹ = E-mail record.
- N¹ = Note record.
- B = Billing Notes record (from Tabs3).

¹ Not shown on sample report.

Date: 11/08/2014	Contact Search Report Jensen, Martin & Anderson, P.C.	Page: 1
Whole word search for: PETERSON		
200.01 Peterson Insurance Co. General Legal Counsel <i>Client Name:</i> Peterson Insurance Co. <i>Full Name:</i> Peterson Insurance Co.	Client	Modified: 04/14/2014 Primary: 1 MLJ
200.02 Peterson Insurance Co. Maintenance of Insurance Policies <i>Client Name:</i> Peterson Insurance Co. <i>Full Name:</i> Peterson Insurance Co. <i>First Name:</i> Peterson Insurance C	Client	Modified: 05/10/2014 Primary: 3 RPA
Franklin/Paul Client Contact <i>Organization:</i> Peterson Insurance Co.	Contact	Modified: 11/03/2014
Peterson Insurance Co. Client <i>Full Name:</i> Peterson Insurance Co. <i>Organization:</i> Peterson Insurance Co.	Contact	Modified: 11/03/2014
PETERSON found in 4 records		

Contact Search Report

Menu [Search | Contact Search](#)

The Contact Search Report is generated after every contact search is performed. A Print dialog box is displayed immediately after the search is completed. When the report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill-down to the field and individual record where the contact is located. Each contact found is printed in bold with a shaded background.

Date: 10/19/2014	Conflict of Interest Report Jensen, Martin & Anderson, P.C.	Page: 1
Whole word search for: ABLE		
450.00 Able/Paul & Mary Parent's Estate <i>Client Name:</i> Able /Paul & Mary <i>Alpha Search:</i> Able /Paul & Mary <i>Contact Name:</i> Paul Able	Client	Modified: 05/09/2014 Primary: 2 MLJ
450.00 Able/Paul & Mary Parent's Estate <i>Description:</i> Phone conference with Ms. Knight and clients Paul & Mary Able	Journal: Phone	Modified: 05/09/2014 Primary: 2 MLJ
National Security Life Insurance Insurance Company <i>Comments:</i> Because of NSL's massive client base, they are able to offer a comprehensive selection of	Contact	Modified: 09/07/2014
ABLE found in 3 records		
WORLDQX Conflict Search		
T:\worldox\clients\00000200\01\00000011.DOC WD2002 SR1 Notice T:\worldox\clients\00000450\00\00000021.DOC Letter regarding estate T:\worldox\clients\00000450\00\00000022.DOC Meeting Notes T:\worldox\clients\00000450\00\00000023.DOC Misc Info		
4 matches were found in WORLDQX.		

Conflict of Interest Report

Menu [Search | Conflict of Interest Search](#)

The Conflict of Interest Report is generated after every conflict of interest search is performed. A Print dialog box is displayed immediately after the search is completed. When the report is displayed using the **Preview** option, you can mouse over individual records or documents and with a click of the mouse immediately drill down to the field and individual record or document where the conflict is located.

The report shown to the left includes the Worldox documents that contain the search text.

Date: 10/19/2014	Conflict of Interest Report Jensen, Martin & Anderson, P.C.	Page: 1
Whole word search for: ABLE		
450.00 Able/Paul & Mary Parent's Estate Contact Name: Paul Able Open Date: 05/06/2014 Close Date: mm/dd/yyyy <i>Client Name:</i> Able /Paul & Mary <i>Alpha Search:</i> Able /Paul & Mary <i>Contact Name:</i> Paul Able	Client	Modified: 05/09/2014 Primary: 2 MLJ
450.00 Able/Paul & Mary Parent's Estate Contact: Knight/Elizabeth M. User ID: MLJ <i>Description:</i> Phone conference with Ms. Knight and clients Paul & Mary Able	Journal: Phone	Modified: 05/09/2014 Primary: 2 MLJ
National Security Life Insurance Insurance Company Contact Category: Insurance Company Organization: National Security Life Insurance Last Contact Date: 09/07/2014 <i>Comments:</i> Because of NSL's massive client base, they are able to offer a comprehensive selection of	Contact	Modified: 09/07/2014
ABLE found in 3 records		

Customize the Report

You can customize PracticeMaster to include additional fields on the report. Both Conflict of Interest Reports shown on this page search for the same information; however, the report shown to the left has been customized to include additional fields on the report. Customized fields that are blank will not print on the report.

The boxed areas represent the customized fields on this report.

Date: 11/17/2014 **Conflict of Interest Report** Jensen, Martin & Anderson, P.C. Page: 1

Whole word search for: **ROBERT and WHITE**

850.00 White/Kelly Divorce	Document Management	Modified: 11/12/2014 Primary: 5 KIM
Assembled Doc Name: <u>Affadavit to children.doc</u> -the Marriage of: Kelly Lynn White , Petitioner, and Robert Andrew White , R -children are as follows: Brianne White 2322 South Mopec Drive Los Angeles - Angeles, CA 98084 Ashlea White 201, 22nd Avenue East Los -years is as follows: Brianne White Kelly White & Robert White 2322 South - Angeles, CA 98084 Johnathan White Kelly White & Robert White 201, 22nd A - Angeles, CA 98084 Ashlea White Kelly White & Robert White 201, 22nd Aven -BY HEARING _____ Kelly Lynn White STATE OF NEBRASKA s -Esq. Attorney for Kelly Lynn White November 10, 2014 Filename: Affadavit		
850.00 White/Kelly Divorce	Document Management	Modified: 11/11/2014 Primary: 5 KIM
Assembled Doc Name: <u>Motion for Custody.doc</u> -the Marriage of: Kelly Lynn White , Petitioner, and Robert Andrew White , R		
850.00 White/Kelly Divorce	Additional Client Inf	Modified: 11/11/2014 Primary: 5 KIM
Petitioner's Full Name: Kelly Lynn White Respondent's Full Name: Robert Andrew White		
850.00 White/Kelly Divorce	Spouse's Information	Modified: mm/dd/yyyy Primary: 5 KIM
Spouse's Full Name: Robert White		

ROBERT and WHITE found in 4 records

The boxed areas represent the linked documents results on the PracticeMaster Conflict of Interest Report.

Conflict of Interest Report

(continued)

The Conflict of Interest Report shown to the left includes conflicts found in linked documents. You have the ability to search linked documents and e-mail attachments.

PracticeMaster Files: Each conflict found is printed in bold with a shaded background.

Linked Documents: The linked document is shaded. The name of the field that holds the linked document is shown in italics above the linked document name. Each conflict found is shown on a separate line beginning with a dash, and including surrounding text. Conflicts found are shown in bold.

E-Mail Attachments: The e-mail attachment file name is shaded. Each conflict found is shown on a separate line beginning with a dash, and including surrounding text. Conflicts found are shown in bold.

Date: 11/17/2014 **Document Search Report** Jensen, Martin & Anderson, P.C. Page: 1

Whole word search for: **WHITE**

850.00 White/Kelly Divorce	Journal: E-mail	Modified: 05/13/2014 Primary: 5 KIM
E-mail Attachments: <u>FeeAgmt.pdf</u> -NE 68512 402-423-1440 Kelly Lynn White 201, 122nd Avenue East Los -this agreement. _____ Kelly Lynn White		
850.00 White/Kelly Divorce	Document Management	Modified: 11/11/2014 Primary: 5 KIM
Assembled Doc Name: <u>Affadavit to children.doc</u> -the Marriage of: Kelly Lynn White , Petitioner, and Robert Andrew White , R -children are as follows: Brianne White 2322 South Mopec Drive Los Angeles - Angeles, CA 98084 Ashlea White 201, 22nd Avenue East Los -years is as follows: Brianne White Kelly White & Robert White 2322 South - Angeles, CA 98084 Johnathan White Kelly White & Robert White 201, 22nd A - Angeles, CA 98084 Ashlea White Kelly White & Robert White 201, 22nd Aven -BY HEARING _____ Kelly Lynn White STATE OF NEBRASKA s -Esq. Attorney for Kelly Lynn White November 10, 2014 Filename: Affadavit		
850.00 White/Kelly Divorce	Document Management	Modified: 11/11/2014 Primary: 5 KIM
Assembled Doc Name: <u>Motion for Custody.doc</u> -the Marriage of: Kelly Lynn White , Petitioner, and Robert Andrew White , R		

WHITE found in 3 records

The boxed area represents the e-mail attachment in which the search text was found.

Document Search Report

Menu *Search | Document Search*

The Document Search Report includes information found in linked documents and e-mail attachments that meet the search criteria.

Date: 11/15/2014	Detail Contact List Jensen, Martin & Anderson, P.C.		Page: 1
Category Range:	ATTORNEY to ATTORNEY		
	<u>Contact Category: Attorney</u>		
Bennington & Morris			
Bennington & Morris Bennington & Morris 1900 South Chestnut Suite D Columbus NE 68602	Contact: Murray/Alex J. Work Phone: 402-649-8827		
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	
<hr/>			
Knight/Elizabeth M. Workers' Compensation Law			
Elizabeth M. Knight Gates, Lewis, Johnson & Stanton 122 Central Suite 1740 Denver CO 80202 eknight@gjlslaw.com www.gjlslaw.com	Contact: Carter/Julie Work Phone: 303-262-6060	Fax Phone: 303-262-6061	
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	
<hr/>			
Lacey/Gary Criminal prosecution			
Gary Lacey Lancaster County Attorney Fourth Floor 575 South 10th Street Lincoln NE 68508 http://www.lancaster.ne.gov/	Contact: Work Phone:		
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	

Detail Contact List

Report Writer Name *RP_DET*

The Detail Contact List is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of contacts and contact categories.

Date: 11/17/2014	Summary Contact List Burns, Jensen & Powers, P.C.		Page: 1
Category Range:	ATT to INS		
<u>Attorney</u>	Knight/Elizabeth M. Lewis/Joseph M. Murray/Alex J. Nelson/Mark A. Roberts/Linda M. Wallace/Andrew C. Williams/Harry T.		
<u>Court</u>	Lancaster District Court Lancaster JP Court Nebraska Workers' Compensation Court		
<u>Court Reporter</u>	Brown/Stephanie J.		

Summary Contact List

Report Writer Name *RP_SUM*

The Summary Contact List is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of contacts and contact categories.

Duplicate Contacts Report

Report Writer Name **DUPLICAT**

The Duplicate Contacts Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of contacts in order to quickly identify duplicate contacts present within the software. The report includes a list of Contact IDs and associated Full Names along with a total for the number of duplicate contacts present.

Date: 11/15/2014		Duplicate Contacts		Page: 1
Jensen, Martin & Anderson, P.C.				
Contact ID		Name		
Gilbert/Andrew C. (1)		Gilbert/Andrew C.		
Klein/Daniel P. (1)		Klein/Daniel P.		
Larson/Michael (1)		Larson/Michael		
McBride/John (1)		McBride/John		
Phillips/Marcus (1)		Phillips/Marcus		
White/Kelly (1)		White/Kelly		
White/Kelly (2)		White/Kelly		
White/Kelly (3)		White/Kelly		
Williams/John (1)		John Williams		
Williams/John (2)		John Williams		
Total:	10			

WorkFlow List

Report Writer Name **WORKFLOW**

The WorkFlow List is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of WorkFlows by name. WorkFlows are sorted by File Name and listed alphabetically. Each WorkFlow's Name, File, Inactive Status, Prompt Status, User Activated Status, and message content is included.

Date: 11/15/2014		WorkFlow List				Page: 1
Jensen, Martin & Anderson, P.C.						
WorkFlows for File: CMCAL						
WorkFlow Name		File	Inactive	Prompt	User Activated	
Promo - Add Calendar	Convert this calendar entry to a fee?	CMCAL	No	No	No	
Automate your next step - whether it's converting to fee, updating a client, or adding a task. Just create a PracticeMaster WorkFlow.						
Sample - Start Document Assembly on Task Complete		CMCAL	Yes	Yes	No	
This WorkFlow starts Word Document Assembly using the CMSYSTEM\DOCS\clntltr.dot template whenever a task is marked complete.						
WorkFlows for File: CMCLIENT						
WorkFlow Name		File	Inactive	Prompt	User Activated	
Promo - Add Client	Send this client a fee agreement?	CMCLIENT	No	No	No	
Automate your next step - whether it's sending your fee agreement, scheduling an appointment, or adding a task. Just create a PracticeMaster WorkFlow.						
Sample - Email ADMIN on Critical Field Changes		CMCLIENT	Yes	Yes	No	
This WorkFlow starts an E-mail to ADMIN@YourFirmName.com whenever the name, work description, or location fields change.						
Sample - Schedule Initial Case Assessment		CMCLIENT	Yes	Yes	No	
This WorkFlow creates a calendar entry for one week after the fee agreement date is filled in.						
WorkFlows for File: CMFEE						
WorkFlow Name		File	Inactive	Prompt	User Activated	
Sample - Notify User and Admin when Too Many Hours		CMFEE	Yes	Yes	No	
This WorkFlow creates an eNote and message whenever the hours on a fee record is more than 10 hours.						
Suggestion: This WorkFlow could be improved by changing it to send the eNote automatically to a person who is responsible for preventing overbilling.						

Client File Usage Reports for Contacts

The following two Usage Reports can be used to show all contacts that are associated with a client. The Client ID is shown in the report title. When a report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. These reports cannot be modified.

