

Webinar Outline

Global Reports

This button can be found in the Global Toolbar. It is a list of canned reports that pull together information from all modules in one report based on search criteria.

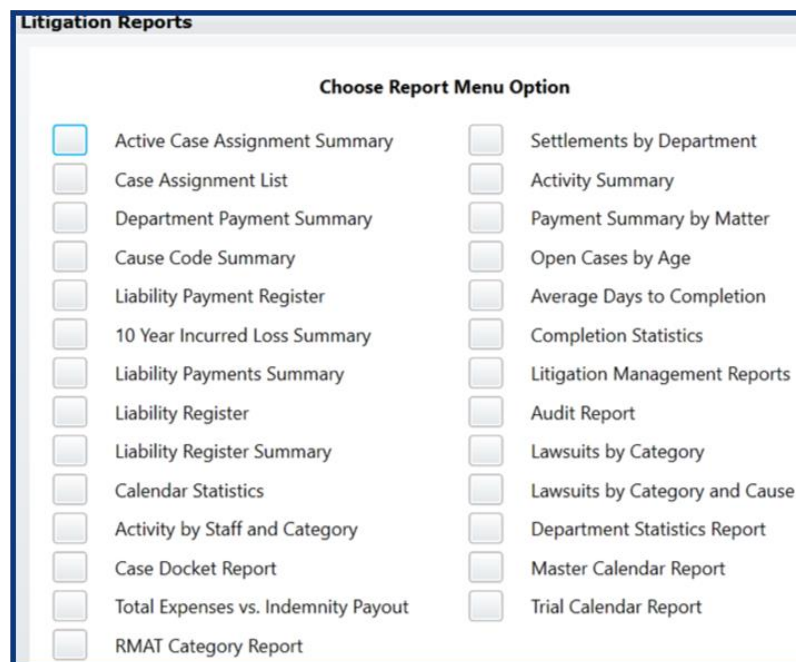


Global Report Menu

- ☐ Payment Register and Export
- ☐ Payment by Object Code-Summary
- ☐ Attorney Payment by Object Code-Summary
- ☐ Staff Case List

Module Reports

Can be found at the bottom of the Litigation module (and all other modules) immediately to the right of the Print button. List of canned reports that pull information from the selected module only. Each module has its own selection of reports.



Litigation Reports

Choose Report Menu Option

☐ Active Case Assignment Summary	☐ Settlements by Department
☐ Case Assignment List	☐ Activity Summary
☐ Department Payment Summary	☐ Payment Summary by Matter
☐ Cause Code Summary	☐ Open Cases by Age
☐ Liability Payment Register	☐ Average Days to Completion
☐ 10 Year Incurred Loss Summary	☐ Completion Statistics
☐ Liability Payments Summary	☐ Litigation Management Reports
☐ Liability Register	☐ Audit Report
☐ Liability Register Summary	☐ Lawsuits by Category
☐ Calendar Statistics	☐ Lawsuits by Category and Cause
☐ Activity by Staff and Category	☐ Department Statistics Report
☐ Case Docket Report	☐ Master Calendar Report
☐ Total Expenses vs. Indemnity Payout	☐ Trial Calendar Report
☐ RMAT Category Report	

Search and Print

Using the “Search” button at the bottom of each module, enter search criteria that provides a Search Results list. Use the “PRINT” button to choose a report that fits your needs from a simple one line report to a custom list report that produces customized reports.

Time Accounting Reports

There are two reporting buttons in the Global Toolbar that provide Time Accounting Reports.

- Time Accounting (Gold Watch) – Various canned reports providing time entry information based on search criteria;
- General Staff Reports – Two ways to report on personal time entries.

Global File Search Buttons

Show My Open Files and Global Matter Search provides a “Print” button that produces a one-line report.

Calendar Reports

Print buttons available that will produce a report from search results list of calendar searches.

Excel Spreadsheet/PDF

All reports can be saved in PDF format or exported to an Excel Spreadsheet.