THE SMART WAY TO RUN YOUR SMALL PRACTICE

SILQ Solicitor Learner Guides

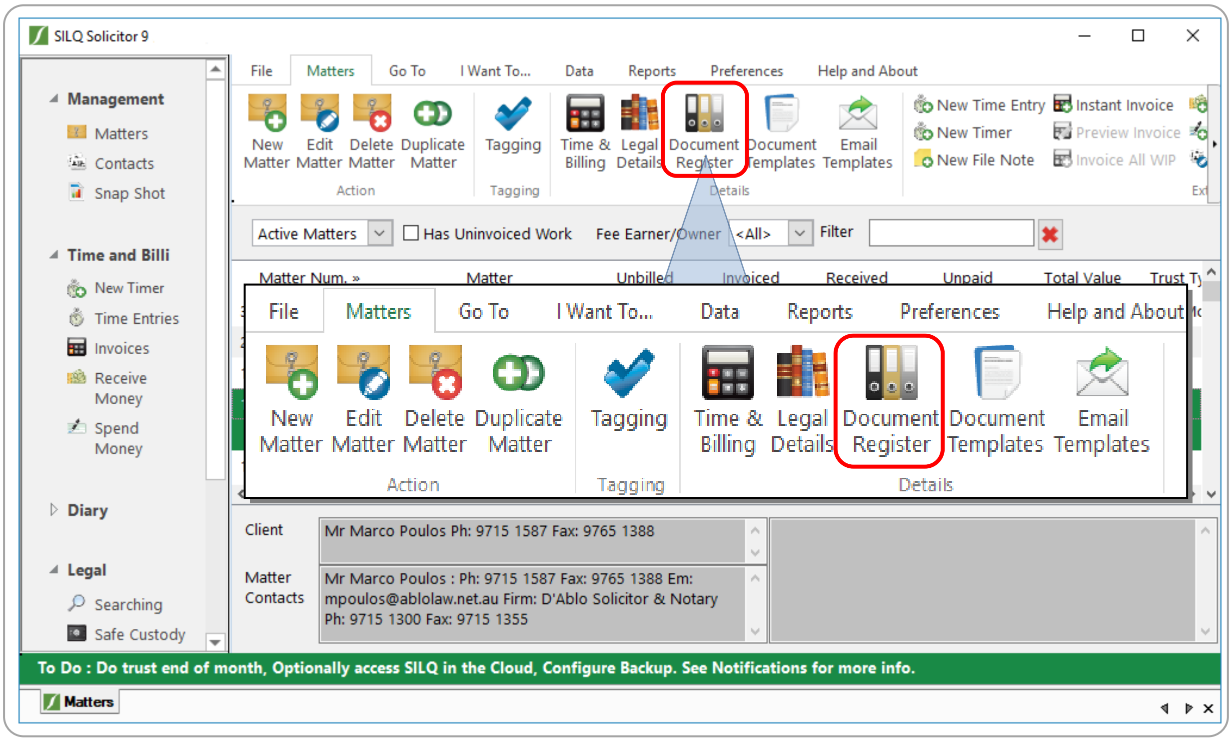
Manual 7 – Document Register, Document Templates and Court Forms

Table of Contents

1. Document Register

Overview

- The Document Register allows you to manage all aspects of documents associated with a matter. SILQ allows you to capture documents that have been sent to you, help you edit them and then send them on to the required person as needed.
- You can track documents that are related to a matter, including emails, documents and other types of files. This allows you to keep control of these documents, file them with keywords, authors etc for a more detailed understanding of the documents. You can also track if the document is a draft or complete. These fields can all be searched and filtered. Additionally SILQ can quickly open the file regardless of where it is stored.