Contact Usage Report

Menu

File | Open | Client | Edit | Report | Contact Usage

Contact	File	Field Name
Bryan LGH East Hospital	Journal	Contact
Farmer's Mutual Health & Life Ins	Claimant Information	Insurance Company Name
Harris/Mary	Claimant Information	Agent's Name
Labour Plating Company	Document Management	Contact
Larson/Michael	Calendar	Contact
Larson/Michael	Client	Contact Name
Larson/Michael	Client	Client Name
Larson/Michael	Document Management	Contact
Larson/Michael	Journal	Contact
Larson/Michael	Journal	Contact
Lewis/Joseph M.	Client	Opposing Attorney
Lewis/Joseph M.	Related Contacts	Contact
Lincoln Aesthetic & Reconstructive Surgery L L C	Medical Services	Name of Medical Provider
Medical Arts Associates	Document Management	Contact
Medical Arts Associates	Medical Services	Name of Medical Provider
National Burn Care Center	Document Management	Contact
National Burn Care Center	Medical Services	Name of Medical Provider
National Security Life Insurance	Employer's Insurance	Employer's Insurance Co.
Nebraska Workers' Compensation Court	Client	Court of Jurisdiction
Olsen/Douglas A.	Client	Judge
Olson/Gary J.	Claimant Information	Adjuster's Name
Roberts/Linda M.	Client	Referred By
Roberts/Linda M.	Document Management	Contact

Total records found: 23

Contact Usage Report (No Duplicates)

Menu

File | Open | Client | Edit | Report | Contact Usage (No Duplicates)

Contact	File	Field Name
Bryan LGH East Hospital	Journal	Contact
Farmer's Mutual Health & Life Ins	Claimant Information	Insurance Company Name
Harris/Mary	Claimant Information	Agent's Name
Labour Plating Company	Document Management	Contact
Larson/Michael	Calendar	Contact
Lewis/Joseph M.	Client	Opposing Attorney
Lincoln Aesthetic & Reconstructive Surgery L L C	Medical Services	Name of Medical Provider
Medical Arts Associates	Document Management	Contact
National Burn Care Center	Document Management	Contact
National Security Life Insurance	Employer's Insurance	Employer's Insurance Co.
Nebraska Workers' Compensation Court	Client	Court of Jurisdiction
Olsen/Douglas A.	Client	Judge
Olson/Gary J.	Claimant Information	Adjuster's Name
Roberts/Linda M.	Client	Referred By

Total records found: 14

Contact File Usage Reports

The following three Usage Reports can be used to show where a specific contact is used in PracticeMaster data files. When a report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. These reports cannot be modified.

Contact Usage Report

Menu *File | Open | Contact | Edit | Report | Contact Usage*

Date: 11/16/2014		Contact Usage Report				Page: 1
		Jensen, Martin & Anderson, P.C.				
File(s) Searched:	All Files					
Contact ID:	Klein/Daniel P.					
File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Open Workers' Comp Case	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claim filed with W/C Court?	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Fee Agreement signed & sent to W/	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Gather/update medical records.	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Letter to client re: procedures & rele	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Has employer been notified?	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claims Adjuster appointed & contact	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Joint Statement of Evidence	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Initial Client Meeting.	
Client	Client Name	120.01	Klein/Daniel P.	Klein vs. Simmons Construction		
Client	Contact Name	120.01	Klein/Daniel P.	Klein vs. Simmons Construction		
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	10/21/2014 09:45a KIM	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Contact Atty Nelson re: culpability fo	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	scaffolding information	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Conversation with client regarding u	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Researched possible scenarios that	

Total records found: 16

Calendar Contact Usage Report

Menu *File | Open | Contact | Edit | Report | Calendar Contact Usage*

Date: 11/16/2014		Contact Usage Report				Page: 1
		Jensen, Martin & Anderson, P.C.				
File(s) Searched:	Calendar File					
Contact ID:	Klein/Daniel P.					
File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Open Workers' Comp Case	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claim filed with W/C Court?	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Fee Agreement signed & sent to W/	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Gather/update medical records.	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Letter to client re: procedures & rele	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Has employer been notified?	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claims Adjuster appointed & contact	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Joint Statement of Evidence	
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Initial Client Meeting.	

Total records found: 9

Journal Contact Usage Report

Menu *File | Open | Contact | Edit | Report | Journal Contact Usage*

Date: 11/16/2014		Contact Usage Report				Page: 1
		Jensen, Martin & Anderson, P.C.				
File(s) Searched:	Journal File					
Contact ID:	Klein/Daniel P.					
File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	10/21/2014 09:45a KIM	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Contact Atty Nelson re: culpability fo	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	scaffolding information	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Conversation with client regarding u	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Researched possible scenarios that	

Total records found: 5

Lookup File Usage Reports

The following Usage Reports can be used to show where specific lookup records are used in PracticeMaster data files. When a report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. These reports cannot be modified.

Timekeeper Usage Report

Menu *File | Open | All Other Files | Lookup Files | Billing Files | Timekeeper | Edit | Report | Usage Report*

Date: 11/17/2014		Usage Report			Page: 1
Burns, Jensen & Powers, P.C.					
Searched Value: 3					
From File: Timekeeper					
File	AOP	Field	Client ID	Client Name	Client Desc
Client	System Files	Sec_Tkpr	100.00	Dawson/Charles L.	Settlement of Grandfather's Estate
Client	System Files	Sec_Tkpr	101.00	Barrett/Karen	Apartment Management
Client	System Files	Sec_Tkpr	200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm
Client	System Files	Sec_Tkpr	300.00	McBride/John	Management of Estate Trust
Client	System Files	Sec_Tkpr	500.00	Lyons/Mr. & Mrs. Art	Audit of Federal Income Taxes
Client	System Files	Sec_Tkpr	600.02	Ace Manufacturing Company	Maintenance of insurance policies
Client	System Files	Sec_Tkpr	700.00	First National Bank	General File
Fee	System Files	Timekeeper	101.00	Barrett/Karen	Apartment Management
Fee	System Files	Timekeeper	101.00	Barrett/Karen	Apartment Management
Fee	System Files	Timekeeper	200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance
Fee	System Files	Timekeeper	200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance
Fee	System Files	Timekeeper	200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance
Fee	System Files	Timekeeper	400.00	Lutz/Jody	Manage trust account for Jody
Fee	System Files	Timekeeper	402.00	Kiltzer/George	Set up trust for children
Fee	System Files	Timekeeper	600.02	Ace Manufacturing Company	Maintenance of insurance policies
Fee	System Files	Timekeeper	600.02	Ace Manufacturing Company	Maintenance of insurance policies
Fee	System Files	Timekeeper	600.02	Ace Manufacturing Company	Maintenance of insurance policies
Fee	System Files	Timekeeper	850.00	White/Kelly	Divorce
Fee	System Files	Timekeeper	850.00	White/Kelly	Divorce
Fee	System Files	Timekeeper	850.00	White/Kelly	Divorce

Total records found: 20

Transaction Code Usage Report

Menu *File | Open | All Other Files | Lookup Files | Billing Files | Transaction Code | Edit | Report | Usage Report*

Date: 11/17/2014		Usage Report			Page: 1
Burns, Jensen & Powers, P.C.					
Searched Value: 2					
From File: Transaction Code					
File	AOP	Field	Client ID	Client Name	Client Desc
Fee	System Files	Tcode	101.00	Barrett/Karen	Apartment Management
Fee	System Files	Tcode	102.00	Richardson/Harold	Manage personal finances
Fee	System Files	Tcode	200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm
Fee	System Files	Tcode	200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm
Fee	System Files	Tcode	600.00	Ace Manufacturing Company	General Legal Counsel
Fee	System Files	Tcode	600.00	Ace Manufacturing Company	General Legal Counsel
Fee	System Files	Tcode	600.01	Ace Manufacturing Company	Workers' compensation claim
Fee	System Files	Tcode	600.01	Ace Manufacturing Company	Workers' compensation claim

Total records found: 8

Task Code Usage Report

Menu *File | Open | All Other Files | Lookup Files | Billing Files | Task Code | Edit | Report | Usage Report*

Date: 11/17/2014		Usage Report			Page: 1
Burns, Jensen & Powers, P.C.					
Searched Value: L110					
From File: Task Code					
File	AOP	Field	Client ID	Client Name	Client Desc
Fee	System Files	Phase_Task	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty
Fee	System Files	Phase_Task	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty
Fee	System Files	Phase_Task	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty
Cost	System Files	Phase_Task	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty

Total records found: 4

Location Usage Report

Menu *File | Open | All Other Files | Lookup Files | Billing Files | Location | Edit | Report | Usage Report*

Date: 11/17/2014		Usage Report				Page: 1
		Burns, Jensen & Powers, P.C.				
Searched Value:	Lincoln					
From File:	Location					
File	AOP	Field	Client ID	Client Name	Client Desc	
Client	System Files	Location	101.00	Barrett/Karen	Apartment Management	
Client	System Files	Location	200.01	Jefferson Insurance Co.	Automobile Accident	
Client	System Files	Location	200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm	
Client	System Files	Location	200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance	
Client	System Files	Location	300.00	McBride/John	Management of Estate Trust	
Client	System Files	Location	350.00	Carter/Arthur J.	Protection of New Wave Patent	
Client	System Files	Location	400.00	Lutz/Jody	Manage trust account for Jody	
Client	System Files	Location	402.00	Kiltzer/George	Set up trust for children	
Client	System Files	Location	550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty	
Client	System Files	Location	700.00	First National Bank	General File	
Client	System Files	Location	750.00	Harrison Investments	Purchase of Real Estate	
Client	System Files	Location	850.00	White/Kelly	Divorce	
Client	System Files	Location	900.00	Sherman/Natalie K.	Divorce	

Total records found: 13

Calendar Code Usage Report

Menu *File | Open | All Other Files | Lookup Files | Calendar Code | Edit | Report | Usage Report*

Date: 11/17/2014		Usage Report				Page: 1
		Burns, Jensen & Powers, P.C.				
Searched Value:	OutCW					
From File:	Calendar Code					
File	AOP	Field	Client ID	Client Name	Client Desc	
Calendar	System Files	Calendar_Code		Client not found in client file		
Calendar	System Files	Calendar_Code	100.00	Dawson/Charles L.	Settlement of Grandfather's Estate	
Calendar	System Files	Calendar_Code	100.00	Dawson/Charles L.	Settlement of Grandfather's Estate	
Calendar	System Files	Calendar_Code	101.00	Barrett/Karen	Apartment Management	
Calendar	System Files	Calendar_Code	101.00	Barrett/Karen	Apartment Management	
Calendar	System Files	Calendar_Code	101.00	Barrett/Karen	Apartment Management	
Calendar	System Files	Calendar_Code	102.00	Richardson/Harold	Manage personal finances	
Calendar	System Files	Calendar_Code	200.01	Jefferson Insurance Co.	Automobile Accident	

Total records found: 8

Category Usage Report

Menu *File | Open | All Other Files | Lookup Files | Billing Files | Category | Edit | Report | Usage Report*

Date: 11/17/2014		Usage Report				Page: 1
		Burns, Jensen & Powers, P.C.				
Searched Value:	10					
From File:	Category					
File	AOP	Field	Client ID	Client Name	Client Desc	
Client	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	
Fee	System Files	Category	600.01	Ace Manufacturing Company	Workers' compensation claim	

Total records found: 16

Primary Timekeeper 1: Paula Ann Martin
From: 08/19/2014 Thru 11/17/2014

Client	Name	AOP	Last Date	Activity	User ID
211.00	Markis/Julie Workman's Compensation	WC	05/06/2014	Timer	CLIFF
150.00	Johnsen/Kierra Family Law	FAMILY	06/13/2014	Research	CATHY
313.00	Freeman/Chase Civil Suit		07/11/2014	Fee	CLIFF
254.00	Ogden/Livia Custody case	FAMILY	07/29/2014	Cost	CATHY
145.00	Tran/Sun civil suit		07/29/2014	Phone	ADAM
171.00	Smith/John Custody	FAMILY	07/29/2014	Email	SUSAN
150.01	Johnsen/Kierra Divorce	FAMILY	08/05/2014	Client Note	ADAM
101.00	Williams/John State v. Williams	CRIMLAW	08/18/2014	Client Opened	SUSAN

Client Inactivity Report

Menu [Reports | Client Inactivity Report](#)

The Client Inactivity Report above can be used to easily identify clients and cases with no activity in a specified time frame. This report helps you determine which cases need follow up and makes it easy to identify cases that should be marked inactive. The period of inactivity can be defined as the last number of days, weeks, months, or years. The ability to load and save report definitions, as well as designate a default report definition are available in the Client Inactivity Report. When the report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill-down to the record containing the last activity for the client.

Definitions

Client	Client ID.
Name	Client name. Listed under the Name is the Work Description of the client.
AOP	Area of Practice of the client. If the client is not assigned to an Area of Practice, no value will be shown.
Last Date	The date of last activity for the client, based on the date in the associated record.
	<p>Calendar File The Date Completed field is used. If the Date Completed is mm/dd/yyyy, the Due Date field will be used instead.</p> <p>Journal File In Note, E-mail, Phone, Timer and Research records, the Date field is used.</p> <p>Document Management File The Date field is used.</p> <p>Fee File The Date field is used.</p> <p>Cost File The Date field is used.</p> <p>Common Client Related Files The Last Modified date that is stored in the record header is used. This information cannot be viewed in the software.</p> <p>Area of Practice Files The Last Modified date that is stored in the record header is used. This information cannot be viewed in the software.</p>
Activity	The type of record that contains the last activity for the client.
User ID	Name of the user who entered the last activity for the client.
(Pri)	Primary timekeeper assigned to the client. This column is included when a Report Order other than Primary Timekeeper is selected.

Note: When selecting items, both Work-In-Process and Archived transactions will be searched.

Activity Note: The Date Opened and Date Closed fields in the Client file are considered activity. Therefore, if the value of the client's Date Opened or Date Closed field falls within the time frame specified, the client will not be included on the report.

Multi-Record Processing Log

This report can be displayed when using the **Replace All** feature of Find and Replace. Included on the report is the User ID of the PracticeMaster user who performed the Replace All and the time at which it was run. The file for which the Replace All was run is listed, followed by whether or not the **Replace Entire Field** option was selected. The text replaced is shown with the text with which it was replaced. A count of replaced records is shown. The replaced fields are then listed along with the original text underlined, and the replacement text underlined. This log file can only be printed while the Find and Replace results are shown. Once the Find and Replace window is closed, the log file is deleted and can no longer be printed.

You can use the Load Record function while in the associated Editor window to retrieve record by specifying the record number.

Date: 11/17/2014	Multi-Record Processing Log Jensen, Martin & Anderson, P.C.	Page: 1
User: DAN Time: 10:04:35 AM File: CMSYSTEM\CMCAL Replacing Entire Field: No Replacing Marc Phillips with Marcus Phillips		
Replace completed, 2 of 2 replacements made.		
Replaced Field: Description for Record Number: 2463 Appointment with <u>Marc Phillips</u> . Appointment with <u>Marcus Phillips</u> .		
Replaced Field: Description for Record Number: 2417 Outside conference with <u>Marc Phillips</u> . Outside conference with <u>Marcus Phillips</u> .		

System Files

This section consists of printed file definitions and screen shots of the System Files. The table shown below includes descriptions for the columns in the File Definition reports. The Table of Contents includes a list of the File Definitions.

- ❑ The File List at the bottom of this page is a printed report in PracticeMaster that lists the System Files. To print this report, from File Maintenance, right-click **System Files** and select **Print System Files List**.
- ❑ To print all file definitions for the System Files, from File Maintenance, right-click **System Files** and select **Print File Definitions for All System Files**.

Column Definitions on a File Definition Report	
Field ID	The Field ID is the field's short name.
Field Name	The Field Name is the field's long name and allows spaces and other special characters.
Type	The field type indicates how the field is treated.
Prot	Indicates whether the field is protected.
Req	Indicates whether the field is required.
Spl	Indicates whether the field should be automatically spell checked.
Hist	Indicates whether history tracking should be enabled for the field.
Cnflt	Indicates whether the contents of the field should be included in conflict of interest searches. An asterisk ("*") right of this column indicates the field will be included in contact searches. A plus sign "+" left of this column indicates the field will be printed on the conflict report and contact report.
Rep	Indicates whether the contents of the field should be copied to a new record when the Replicate function is used.
Len	Indicates the field length.
Dec	Indicates the number of decimal places for number type fields.
Min Value	Indicates the optional minimum value for number type fields.
Max Value	Indicates the optional maximum value for number type fields.

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Client File (legal)	36-37
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Fee File	45
Cost File	46
Calendar Code File	47
Timekeeper File	48
Category File	49
Transaction Code File	50
Task Code File	51
Location File	51
Related Contacts File	52
eNote File	53

Date: 11/17/2014		File List		Page: 1	
Jensen, Martin & Anderson, P.C.					
System Files					
Name	Description				
CMCLIENT	Client				
CMJRNL	Journal				
CMCAL	Calendar				
CMDOCMGT	Document Management				
CMFEE	Fee				
CMCOST	Cost				
CMRELATE	Contact				
CMCALCOD	Calendar Code				
CMEEMPL	Timekeeper				
CMCAT	Category				
CMTCODE	Transaction Code				
CMTBCODE	Task Code				
CMLOC	Location				
CMMACRO	Text Macro				
CMSECCAS	Secure Client				
CMRELLNK	Contact Category				
CMAUDIT	Record History				
CMENOTE	eNote				
CMWKFLOW	WorkFlow				
CMBILLTO	Bill To				
CMOLLOG	Outlook Sync Log				
CMDOCTYP	Document Type				
CMDOCVSN	Document Version				
RELCONTCT	Related Contacts				

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMCLIENT
File Description : Client
File Type : Variable
Fixed Record Size : 1,866
Number of indexes : 9
Number of fields : 84
Number of records : 12

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Name	Client Name	Contact	Y	N	N	Y	Y*	Y	54	0		
Contact	Contact Name	Contact	Y	N	N	Y	Y*	Y	54	0		
Alpha_Search	Name Search	Alpha	Y	N	N	Y	Y	Y	16	0		
Client_Full_Name	Client Full Name	Enhanced Virtual	Y	N	N	N	N	N	50	0		
Contact_Full_Name	Contact Full Name	Enhanced Virtual	Y	N	N	N	N	N	50	0		
Addr_No	Address Number	Short	Y	N	N	Y	N	Y	2	0		
Email_Addr_No	E-mail Address Number	Short	Y	N	N	Y	N	Y	2	0		
Addr1	Address Line 1	Enhanced Virtual	Y	N	N	N	N	N	35	0		
Addr2	Address Line 2	Enhanced Virtual	Y	N	N	N	N	N	35	0		
Addr3	Address Line 3	Enhanced Virtual	Y	N	N	N	N	N	35	0		
City	City	Enhanced Virtual	Y	N	N	N	N	N	20	0		
State	State	Enhanced Virtual	Y	N	N	N	N	N	3	0		
Zip	Zip Code	Enhanced Virtual	Y	N	N	N	N	N	10	0		
Country	Country	Enhanced Virtual	Y	N	N	N	N	N	20	0		
Phone1	Phone 1	Enhanced Virtual	Y	N	N	N	Y*	N	31	0		
Phone2	Phone 2	Enhanced Virtual	Y	N	N	N	Y*	N	31	0		
Phone3	Phone 3	Enhanced Virtual	Y	N	N	N	Y*	N	31	0		
Phone4	Phone 4	Enhanced Virtual	Y	N	N	N	Y*	N	31	0		
Email_Address	E-mail Address	Enhanced Virtual	Y	N	N	N	Y*	N	100	0		
Web_Page	Web Page	Enhanced Virtual	Y	N	N	N	Y*	N	1023	0		
Phone1_Src	Phone 1 Source	Alpha	Y	N	N	N	N	Y	20	0		
Phone2_Src	Phone 2 Source	Alpha	Y	N	N	N	N	Y	20	0		
Phone3_Src	Phone 3 Source	Alpha	Y	N	N	N	N	Y	20	0		
Phone4_Src	Phone 4 Source	Alpha	Y	N	N	N	N	Y	20	0		
Phone	Phone	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Fax_Phone	Fax Phone	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Home_Phone	Home Phone	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Cellular_Phone	Mobile Phone	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Alt_Addr1	Alt Address Line 1	Alpha	Y	N	N	Y	N	Y	35	0		
Alt_Addr2	Alt Address Line 2	Alpha	Y	N	N	Y	N	Y	35	0		
Alt_Addr3	Alt Address Line 3	Alpha	Y	N	N	Y	N	Y	35	0		
Alt_City	Alt City	Alpha	Y	N	N	Y	N	Y	20	0		
Alt_State	Alt State	Alpha	Y	N	N	Y	N	Y	3	0		
Alt_Zip	Alt Zip Code	Alpha	Y	N	N	Y	N	Y	10	0		
Alt_Country	Alt Country	Alpha	Y	N	N	Y	N	Y	20	0		
Alt_Work_Phone	Alt Business Phone	Phone	Y	N	N	Y	N	Y	31	0		
Alt_Work_Fax	Alt Business Fax	Phone	Y	N	N	Y	N	Y	31	0		
Alt_Home_Phone	Alt Home Phone	Phone	Y	N	N	Y	N	Y	31	0		
Alt_Cellular_Phone	Alt Mobile Phone	Phone	Y	N	N	Y	N	Y	31	0		
Alt_Email_Address	Alt E-mail Address	E-Mail	Y	N	N	Y	N	Y	100	0		
Alt_Web_Page	Alt Web Page	Web Page	Y	N	N	Y	N	Y	1023	0		
Location	Location	LOCATION	Y	N	N	N	N	Y	8	0		
Desc	Work Description	Alpha	Y	N	N	Y	Y	N	50	0		
Task_Based_Billing	Task Based Billing	Boolean	Y	N	N	N	N	Y	1	0		
Inactive	Inactive	Boolean	Y	N	N	Y	N	N	1	0		
Secure_Client	Secure Client	Boolean	Y	N	N	N	N	Y	1	0		
Misc_1	Misc Description 1	Alpha	Y	N	N	Y	Y	N	50	0		
Misc_2	Misc Description 2	Alpha	Y	N	N	Y	Y	N	50	0		
Misc_3	Misc Description 3	Alpha	Y	N	N	Y	Y	N	50	0		
Date_Open	Date Opened	Date	Y	Y	N	Y	N	N	4	0		
Close_Date	Date Closed	Date	Y	N	N	Y	N	N	4	0		
Prim_Tkpr	Primary Tkpr	Timekeeper	Y	Y	N	N	N	Y	2	0		999
Sec_Tkpr	Secondary Tkpr	Timekeeper	Y	Y	N	N	N	Y	2	0		999
Orig_Tkpr	Originating Tkpr	Timekeeper	Y	Y	N	N	N	Y	2	0		999
Category	Category	Category	Y	Y	N	N	N	Y	2	0		999
T3_Integration	Tab3 Integration	Boolean	Y	N	N	N	N	N	1	0		
QB_Integration	QuickBooks Integration	Boolean	Y	N	N	N	N	N	1	0		
QBEEditSeq	QB Edit Sequence	Alpha	Y	N	N	N	N	N	39	0		
QBListID	QB List ID	Alpha	Y	N	N	N	N	N	39	0		
AOP	Area of Practice	AOP ID	Y	N	N	N	N	N	8	0		
Tax_ID	Tax ID	Alpha	N	N	N	Y	N	N	15	0		
Client_Photo	Client Photo	File	Y	N	N	N	N	N	260	0		
Referred_By	Referred By	Contact	N	N	N	N	N	N	54	0		
Style	Style	Alpha	N	N	N	N	Y	N	60	0		
Ref_No	File Reference Number	Alpha	N	N	N	N	N	N	15	0		
Stat_Limit	Statute of Limitations	Date	N	N	N	Y	N	N	4	0		
Opp_Atty	Opposing Attorney	Contact	N	N	N	N	N	N	54	0		
FiL_County	County of Filing	Alpha	N	N	N	N	N	N	20	0		
State_Jurs	State of Jurisdiction	Alpha	N	N	N	N	N	N	15	0		
Conty_Jurs	County of Jurisdiction	Alpha	N	N	N	N	N	N	20	0		
Court_Jurs	Court of Jurisdiction	Contact	N	N	N	N	N	N	54	0		
Judge	Judge	Contact	N	N	N	N	N	N	54	0		

Date: 11/17/2014 Page: 2

File Definition
Jensen, Martin & Anderson, P.C.

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnfl	Rep	Len	Dec	Min Value	Max Value
Verdict	Verdict or Outcome	Alpha	N	N	N	N	N	N	10	0		
Agree_Date	Date of Fee Agreement	Date	N	N	N	N	N	N	4	0		
Agree_Type	Type of Fee Agreement	Alpha	N	N	N	N	N	N	60	0		
DOB	Date of Birth	Virtual	N	N	N	N	N	N	4	0		
Gender	Gender	Virtual	N	N	N	N	N	N	14	0		
Full_Name	Full Name	Virtual	N	N	N	N	N	N	50	0		
First_Name	First Name	Virtual	N	N	N	N	N	N	20	0		
Last_Name	Last Name	Virtual	N	N	N	N	N	N	30	0		
Salutation	Salutation	Virtual	N	N	N	N	N	N	20	0		
Comments	Comments	Memo	N	N	Y	Y	Y	N	45000	0		
Profile	Profile	Memo	N	N	N	N	N	N	45000	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client ID	Client ID	Y	<Client_ID>
2	Alternate Search	Alternate (Alpha) Search	Y	<Alpha_Search><Client_ID>
3	AoP ClientID	Lookup by AoP/ClientID	Y	<AOP><Client_ID>
4	Name	Name	Y	<NAME><SECURE_CLIENT><CLIENT_ID>
5	Contact	Contact	Y	<CONTACT><SECURE_CLIENT><CLIENT_ID>
6	Active	Inactive/Active	N	<Inactive><Client_ID>
7	Billing	Billing	N	<Category><Location><Task_Based_Billing>
8	Attorney	Attorney	N	<Prim_Tkpr><Sec_Tkpr><Orig_Tkpr>
9	Location	Location	N	<Location><City>