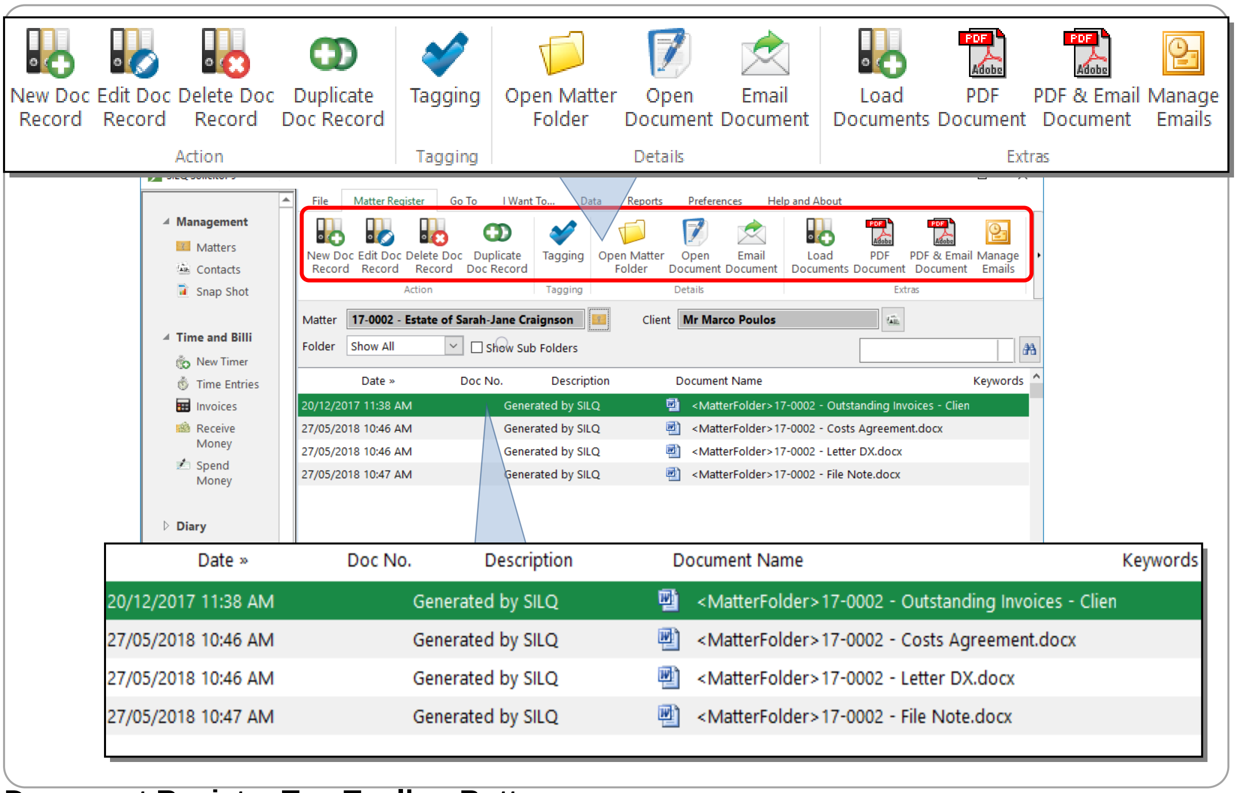


When you generate any document in SILQ for a particular matter, such as an invoice or receipt, it will record it in the Document Register. The Document Register is an area where all documents associated to a matter can be linked to, which makes it easy to find and view all the documents that have been associated to a matter.

1.1 Using the Document Register Window

If you are not on the matters window, click on the **Matters** button on the left Navigation Toolbar. This will bring you to the Matters window. To access the Document Register, from the Matters window click on a matter and then click on the Document Register button on the Top Toolbar.