CMCLIENT - Client File, Page 2

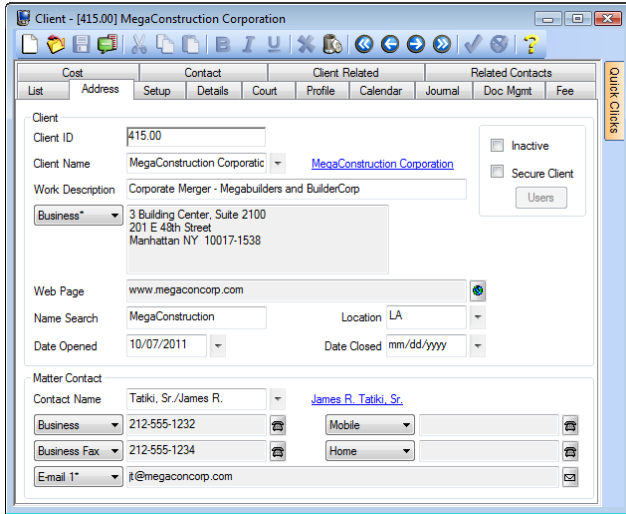


Fig. D-1, Address Tab in the Client File

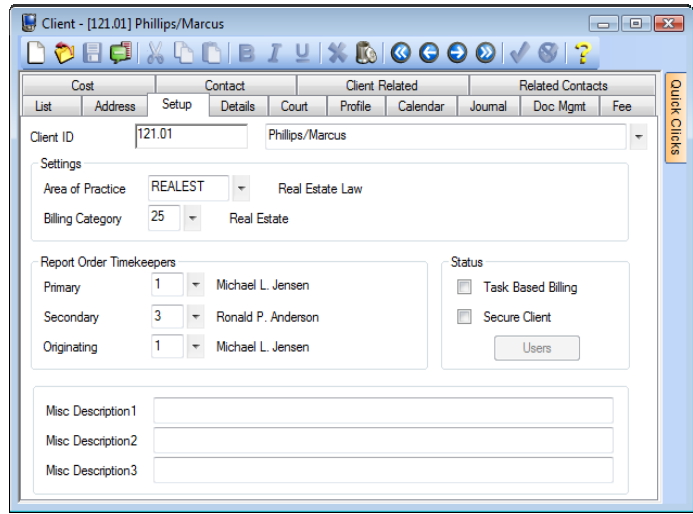


Fig. D-2, Setup Tab in the Client File

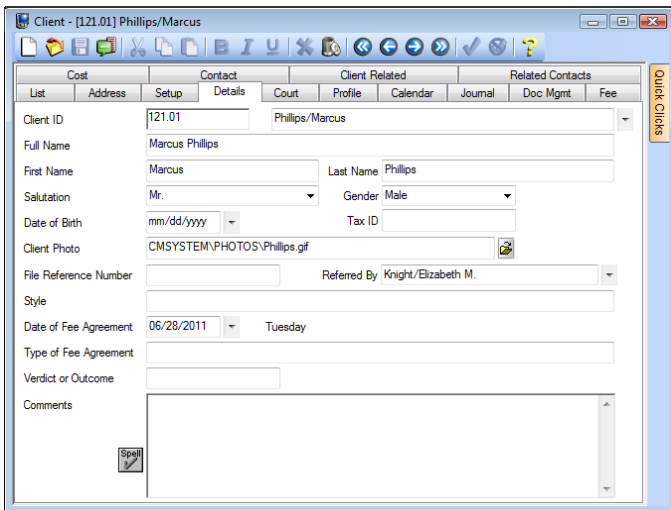


Fig. D-3, Details Tab in the Client File

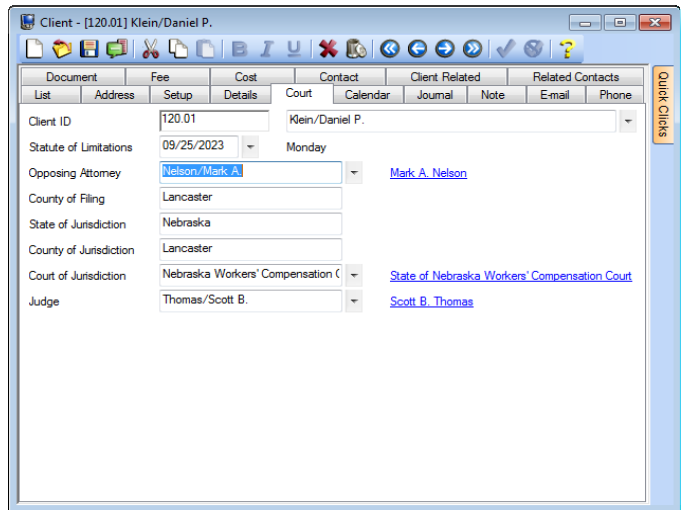


Fig. D-4, Court Tab in the Client File

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMRELATE
File Description : Contact
File Type : Variable
Fixed Record Size : 1,992
Number of indexes : 3
Number of fields : 86
Number of records : 82

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
RP_Key	Contact ID	Contact	Y	Y	N	N	N	N	54	0		
RP_Cat	Contact Category	RPCAT	Y	N	N	Y	N	N	650	0		
Name	Full Name	Alpha	Y	N	N	Y	Y*	N	50	0		
Organization	Organization	Alpha	Y	N	N	Y	Y*	N	50	0		
Org_Sw	Organization Sw	Boolean	Y	N	N	Y	N	N	1	0		
Inactive	Inactive	Boolean	Y	N	N	Y	N	N	1	0		
County	County	Alpha	N	N	N	Y	N	N	20	0		
Addr1	Address Line 1	Enhanced Virtual	Y	N	N	N	N	N	35	0		
Addr2	Address Line 2	Enhanced Virtual	Y	N	N	N	N	N	35	0		
Addr3	Address Line 3	Enhanced Virtual	Y	N	N	N	N	N	35	0		
City	City	Enhanced Virtual	Y	N	N	N	N	N	20	0		
State	State	Enhanced Virtual	Y	N	N	N	N	N	3	0		
Zip	Zip	Enhanced Virtual	Y	N	N	N	N	N	10	0		
Country	Country	Enhanced Virtual	Y	N	N	N	N	N	20	0		
Phone1	Phone 1	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Phone2	Phone 2	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Phone3	Phone 3	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Phone4	Phone 4	Enhanced Virtual	Y	N	N	N	N	N	31	0		
Email_Address	E-mail Address	Enhanced Virtual	Y	N	N	N	N	N	100	0		
Web_Page	Web Page	Web Page	Y	N	N	Y	Y*	N	1023	0		
Addr_No	Default Address No	Short	Y	N	N	Y	N	N	2	0		
Addr1_Line1	Bus Addr 1	Alpha	Y	N	N	Y	N	N	35	0		
Addr1_Line2	Bus Addr 2	Alpha	Y	N	N	Y	N	N	35	0		
Addr1_Line3	Bus Addr 3	Alpha	Y	N	N	Y	N	N	35	0		
Addr1_City	Bus City	Alpha	Y	N	N	Y	N	N	20	0		
Addr1_State	Bus State	Alpha	Y	N	N	Y	N	N	3	0		
Addr1_Zip	Bus Zip	Alpha	Y	N	N	Y	N	N	10	0		
Addr1_Country	Bus Country	Alpha	Y	N	N	Y	N	N	20	0		
Addr2_Line1	Home Addr 1	Alpha	Y	N	N	Y	N	N	35	0		
Addr2_Line2	Home Addr 2	Alpha	Y	N	N	Y	N	N	35	0		
Addr2_Line3	Home Addr 3	Alpha	Y	N	N	Y	N	N	35	0		
Addr2_City	Home City	Alpha	Y	N	N	Y	N	N	20	0		
Addr2_State	Home State	Alpha	Y	N	N	Y	N	N	3	0		
Addr2_Zip	Home Zip	Alpha	Y	N	N	Y	N	N	10	0		
Addr2_Country	Home Country	Alpha	Y	N	N	Y	N	N	20	0		
Addr3_Line1	Other Addr 1	Alpha	Y	N	N	Y	N	N	35	0		
Addr3_Line2	Other Addr 2	Alpha	Y	N	N	Y	N	N	35	0		
Addr3_Line3	Other Addr 3	Alpha	Y	N	N	Y	N	N	35	0		
Addr3_City	Other City	Alpha	Y	N	N	Y	N	N	20	0		
Addr3_State	Other State	Alpha	Y	N	N	Y	N	N	3	0		
Addr3_Zip	Other Zip	Alpha	Y	N	N	Y	N	N	10	0		
Addr3_Country	Other Country	Alpha	Y	N	N	Y	N	N	20	0		
Phone1_Src	Phone 1 Source	Alpha	Y	N	N	N	N	N	20	0		
Phone2_Src	Phone 2 Source	Alpha	Y	N	N	N	N	N	20	0		
Phone3_Src	Phone 3 Source	Alpha	Y	N	N	N	N	N	20	0		
Phone4_Src	Phone 4 Source	Alpha	Y	N	N	N	N	N	20	0		
Assistant_Phone	Assistant Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Work_Phone	Business Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Work_Phone2	Business Phone 2	Phone	Y	N	N	Y	Y*	N	31	0		
Work_Fax	Business Fax	Phone	Y	N	N	Y	Y*	N	31	0		
Callback	Callback	Phone	Y	N	N	Y	Y*	N	31	0		
Car_Phone	Car Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Company_Phone	Company Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Home_Phone	Home Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Home_Phone2	Home Phone 2	Phone	Y	N	N	Y	Y*	N	31	0		
Home_Fax	Home Fax	Phone	Y	N	N	Y	Y*	N	31	0		
ISDN	ISDN	Phone	Y	N	N	Y	Y*	N	31	0		
Cellular_Phone	Mobile Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Other_Phone	Other Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Other_Fax	Other Fax	Phone	Y	N	N	Y	Y*	N	31	0		
Pager	Pager	Phone	Y	N	N	Y	Y*	N	31	0		
Primary_Phone	Primary Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Radio_Phone	Radio Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Telex	Telex	Phone	Y	N	N	Y	Y*	N	31	0		
TTY_TDD_Phone	TTY/TDD Phone	Phone	Y	N	N	Y	Y*	N	31	0		
Email_Address1	E-mail Address 1	E-Mail	Y	N	N	Y	Y*	N	100	0		
Email_Address2	E-mail Address 2	E-Mail	Y	N	N	Y	Y*	N	100	0		
Email_Address3	E-mail Address 3	E-Mail	Y	N	N	Y	Y*	N	100	0		
RP_Photo	Contact Photo	File	Y	N	N	N	N	N	260	0		
Comments	Comments	Memo	Y	N	Y	Y	Y	N	45000	0		
GroupInfo	Group Info	Memo	Y	N	N	Y	N	N	1000	0		
Do_Not_Sync	Do Not Sync	Boolean	Y	N	N	Y	N	N	1	0		
T3_Integration	Tab3 Integration	Boolean	Y	N	N	N	N	N	1	0		

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Salutation	Salutation	Alpha	N	N	N	N	N	N	20	0		
First_Name	First Name	Alpha	N	N	N	N	Y*	N	20	0		
Last_Name	Last Name	Alpha	N	N	N	N	Y*	N	30	0		
Contact_1	Contact Name	Alpha	N	N	N	Y	Y*	N	25	0		
Contact_2	Secondary Contact Name	Alpha	N	N	N	Y	Y*	N	25	0		
First_Date	First Contact Date	Date	N	N	N	Y	N	N	4	0		
Last_Date	Last Contact Date	Date	N	N	N	Y	N	N	4	0		
Reg_No	Registration Number	Alpha	N	N	N	Y	N	N	15	0		
Specialty	Specialty	Alpha	N	N	N	Y	N	N	50	0		
Background	General Background	Alpha	N	N	N	Y	N	N	60	0		
DOB	Date of Birth	Date	N	N	N	N	N	N	4	0		
Gender	Gender	Alpha	N	N	N	N	N	N	14	0		
IntegID	Integration ID	Memo	Y	N	N	N	N	N	45000	0		

Index	Index ID	Index Description	Protected	Sort Order
1	RelPty Key	Contact ID	Y	<RP_Key>
2	Organization	Organization	Y	<Organization>
3	Category	Category	N	<RP_Cat><RP_Key>

CMRELATE - Contact File, Page 2

Contact - Knight/Elizabeth M.

Contact ID: Knight/Elizabeth M. | Category: Attorney
 Full Name: Elizabeth M. Knight
 Organization: Gates, Lewis, Johnson & Stanton
 Business*: 122 Central Suite 1740, Denver CO 80202
 County:
 Business: 303-262-6060 | Home:
 Business Fax: 303-262-6061 | Mobile:
 E-mail 1*: eknight@gjslaw.com
 Web Page: www.gjslaw.com
 User/Group: ALL

Fig. D-5, **Contact** Tab in the Contact File

Contact - Knight/Elizabeth M.

Contact ID: Knight/Elizabeth M.
 First Name: Elizabeth | Last Name: Knight
 Salutation: Ms. | SS / Reg Number:
 Gender: Female | Date of Birth: 03/19/1965 | Friday
 Contact Name: Carter/Julie | Secondary Contact: James/Thomas
 First Contact Date: mm/dd/yyyy | Last Contact Date: mm/dd/yyyy
 Photo: Cmsystem\Photos\Knight.gif
 Specialty: Workers' Compensation Law
 General Background: Admitted to Colorado Bar in 9/91
 Comments:
 Spell

Fig. D-6, **Misc** Tab in the Contact File

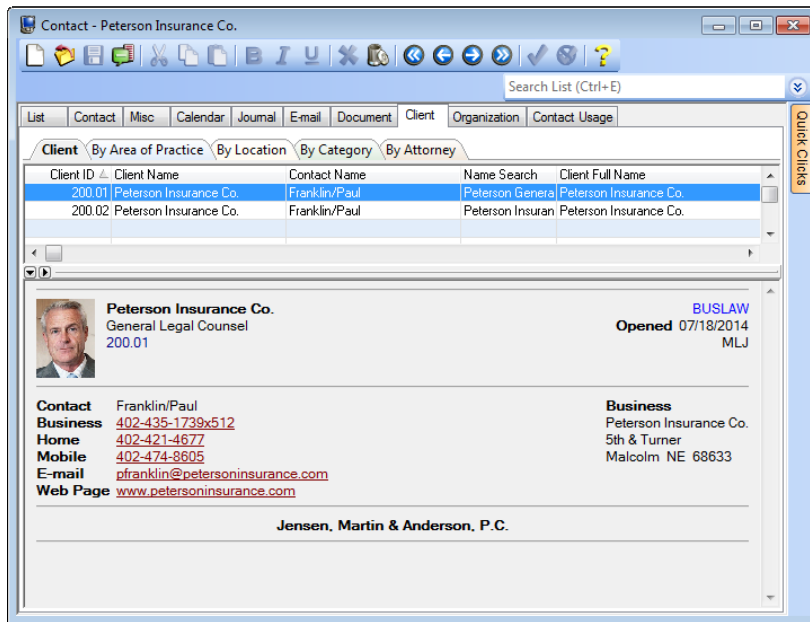


Fig. D-7, Client Tab in the Contact File

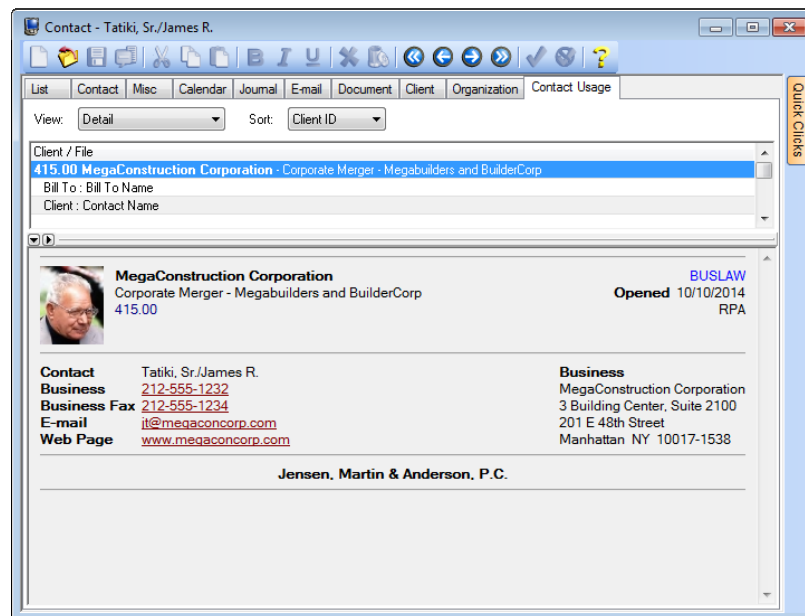


Fig. D-8, Contact Usage Tab in the Contact File

AOP Name : CMSYSTEM
AOP Description : System Files
 File Name : CMCAL
 File Description : Calendar
 File Type : Variable
 Fixed Record Size : 523
 Number of indexes : 13
 Number of fields : 37
 Number of records : 133

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Due_Date	Due Date	Date	Y	N	N	Y	N	N	4	0		
Compleat_Dt	Date Completed	Date	Y	N	N	Y	N	N	4	0		
Calendar_Code	Calendar Code	Calendar Code	Y	N	N	N	N	N	8	0		
Location	Location	Memo	Y	N	N	N	N	N	128	0		
Desc	Description	Alpha	Y	N	N	Y	Y	N	128	0		
Comments	Comments	Memo	Y	N	Y	N	Y	N	45000	0		
Type	Type	Alpha	Y	Y	N	N	N	N	1	0		
Start_Time	Time Start	Time	Y	N	N	Y	N	N	4	0		
End_Time	Time End	Time	Y	N	N	Y	N	N	4	0		
User/GroupInfo	User/Group	Memo	Y	N	N	N	N	N	1000	0		
Client_ID	Client ID	Client ID	Y	N	N	N	N	N	13	0		
Related_Party	Contact	Y	N	N	N	N	N	N	54	0		
User_ID	User ID	User	Y	N	N	Y	N	N	8	0		
Priority	Priority	Short	Y	N	N	Y	N	N	2	0	0	9
Private	Private	Boolean	Y	N	N	Y	N	N	1	0		
AlarmExpr	Alarm	Alpha	Y	N	N	Y	N	N	80	0		
Reminder1	Reminder 1	Date	Y	N	N	N	N	N	4	0		
Reminder2	Reminder 2	Date	Y	N	N	N	N	N	4	0		
Reminder3	Reminder 3	Date	Y	N	N	N	N	N	4	0		
Client_Name	Client Name	Virtual	Y	N	N	N	N	N	54	0		
Rule	Rule	Memo	Y	N	N	N	N	N	128	0		
LinkNo	Link Number	Long	Y	N	N	N	N	N	4	0		
IntegID	Integration ID	Memo	Y	N	N	N	N	N	199	0		
Pri_Key_Date_SeqNo	Pri Key Date SeqNo	Long	Y	N	N	N	N	N	4	0		
Sec_Key_Date_SeqNo	Sec Key Date SeqNo	Long	Y	N	N	N	N	N	4	0		
Root_SeqNo	Root SeqNo	Long	Y	N	N	N	N	N	4	0		
Orig_Template_SeqNo	Orig Template SeqNo	Long	Y	N	N	N	N	N	4	0		
Fee_SeqNo	Fee SeqNo	Long	Y	N	N	N	N	N	4	0		
Status	Status	Alpha	Y	N	N	N	N	N	1	0		
CLMisc	CLMisc	Memo	Y	N	N	N	N	N	128	0		
PlanVars	PlanVars	Memo	Y	N	N	N	N	N	45000	0		
CLActive	CLActive	Boolean	Y	N	N	N	N	N	1	0		
Client_Work_Desc	Client Work Desc	Virtual	N	N	N	N	N	N	50	0		
Client_Desc	Client Work Desc	Virtual	Y	N	N	N	N	N	50	0		
SnoozeDate	Snooze Date	Date	Y	N	N	N	N	N	4	0		
SnoozeTime	Snooze Time	Time	Y	N	N	N	N	N	4	0		
SnoozeVerification	Snooze Verification	Alpha	Y	N	N	N	N	N	110	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client (Due Date)	Client/Due Date/Start Time	Y	<Client_ID><Due_Date><Start_Time><Entry Order>
2	Due Date	All Records by Due Date/Start Time	Y	<Due_Date><Start_Time><Entry Order>
3	Client (Entry Order)	For Document Assembly	Y	<Client_ID><Entry Order>
4	Events Only	Events Only - User/Due Date	Y	<User_ID><Due_Date><Start_Time><Entry Order>
5	Tasks Only	Tasks Only - User/Completion Date	Y	<User_ID><Compleat_Dt><Due_Date><Priority><Entry Order>
6	Root Seq No	For Internal Use	Y	<Root_SeqNo><Entry Order>
7	Key Date Seq No	For Internal Use	Y	<Pri_Key_Date_SeqNo>
8	Link Number	For Internal Use	Y	<LinkNo>
9	Reminder 1	For Internal Use	Y	<Type><User_ID><Reminder1><Start_Time>
10	Reminder 2	For Internal Use	Y	<Type><User_ID><Reminder2><Start_Time>
11	Reminder 3	For Internal Use	Y	<Type><User_ID><Reminder3><Start_Time>
12	Alarm Index	For Internal Use	Y	<User_ID><Due_Date><Start_Time><AlarmExpr>
13	CompuLaw Plans	For Internal Use	Y	<Root_SeqNo><Due_Date>

CMCAL - Calendar File

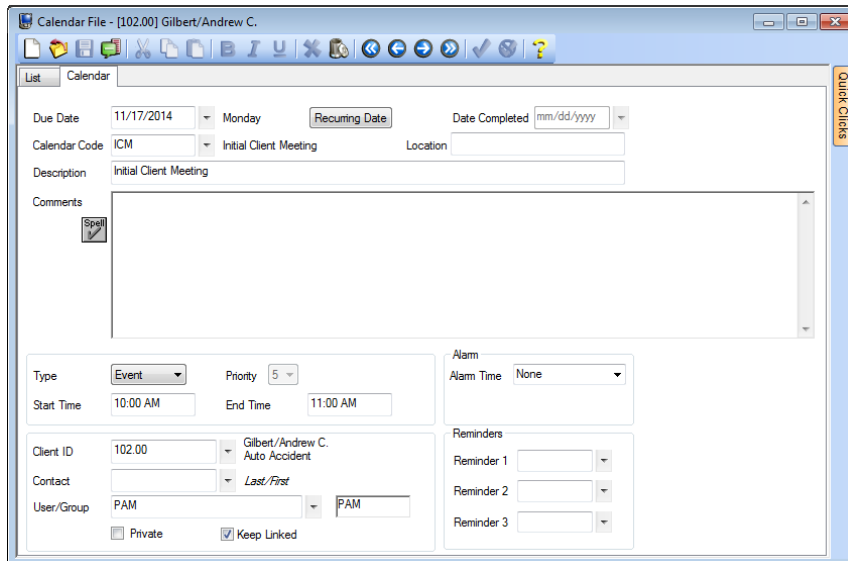


Fig. D-9, Calendar Tab in the Calendar File

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMJRNL
File Description : Journal
File Type : Variable
Fixed Record Size : 277
Number of indexes : 8
Number of fields : 33
Number of records : 28

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnftt	Rep	Len	Dec	Min Value	Max Value
Record_Type	Record Type	Alpha	Y	Y	N	N	N	N	1	0		
Date	Date	Date	Y	N	N	Y	N	N	4	0		
Time	Time	Time	Y	N	N	N	N	N	4	0		
Duration	Duration	Alpha	Y	N	N	N	N	N	11	0		
Status	Status	Alpha	Y	N	N	N	N	N	1	0		
Desc	Description	Memo	Y	N	Y	Y	Y	N	45000	0		
Client_ID	Client ID	Client ID	Y	N	N	N	N	N	13	0		
Related_Party	Contact	Contact	Y	N	N	N	N	N	54	0		
User_ID	User ID	User	Y	N	N	Y	N	N	8	0		
Sent_Received	Sent/Received	Alpha	N	N	N	N	N	N	1	0		
To_From	To/From	E-Mail	N	N	N	Y	N	N	45000	0		
Subject	Subject	Alpha	Y	N	N	N	Y	N	60	0		
Spoke_With	Spoke With	Boolean	Y	N	N	N	N	N	1	0		
Returned_Call	Returned Call	Boolean	Y	N	N	N	N	N	1	0		
Left_Message	Left Message	Boolean	Y	N	N	N	N	N	1	0		
Voice_Message	Voice Message	Boolean	Y	N	N	N	N	N	1	0		
User_Updating	User Updating	User	Y	N	N	N	N	N	8	0		
First_Date	First Date	Date	Y	N	N	N	N	N	4	0		
Last_Date	Last Date	Date	Y	N	N	N	N	N	4	0		
First_Time	First Time	Time	Y	N	N	N	N	N	4	0		
Last_Time	Last Time	Time	Y	N	N	N	N	N	4	0		
Date_Time	Duration	Time Span	Y	N	N	N	N	N	10000	0		
Fee_SeqNo	Fee SeqNo	Long	Y	N	N	N	N	N	4	0		
Research_URL	Research URL	Web Page	Y	N	N	N	N	N	1023	0		
Research_File	Research File	File	Y	N	N	N	N	N	260	0		
Email_Body	E-mail Body	HTML Edit	Y	N	N	N	Y	N	0	0		
Email_Attachments	E-mail Attachments	Archive Edit	Y	N	N	N	N	N	0	0		
Email_To	To	E-Mail	Y	N	N	N	N	N	45000	0		
Email_From	From	E-Mail	Y	N	N	N	N	N	100	0		
Email_CC	CC	E-Mail	Y	N	N	N	N	N	45000	0		
Email_BCC	BCC	E-Mail	Y	N	N	N	N	N	45000	0		
Phone_No	Phone #	Phone	Y	N	N	N	Y	N	31	0		
Orig_Email	Original E-mail	Archive Edit	Y	N	N	N	N	N	0	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client_Date	Client/Date Order	Y	<Client_ID><Date><Time><Entry Order>
2	Client	Client/Entry Order	Y	<Client_ID><Entry Order>
3	Internal_1	For Internal Use	Y	<User_Updating>
4	Type/Client	Type/Client	Y	<Record_Type><Client_ID><Entry Order>
5	Internal_2	For Internal Use	Y	<Fee_SeqNo>
6	Timer Only	For Visual Timer Display	Y	<User_ID><Last_Date><Entry Order>
7	Status	Process Timer by Client/Date	Y	<Status><Client_ID><Date><Time>
8	ClientType	Client/Type/Date	N	<Client_ID><Record_Type><Date><Time><Entry Order>