1.2 Right Hand Side and Top Buttons

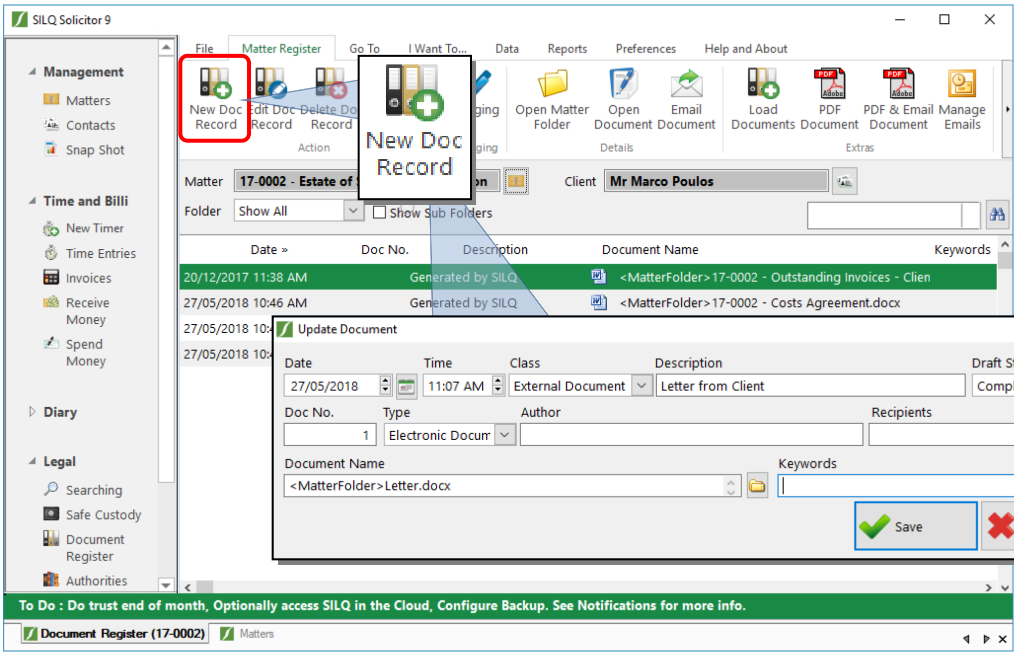


Document Register Top Toolbar Buttons

Refer to the screen shot above:

- **New Doc Record:** This allows you to create a new document for a specific matter. It will prompt you to select a matter if necessary.
- **Edit Doc Record:** This allows you to make changes to the selected document entry. (Not the document itself)
- **Delete Doc Record:** This allows you to delete the selected document entry. (Not the document itself)
- **Open Document:** This will open the file immediately in the program that the file type is associated with. For example, Word, Excel, PDF etc docs will be opened in their correct program.
- **Email Document:** Having done what you need to with a document, it is an easy process to then email a document (or multiple using tagging) to anyone using the Email Document button. This will show the documents window where you can select an email to generate and it will attach the currently selected document to the email. If using Tagging then it will attach all the tagged documents.
- **Manage Emails**: This will open the Manage Emails window where you can save emails or attachments from your inbox into the document register.
- **Open Matter Folder**: This will take you directly to the folder on your hard drive or server where the documents that are listed in the document register are located.

1.3 Editing or Creating New Documents on the Register



As well as automatically adding generated documents to the register, you can manually add an external document or email to the register for a particular matter.

First you need to save the document, email etc, into the client folder on your hard drive or server. To locate that folder, just click on the **Open Matter Folder** button at the top of the Document Register window. SILQ will automatically open up the client folder on your hard drive or server where you can save the document, email etc.

Next, click on the **New Doc Record** button on the top toolbar. The Update Document window will open ready for you to enter the details of the external document or email. In the example above, an external letter document has been added to the document register. Refer to the next page for an explanation of all the fields.

Fields:

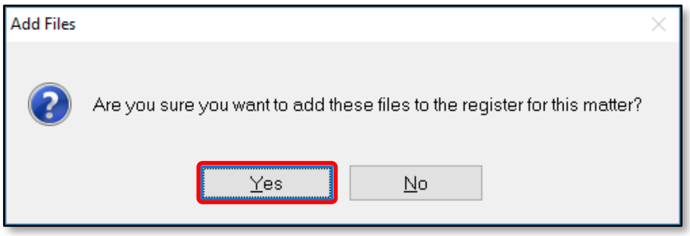
- **Date:** This is the date the document was created
- **Time:** This is the time the document was created
- **Class:** The class indicates how the document was produced. Eg A Generated Document was generated by SILQ, an External Document was created some other way.
- **Description:** This is a description of the document
- **Draft Status:** Is the document still a draft or is it complete
- **Doc No:** If you want to have document tracking numbers you can enter them here
- **Type:** This indicates what type of document it is. Eg is it a web page or is it a document
- **Author:** Who authored the document
- **Recipients:** Who the document was sent to
- **Document Name:** This is the file name of the document. This is the file that will be opened when you click on the Open Document button.
- **Keywords:** This allows you to enter searchable keywords so that you can find the document more easily later on.