CMJRNL - Journal File

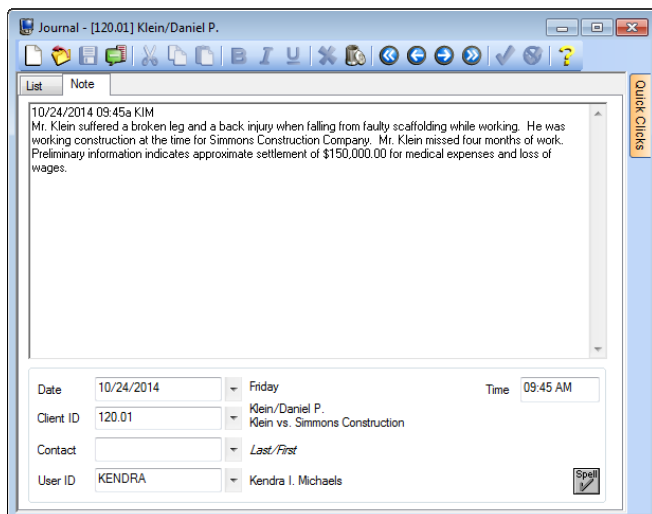


Fig. D-10, Note Tab in the Journal File

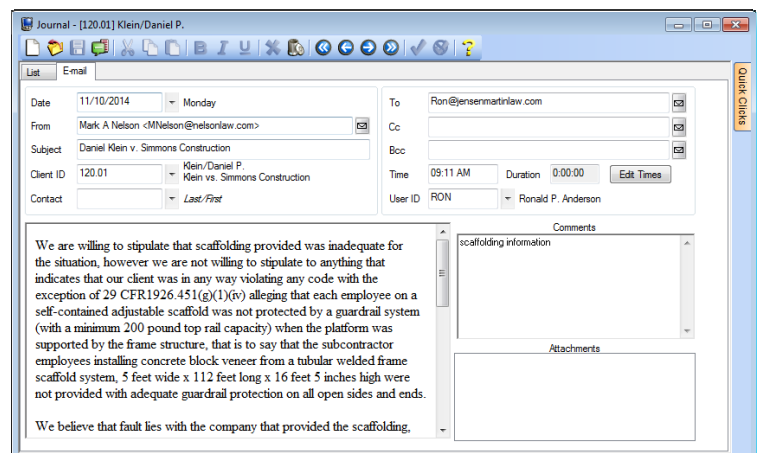


Fig. D-11, E-mail Tab in the Journal File

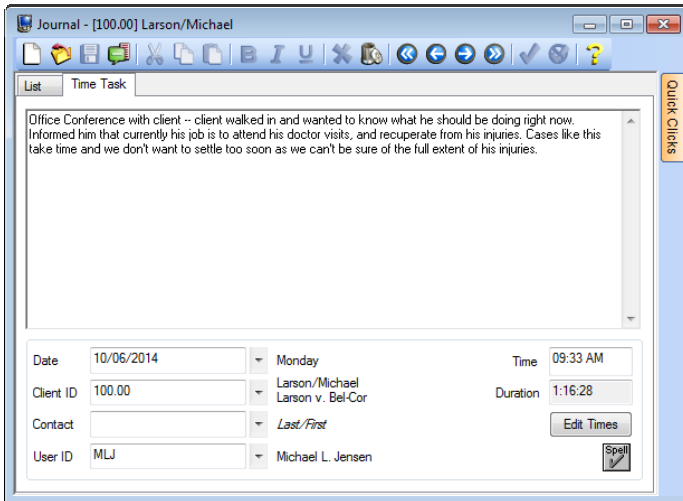


Fig. D-12, Time Task Tab in the Journal File

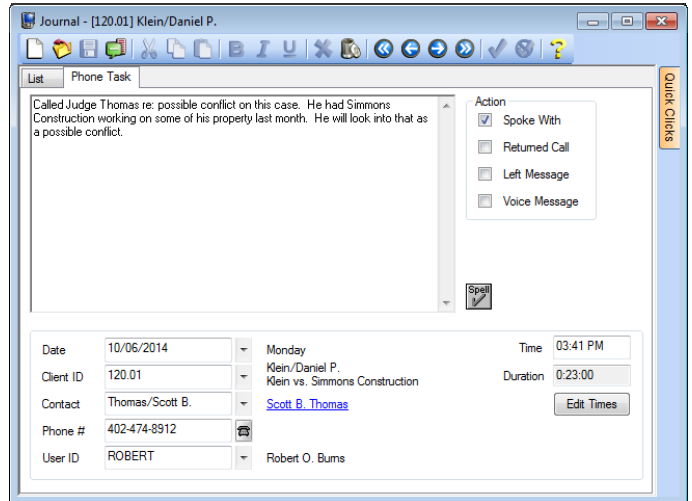


Fig. D-13, Phone Task Tab in the Journal File

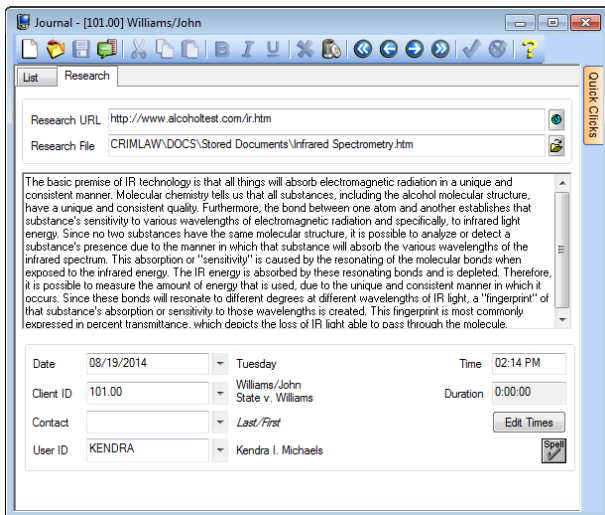


Fig. D-14, Research Tab in the Journal File

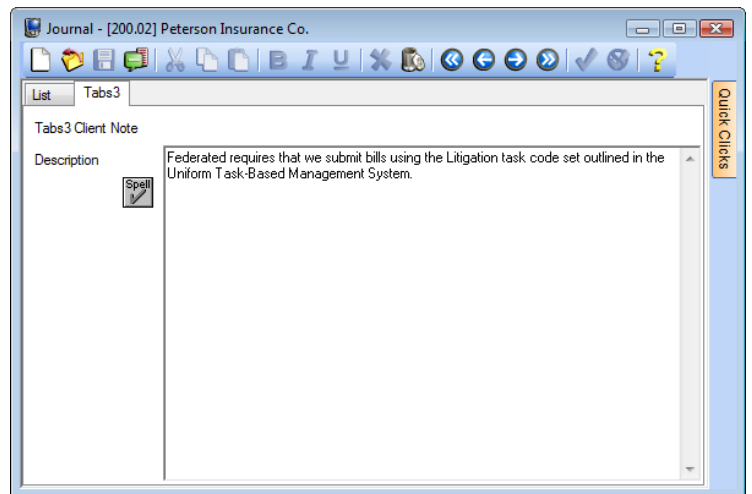


Fig. D-15, Tabs3 Tab in the Journal File

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMDOCMGT
 File Description : Document Management
 File Type : Variable
 Fixed Record Size : 464
 Number of indexes : 12
 Number of fields : 38
 Number of records : 24

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Date	Date	Date	Y	N	N	N	N	N	4	0		
Resp	Responsible	User	Y	N	N	N	N	N	8	0		
User_ID	Created By	User	Y	N	N	N	N	N	8	0		
To_Whom	To Whom Directed	Alpha	Y	N	N	N	Y	N	40	0		
Desc	Description	Alpha	Y	N	Y	N	Y	N	128	0		
Location	Location	Alpha	N	N	N	N	N	N	20	0		
Coded_Doc	Coded Doc Name	File	Y	N	N	N	N	N	259	0		
Assemb_Doc	Document Name	File	Y	N	N	N	N	N	259	0		
Comments	Comments	Memo	Y	N	Y	N	Y	N	45000	0		
Coded_Name_Only	Coded Doc Name Only	Alpha	N	N	N	N	N	N	31	0		
Assemb_Name_Only	Assembled Doc Name Only	Alpha	Y	N	N	N	N	N	31	0		
Related_Party	Contact	Contact	Y	N	N	N	N	N	54	0		
Doc_Type	Document Type	Document Type	Y	N	N	N	N	N	12	0		
Protect_Sw	Protect Document	Boolean	Y	N	N	N	N	N	1	0		
Manage_Sw	Manage Document Name	Boolean	Y	N	N	N	N	N	1	0		
Manage-Token	Manage Token	Long	Y	N	N	N	N	N	4	0		
Check_Out_Sw	Checkout Switch	Boolean	Y	N	N	Y	N	N	1	0		
Check_Out_User	Checkout User	User	Y	N	N	N	N	N	8	0		
Check_Out_Date	Checkout Date	Date	Y	N	N	N	N	N	4	0		
Check_Out_Time	Checkout Time	Time	Y	N	N	N	N	N	4	0		
Check_Out_Version	Checkout Version	Long	Y	N	N	Y	N	N	4	0	0	999
Check_Out	Status	Virtual	Y	N	N	N	N	N	50	0		
File_TypeInfo	File Extension	Virtual	Y	N	N	N	N	N	519	0		
File_Created	Created On	Virtual	Y	N	N	N	N	N	32	0		
File_Modified	Modified On	Virtual	Y	N	N	N	N	N	32	0		
Fee_Status	Convert to Fee Status	Alpha	Y	N	N	N	N	N	1	0		
Fee_SeqNo	Fee Record	Long	Y	N	N	N	N	N	4	0		
Jrnl_SeqNo	Journal Record	Long	Y	N	N	N	N	N	4	0		
Version_Cnt	Versions	Long	Y	N	N	N	N	N	4	0	0	999
Manage_Loc	Manage Location	Memo	Y	N	N	N	N	N	259	0		
Check_Out_Loc	Checkout Location	File	Y	N	N	N	N	N	259	0		
File_Extension	File Extension	Enhanced Virtual	Y	N	N	N	N	N	259	0		
Attachment_FileName	Journal Attachment Filename	Memo	Y	N	N	N	N	N	259	0		
File_Created_Date	Created Date	Enhanced Virtual	Y	N	N	N	N	N	4	0		
File_Created_Time	Created Time	Enhanced Virtual	Y	N	N	N	N	N	4	0		
File_Modified_Date	Modified Date	Enhanced Virtual	Y	N	N	N	N	N	4	0		
File_Modified_Time	Modified Time	Enhanced Virtual	Y	N	N	N	N	N	4	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client	Client/Entry Order	Y	<Client_ID><Entry Order>
2	Document Name Only	For Internal Use	Y	<Assemb_Name_Only>
3	User Checkouts	User Checkouts	Y	<Check_Out_Sw><Check_Out_User><Check_Out_Date><Check_Out_Time><Entry Order>
4	All Checkouts	All Checkouts	Y	<Check_Out_Sw><Check_Out_Date><Check_Out_Time><Check_Out_User><Entry Order>
5	Document Type	Document Type	Y	<Doc_Type><Entry Order>
6	File Extension	File Extension	Y	<File_Extension><Entry Order>
7	Client/Doc_Type	Client/Doc_Type	Y	<Client_ID><Doc_Type><Entry Order>
8	Client/File Extension	Client/File Extension	Y	<Client_ID><File_Extension><Entry Order>
9	JrnlSeqNo/Attachment Filename	JrnlSeqNo/Attachment Filename	Y	<Jrnl_SeqNo><Attachment_FileName><Entry Order>
10	Date Generated	Date Generated	N	<Date><Client_ID>
11	Performed By	Performed By	N	<User_ID><Date>
12	Responsible	Responsible	N	<Resp><Date>

CMDOCMGT - Document Management File

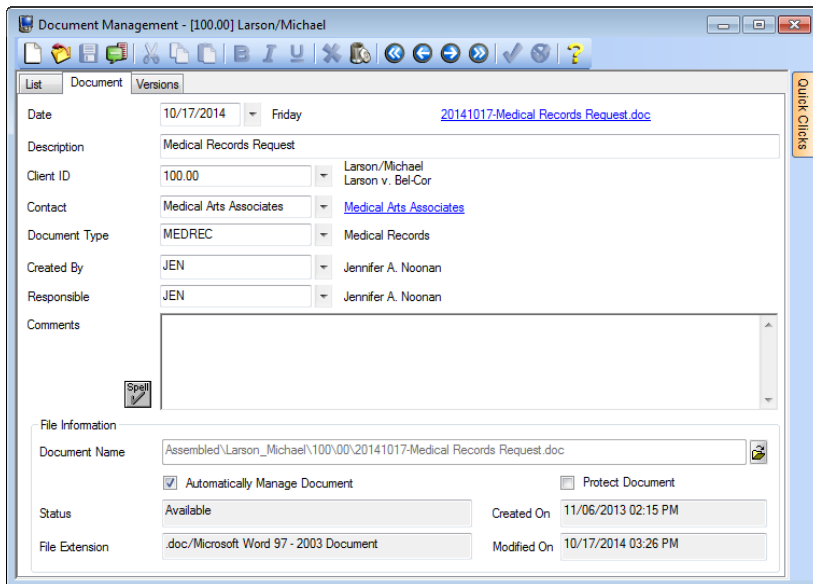


Fig. D-16, Doc Mgmt Tab in the Document Management File

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMFEE
File Description : Fee
File Type : Variable
Fixed Record Size : 230
Number of indexes : 9
Number of fields : 23
Number of records : 586

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Timekeeper	Timekeeper Number	Timekeeper	Y	Y	N	N	N	N	2	0	1	999
Category	Category	Category	Y	Y	N	N	N	N	2	0	1	999
Date	Date	Date	Y	Y	N	Y	N	N	4	0		
Tcode	Tcode	Tcode	Y	Y	N	N	N	N	2	0	1	999
Phase_Task	Phase/Task	Task Code	Y	N	N	N	N	N	6	0		
Activity	Activity	Task Code	Y	N	N	N	N	N	6	0		
Bill_Code	Bill Code	Short	Y	N	N	N	N	N	2	0		
Hold	Status	Character	Y	N	N	N	N	N	1	0		
Rate	Rate	Number	Y	N	N	N	N	N	8	2	0.00	
Hours	Hours to Bill	Number	Y	N	N	Y	N	N	8	2	-999.99	9999.99
Amount	Amount	Money	Y	N	N	Y	N	N	8	2		
Description	Description	Memo	Y	N	Y	Y	Y	N	5000	0		
Archived	Archived Transaction	Boolean	Y	N	N	N	N	N	1	0		
Stmnt_Date	Statement Date	Date	Y	N	N	N	N	N	4	0		
Stmnt_Num	Statement Number	Long	Y	N	N	N	N	N	4	0		
Worked_Hours	Hours Worked	Number	Y	N	N	Y	N	N	8	2	-999.99	9999.99
Mirror_Seq_No	Mirror Seq No	Long	Y	N	N	N	N	N	4	0		
QBEEditSeq	QB Edit Sequence	Alpha	Y	N	N	N	N	N	39	0		
QBTxnID	QB Trans ID	Alpha	Y	N	N	N	N	N	39	0		
User_ID	User ID	User	Y	N	N	N	N	N	8	0		
Create_Date	Creation Date	Date	Y	N	N	N	N	N	4	0		
Create_Time	Creation Time	Time	Y	N	N	N	N	N	4	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client/Seq	Client/Entry Order	Y	<Client_ID><Entry Order>
2	Arch/Mirror/SeqNo	For Internal Use	Y	<Archived><Mirror_Seq_No><Entry Order>
3	Arch/SeqNo	For Internal Use	Y	<Archived><Entry Order>
4	QBTxnID	QuickBooks TxnID	Y	<QBTxnID>
5	Tcode	For Internal Use	Y	<Tcode>
6	Activity	For Internal Use	Y	<Activity>
7	Client/Arch	For Internal Use	Y	<Client_ID><Archived>
8	TKpr/Arch/Date/SeqNo	Timekeeper/Archived/Date/Entry Order	Y	<Timekeeper><Archived><Date><Entry Order>
9	TKpr/Date	Timekeeper/Date	N	<Timekeeper><Date>