1.4 Drag and Drop

One of the more powerful features of the document register is that you can drag and drop files from Windows Explorer directly on to the document register window. This will create an entry for each of them. You can then enter details about the document such as author, keywords, description etc, after the document has been added to the register.

First you need to save the document, email etc, into the client folder on your hard drive or server, before you drag and drop it into the document register. Then drag and drop the document from the folder to the document register window. When you do this the following message will appear confirming that you would like to add this document to the register.

Click the **Yes** button to add the document to the register.



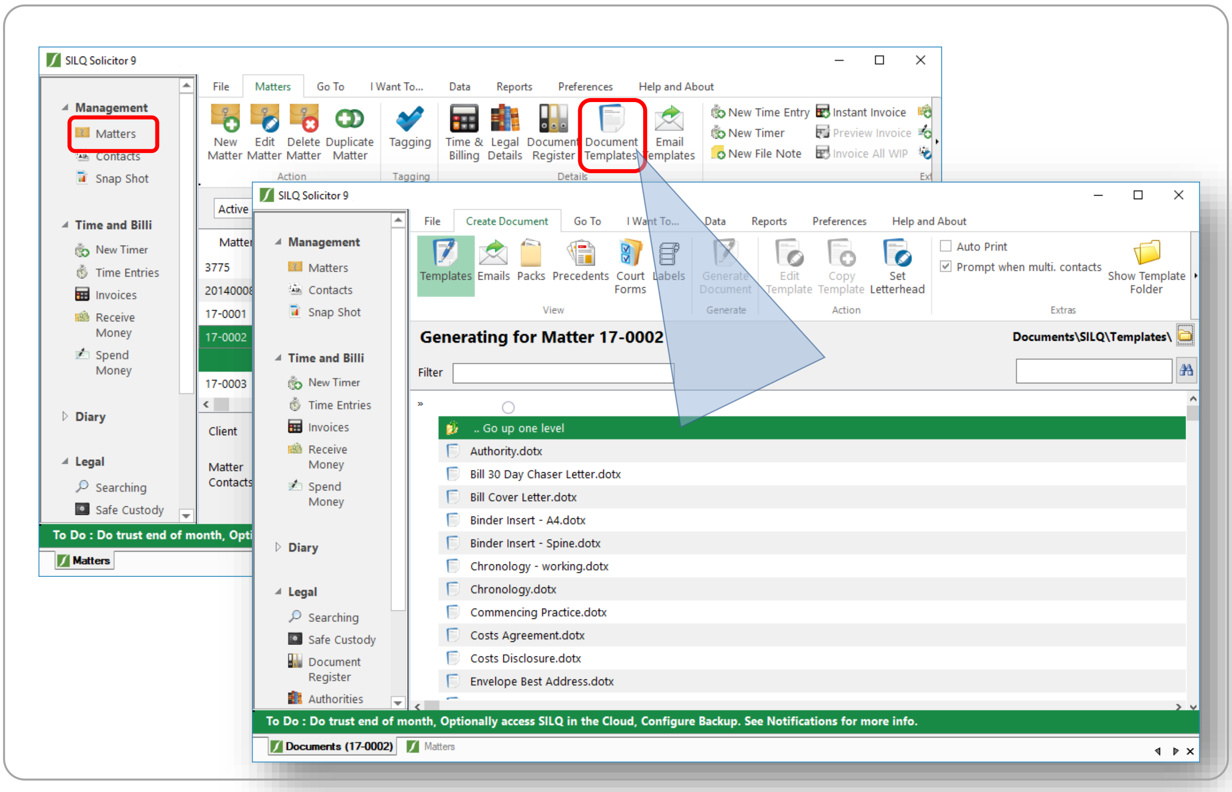
Generated documents will automatically have an entry in the document register if Document **Saving and Tracking** is turned on in System Settings.