CMFEE - Fee File

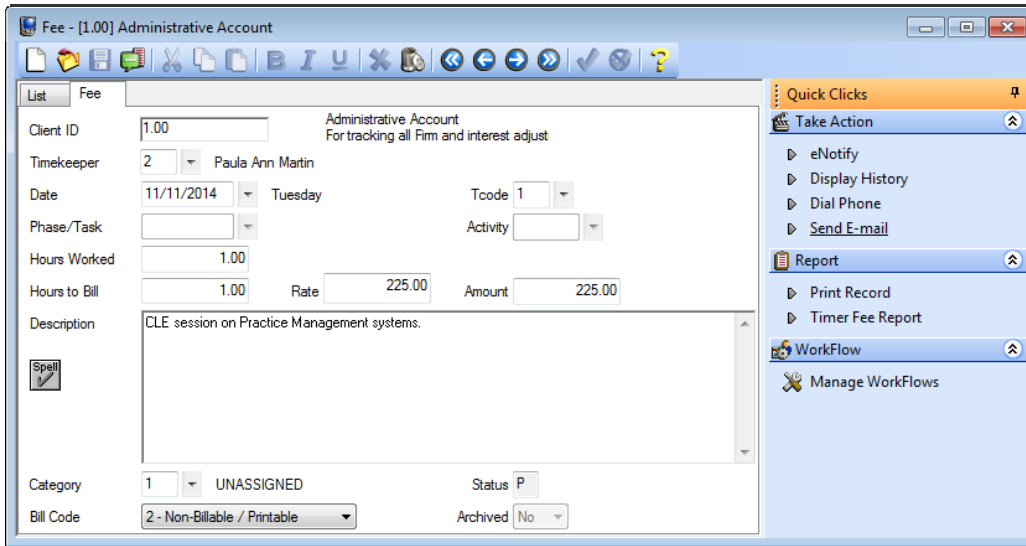


Fig. D-17, Fee Tab in the Fee File

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMCOST
File Description : Cost
File Type : Variable
Fixed Record Size : 294
Number of indexes : 9
Number of fields : 23
Number of records : 94

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Timekeeper	Timekeeper Number	Timekeeper	Y	N	N	N	N	N	2	0	1	999
Date	Date	Date	Y	Y	N	Y	N	N	4	0		
Tcode	Tcode	Tcode	Y	Y	N	N	N	N	2	0	1	999
Phase_Task	Phase/Task	Task Code	Y	N	N	N	N	N	6	0		
Activity	Expense ID	Task Code	Y	N	N	N	N	N	6	0		
Bill_Code	Bill Code	Short	Y	N	N	N	N	N	2	0		
Hold	Status	Character	Y	N	N	N	N	N	1	0		
Amount	Amount	Money	Y	N	N	Y	N	N	8	2		
Description	Description	Memo	Y	N	Y	Y	Y	N	5000	0		
Archived	Archived Transaction	Boolean	Y	N	N	N	N	N	1	0		
Stmt_Date	Statement Date	Date	Y	N	N	N	N	N	4	0		
Stmt_Num	Statement Number	Long	Y	N	N	N	N	N	4	0		
Units	Units	Number	Y	N	N	N	N	N	8	2		
Rate	Rate	Number	Y	N	N	N	N	N	8	3		
Mirror_Seq_No	Mirror Seq No	Long	Y	N	N	N	N	N	4	0		
QBEEditSeq	QB Edit Sequence	Alpha	Y	N	N	N	N	N	39	0		
QBTxnID	QB Trans ID	Alpha	Y	N	N	N	N	N	39	0		
QBVendor	QuickBooks Vendor	Alpha	Y	N	N	N	N	N	41	0		
QBAcct	QuickBooks DB Acct	Alpha	Y	N	N	N	N	N	31	0		
User_ID	User ID	User	Y	N	N	N	N	N	8	0		
Create_Date	Creation Date	Date	Y	N	N	N	N	N	4	0		
Create_Time	Creation Time	Time	Y	N	N	N	N	N	4	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client/Seq	Client/Entry Order	Y	<Client_ID><Entry Order>
2	Arch/Mirror/SeqNo	For Internal Use	Y	<Archived><Mirror_Seq_No><Entry Order>
3	Arch/SeqNo	For Internal Use	Y	<Archived><Entry Order>
4	QBTxnID	QuickBooks TxnID	Y	<QBTxnID>
5	Tcode	For Internal Use	Y	<Tcode>
6	Activity	For Internal Use	Y	<Activity>
7	Client/Arch	For Internal Use	Y	<Client_ID><Archived>
8	Tkpr/Arch/Date/SeqNo	Timekeeper/Archived/Date/Entry Order	Y	<Timekeeper><Archived><Date><Entry Order>
9	Tkpr/Date	Timekeeper/Date	N	<Timekeeper><Date>

CMCOST - Cost File

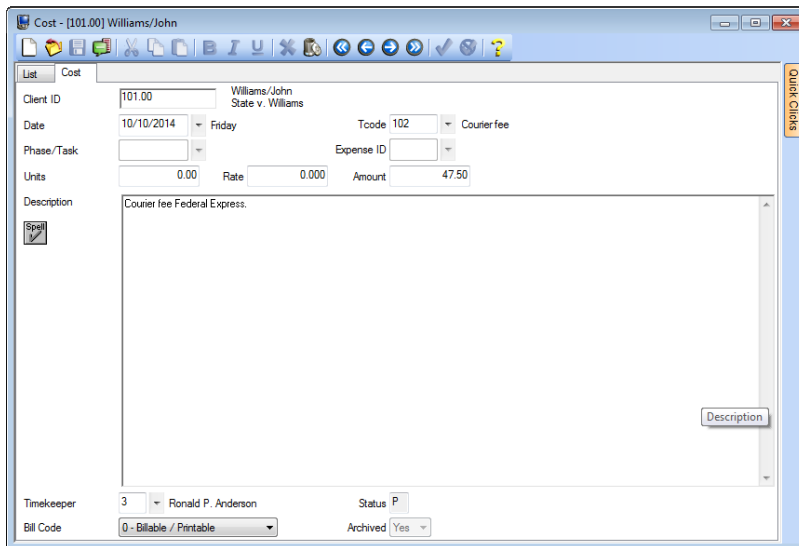


Fig. D-18, Cost Tab in the Cost File

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMCALCOD
File Description : Calendar Code
File Type : Fixed
Fixed Record Size : 291
Number of indexes : 2
Number of fields : 11
Number of records : 53

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Cal_Code	Calendar Code	Calendar Code	Y	Y	N	N	N	N	8	0		
Desc	Description	Alpha	Y	N	Y	N	N	N	128	0		
Type	Type	Alpha	Y	Y	N	N	N	N	1	0		
Txt_Color	Text Color	Long	Y	N	N	N	N	N	4	0		
Bk_Color	Background Color	Long	Y	N	N	N	N	N	4	0		
Priority	Priority	Short	Y	N	N	N	N	N	2	0	0	9
Private	Private	Boolean	Y	N	N	N	N	N	1	0		
AlarmExpr	Alarm	Alpha	Y	N	N	N	N	N	80	0		
Disable_Dnd	Disable Drag and Drop	Boolean	Y	N	N	N	N	N	1	0		
Tcode	Tcode Number	Tcode	Y	N	N	N	N	N	2	0	1	999
Amount	Amount	Money	Y	N	N	N	N	N	8	2		

Index	Index ID	Index Description	Protected	Sort Order
1	Calendar Code	Calendar Code	Y	<Cal_Code>
2	Type	Event/Task	N	<Type><Cal_Code>

CMCALCOD - Calendar Code File

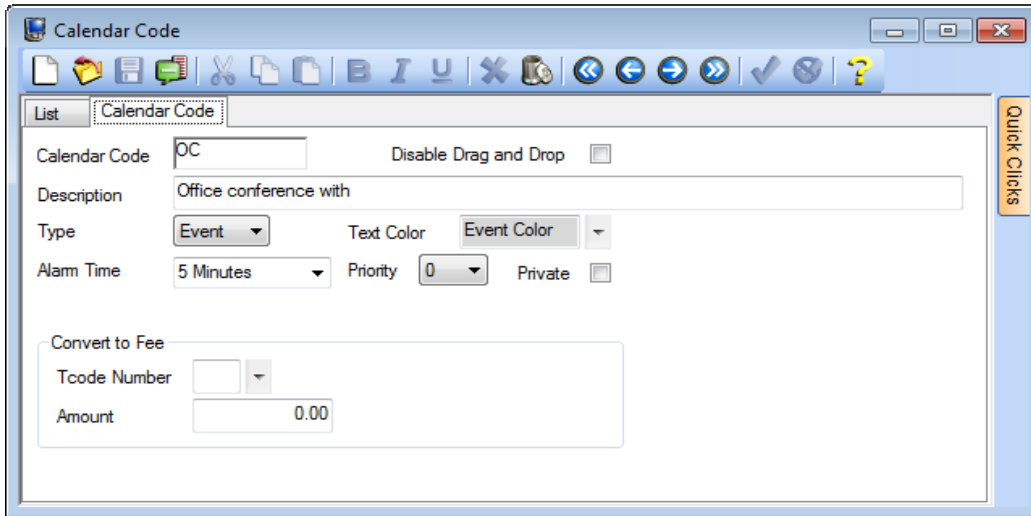


Fig. D-19, **Calendar Code** Tab in the Calendar Code File

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMEMPL
File Description : Timekeeper
File Type : Fixed
Fixed Record Size : 99
Number of indexes : 3
Number of fields : 5
Number of records : 11

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Empl	Tkpr Number	Timekeeper	Y	Y	N	N	N	N	2	0	1	999
Name	Name	Alpha	Y	N	N	N	N	N	35	0		
Initials	Init	Alpha	Y	N	N	N	N	N	3	0		
Inactive	Inactive	Boolean	Y	N	N	N	N	N	1	0		
Rate1	Rate 1	Number	Y	N	N	N	N	N	8	2	0.00	9999.99

Index	Index ID	Index Description	Protected	Sort Order
1	Tmkpr Num	Timekeeper Number	Y	<Empl>
2	Inits/Tmkpr Num	Timekeeper Initials	Y	<Initials><Empl>
3	Name	Name	Y	<Name><Empl>

CMEMPL - Timekeeper File

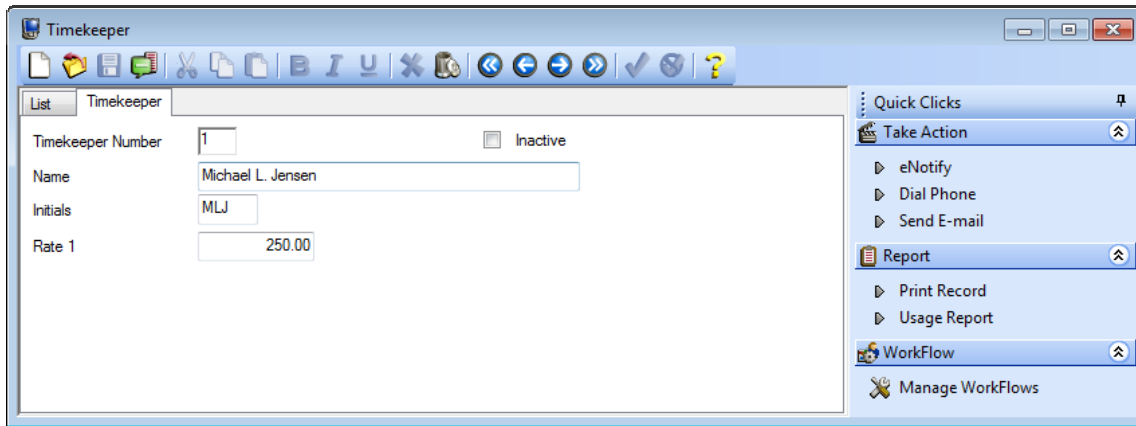


Fig. D-20, **Timekeeper** Tab in the Timekeeper File

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMCAT
File Description : Category
File Type : Fixed
Fixed Record Size : 85
Number of indexes : 2
Number of fields : 3
Number of records : 14

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Category_Number	Category Number	Category	Y	Y	N	N	N	N	2	0	1	999
Description	Desc	Alpha	Y	N	N	N	N	N	30	0		
Code_Set	Task Code Set	Alpha	Y	N	N	N	N	N	3	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Cat Num	Category Number	Y	<Category_Number>
2	Desc	Desc	Y	<Description><Category_Number>

CMCAT - Category

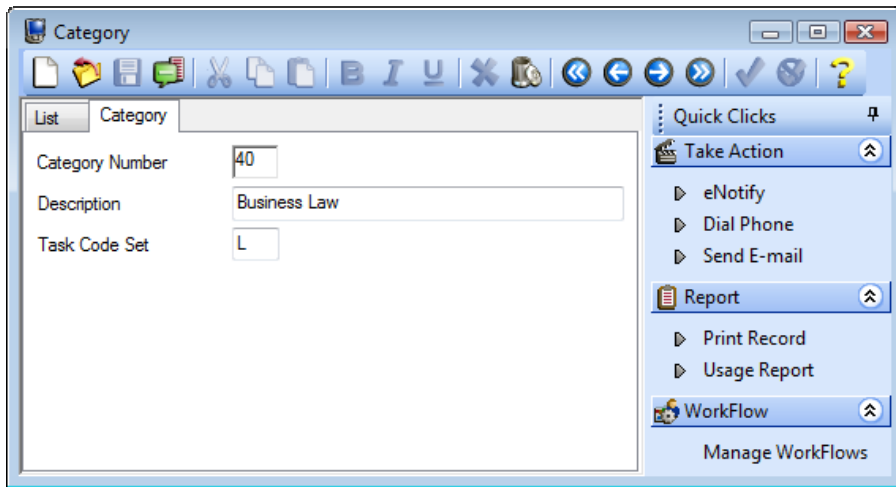


Fig. D-21, Category Tab in the Category File

AOP Name : CMSYSTEM
AOP Description : System Files
 File Name : CMTCODE
 File Description : Transaction Code
 File Type : Variable
 Fixed Record Size : 149
 Number of indexes : 2
 Number of fields : 12
 Number of records : 44

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Tcode	Tcode Number	Tcode	Y	Y	N	N	N	N	2	0	1	999
Alpha_Code	Alpha Code	Alpha	Y	N	N	N	N	N	3	0		
Tcode_Type	Tcode Type	Short	Y	N	N	N	N	N	2	0		
Rate	Rate	Number	Y	N	N	N	N	N	8	3		
Amount	Amount	Money	Y	N	N	N	N	N	8	2		
Exp_Adv_Fee_Type	Exp/Adv/Fee Type	Alpha	Y	N	N	N	N	N	1	0		
Bill_Code	Bill Code	Short	Y	N	N	N	N	N	2	0		
QB_INTEGRATION	Integrate with QuickBooks	Boolean	Y	N	N	N	N	N	1	0		
QB_DB_ACCT	QuickBooks Debit Acct	Alpha	Y	N	N	N	N	N	31	0		
QB_CR_ACCT	QuickBooks Credit Acct	Alpha	Y	N	N	N	N	N	31	0		
Hours	Hours	Number	Y	N	N	Y	N	N	8	2	-999.99	9999.99
Desc	Description	Memo	Y	N	N	N	N	N	5000	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Tcode Num	Tcode Number	Y	<Tcode>
2	Alpha/Tcode Num	Alpha Tcode	Y	<Alpha_Code><Tcode>

CMTCODE - Transaction Code File

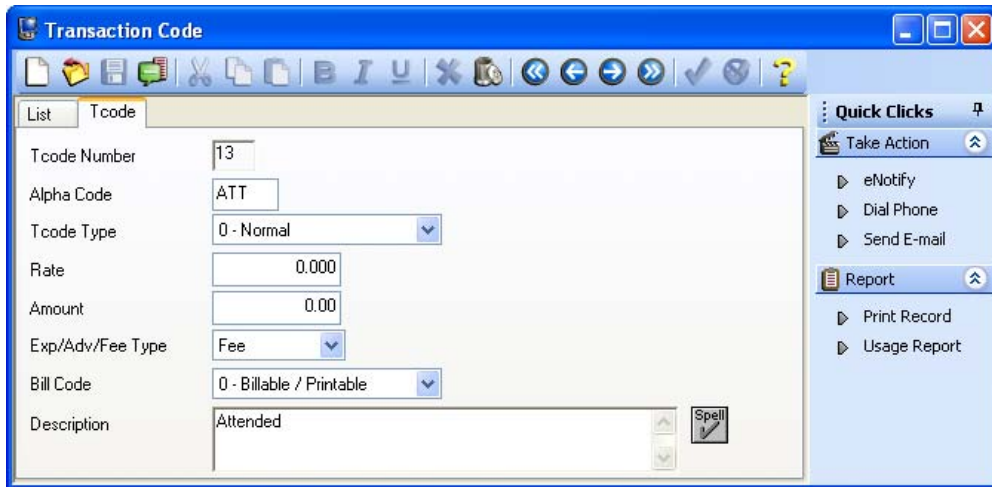


Fig. D-22, Tcode Tab in the Transaction Code File

Date: 11/17/2014 Page: 1

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMTBCODE
File Description : Task Code
File Type : Fixed
Fixed Record Size : 128
Number of indexes : 1
Number of fields : 3
Number of records : 367

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Phase_Activity_ID	Phase Activity Id	Task Code	Y	Y	N	N	N	N	6	0		
Description	Description	Alpha	Y	N	N	N	N	N	70	0		
Tcode_Translation	Tcode	Tcode	Y	N	N	N	N	N	2	0	1	999

Index	Index ID	Index Description	Protected	Sort Order
1	Task ID	Task ID	Y	<Phase_Activity_ID>

CMTBCODE - Task Code File

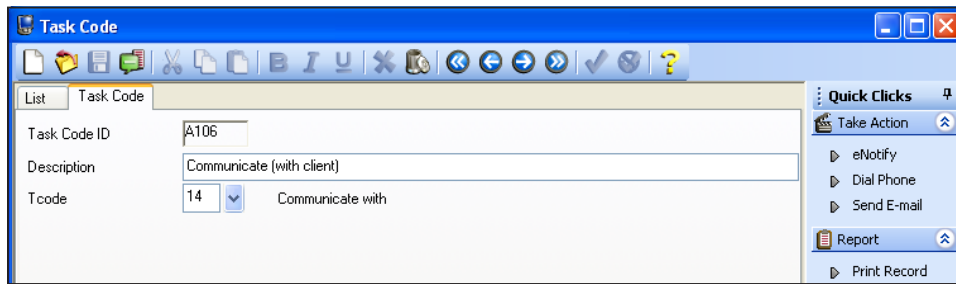


Fig. D-23, **Task Code** Tab in the Task Code File

Date: 11/17/2014 Page: 1

File Definition
Jensen, Martin & Anderson, P.C.

AOP Name : CMSYSTEM
AOP Description : System Files

File Name : CMLOC
File Description : Location
File Type : Fixed
Fixed Record Size : 98
Number of indexes : 1
Number of fields : 2
Number of records : 3

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Location_ID	Location ID	LOCATION	Y	Y	N	N	N	N	8	0		
Description	Description	Alpha	Y	N	N	N	N	N	40	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Location ID	Location ID	Y	<Location_ID>

CMLOC - Location File

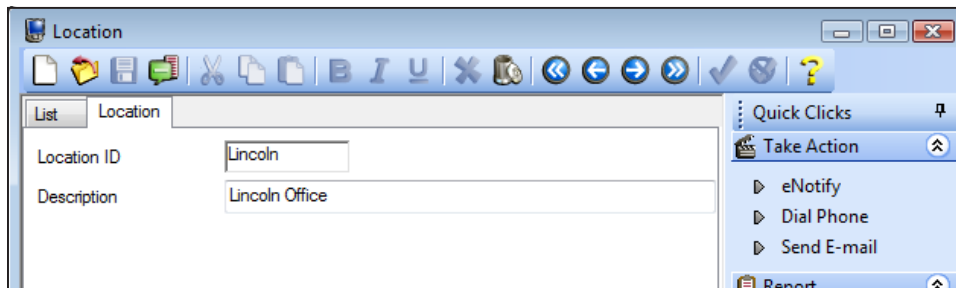


Fig. D-24, **Location** Tab in the Location File

AOP Name : CMSYSTEM
AOP Description : System Files
 File Name : RELCNTCT
 File Description : Related Contacts
 File Type : Variable
 Fixed Record Size : 147
 Number of indexes : 1
 Number of fields : 4
 Number of records : 2

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	13	0		
Contact	Contact	Contact	N	N	N	N	Y	N	54	0		
How_Related	How Related	Alpha	N	N	N	N	+ Y *	N	30	0		
Notes	Notes	Memo	N	N	N	N	Y	N	45000	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client ID	Client/Entry Order	Y	<Client_ID><Entry Order>

RELCNTCT - Related Contacts File

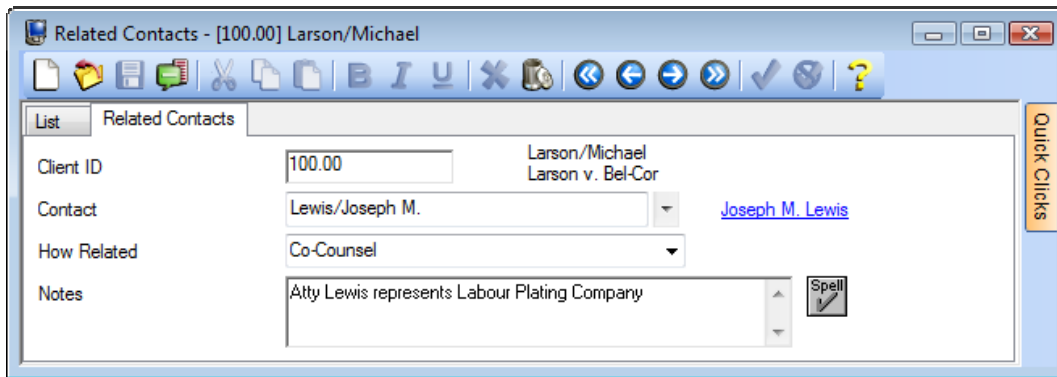


Fig. D-25, **Related Contacts** Tab in the Related Contacts File

AOP Name : CMSYSTEM
AOP Description : SYSTEM Files

File Name : CMENOTE
File Description : eNote
File Type : Variable
Fixed Record Size : 126
Number of indexes : 7
Number of fields : 21
Number of records : 2

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Len	Dec	Min Value	Max Value
Urgent	Urgent	Boolean	Y	N	N	N	N	N	1	0		
Status	Status	Long	Y	N	N	N	N	N	4	0		
Read	Read	Boolean	Y	N	N	N	N	N	1	0		
Deleted	Deleted	Boolean	Y	N	N	N	N	N	1	0		
Forwarded	Forwarded	Boolean	Y	N	N	N	N	N	1	0		
Replied	Replied	Boolean	Y	N	N	N	N	N	1	0		
Link_SeqNo	Link SeqNo	Long	Y	N	N	N	N	N	4	0		
Link_Aop	Link Aop	Alpha	Y	N	N	N	N	N	8	0		
Link_File	Link File	Alpha	Y	N	N	N	N	N	8	0		
Journal_SeqNo	Journal SeqNo	Long	Y	N	N	N	N	N	4	0		
Cal_SeqNo	Cal SeqNo	Long	Y	N	N	N	N	N	4	0		
Fee_SeqNo	Fee SeqNo	Long	Y	N	N	N	N	N	4	0		
Date	Date	Date	Y	Y	N	N	N	N	4	0		
Time	Time	Time	Y	Y	N	N	N	N	4	0		
From	From	User	Y	Y	N	N	N	N	8	0		
To_List	To	Memo	Y	Y	N	N	N	N	45000	0		
Message	Message	Memo	Y	N	N	N	N	N	45000	0		
Direction	Direction	Character	Y	Y	N	N	N	N	1	0		
Owner	Owner	User	Y	Y	N	N	N	N	8	0		
Message_ID	Message ID	Long	Y	Y	N	N	N	N	4	0	1	
Source_ID	Source ID	Long	Y	N	N	N	N	N	4	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Admin: Owner	Owner/Entry Order	Y	<Owner><Entry Order>
2	Owner_Read_Direction	Owner / Read / Direction / ID	Y	<Owner><Read><Direction><Message_ID><Entry Order>
3	Message_ID	ID / Owner / Direction	Y	<Message_ID><Owner><Direction>
4	Owner/Entry Order	Owner/Deleted/Entry Order	Y	<Owner><Deleted><Entry Order>
5	Owner/Direction	Owner/Deleted/Direction	Y	<Owner><Deleted><Direction><Entry Order>
6	Owner/Read	Owner/Deleted/Direction/Read	Y	<Owner><Deleted><Direction><Read><Entry Order>
7	Admin: Deleted	Deleted/Entry Order	Y	<Deleted><Entry Order>

CMENOTE - eNote File

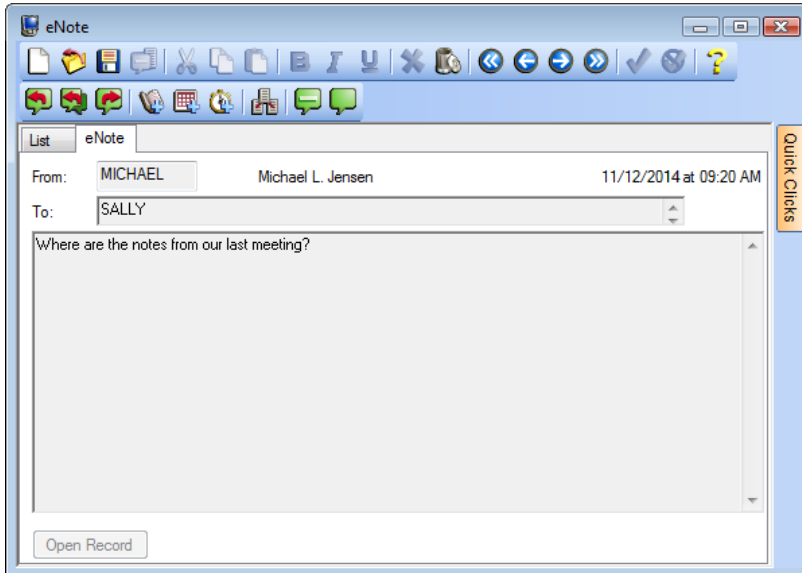


Fig. D-26, eNote Tab of the eNote File

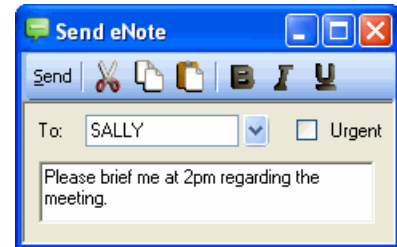


Fig. D-27, Send eNote Window