NB: Multiple documents can also be loaded in by clicking on the Load Documents button in the top toolbar.

2. Template Editing

Overview
• SILQ gives you the ultimate flexibility to create and manage your own templates within such functions as emails, documents, invoices, labels and even document packs. You have complete control over things like Font, Size of Text, Logos and Colours etc as well as having access to information from your database. • The great thing about the way SILQ is configured is that all the basic templates are already created for your use. In this section, we'll learn how to modify existing templates to create them for your practice.

2.1 Template Location



To access the templates you need to be on the matters window, if you are not on this window, click on the **Matters** button on the left side Navigation Toolbar.

To access the templates click on the **Document Templates** button in the top toolbar. The Documents window will open up, and all the main document templates will be listed in the centre of the window.

2.2 Six Types of Templates

There are six types of templates. These include, Document Templates, Emails, Document Packs, Precedents, Court forms and Labels.

Document Templates:

These templates form the basis of all the documents that you can generate out of SILQ. They are Word templates and they can be opened in any version of Word and edited like an ordinary word document. The templates in SILQ allow you to create documents quickly at the click of a button. They also support Open Office.

For example: You can generate an invoice instantly and SILQ will pull in the clients name, address and amount because this data is already entered into your SILQ database. Your invoice will then open up in word ready to be printed. All document templates are editable and you can create your own as well. Eg. Putting in your own letterhead and change formatting etc.

Email Templates:

These are similar to document templates, but instead of creating a document it will create an email. It will fill in such things as the contact's email address, the matter name, as well as being able to have content already prepared for the email, such as a bill cover email.

Document Packs:

Document packs are very powerful. Often when you are doing something like generating an invoice, you don't want just one document to be generated, you want a few. In the case of an invoice you may want not only the invoice, but a cover letter and an envelope.

A document pack allows you to define a group of document or email templates to generate all at once. Refer to page 35 to see a more in depth explanation of document packs.

Court Forms:

Refer to 8. Court Forms and Precedents to see how to use court forms.

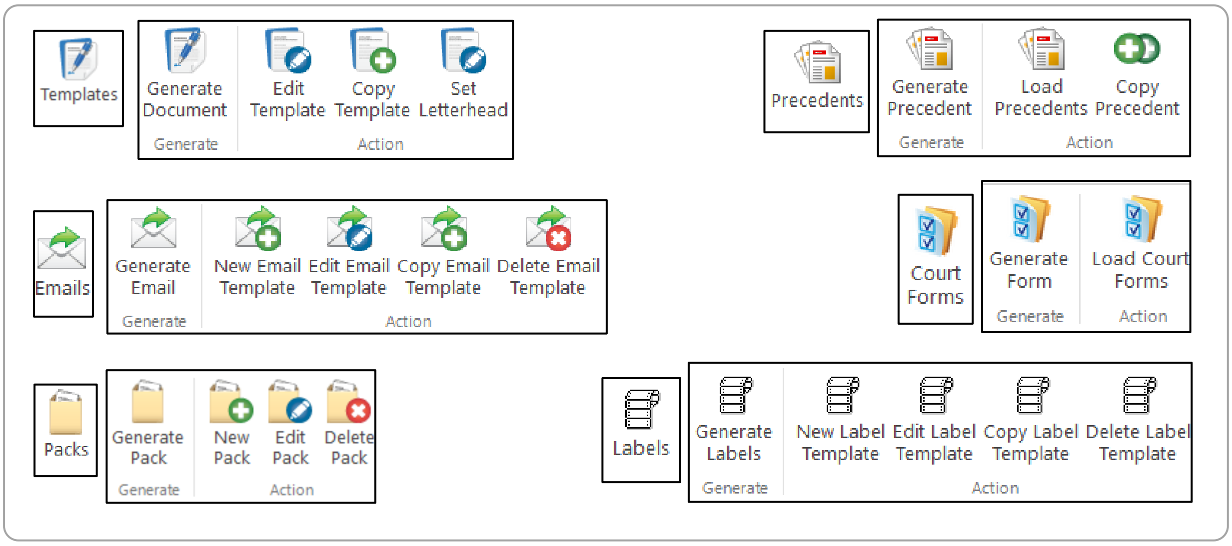
Precedents:

Our library of legal precedents which cover most areas of law. *(Subscription Required)*

Label Templates:

The label system allows you to print out sheet labels (Eg Avery labels) with any number of labels. It uses the same template system as the document and email templates, allowing you to have full control over what it generated. All label templates are editable and you can create your own as well.

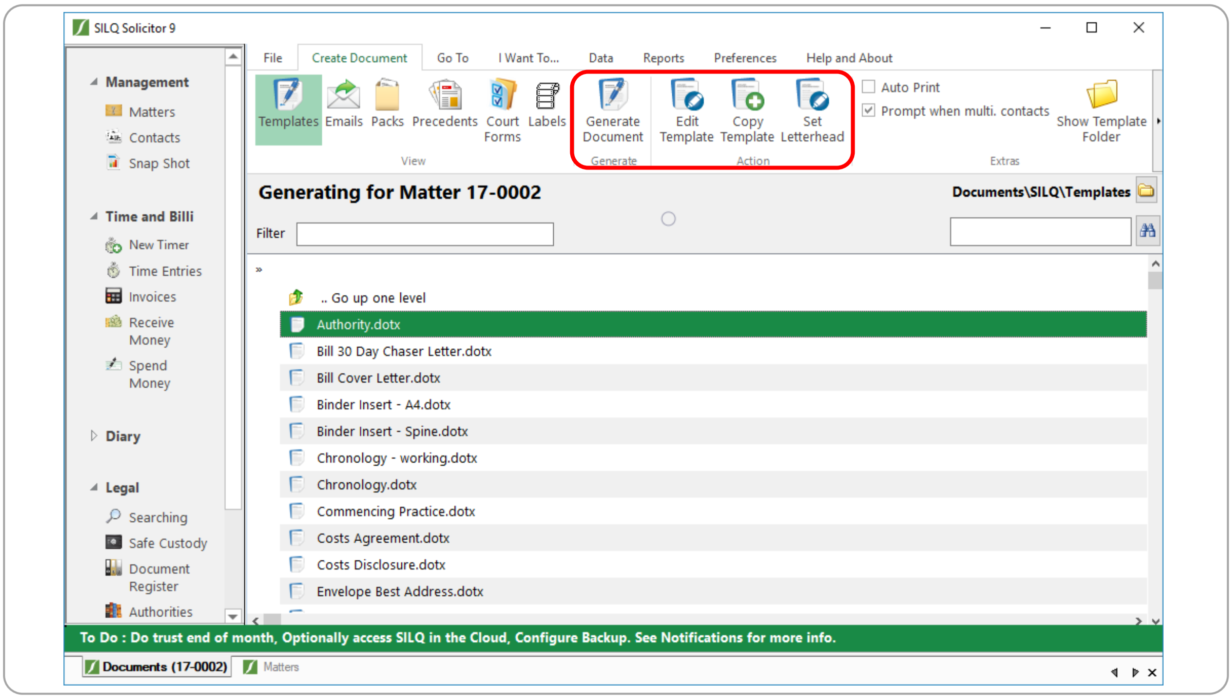
When you generate a label sheet, you are prompted to select the label type that you want to generate. Refer to page 39 to see a more in depth explanation of label templates.



Each type of template has its own set of buttons within the Documents window. As you click on different template type tabs, the buttons on the Top Toolbar will change to show you the relevant buttons for that type of template.

The screen shot above shows each template types top toolbar.

2.3 Document Templates



Document templates are the most common templates that you would edit in the Documents window. All templates are Microsoft Word template files which are indicated by the extension.dotx. So they can all be opened in Microsoft Word and edited like a standard document.

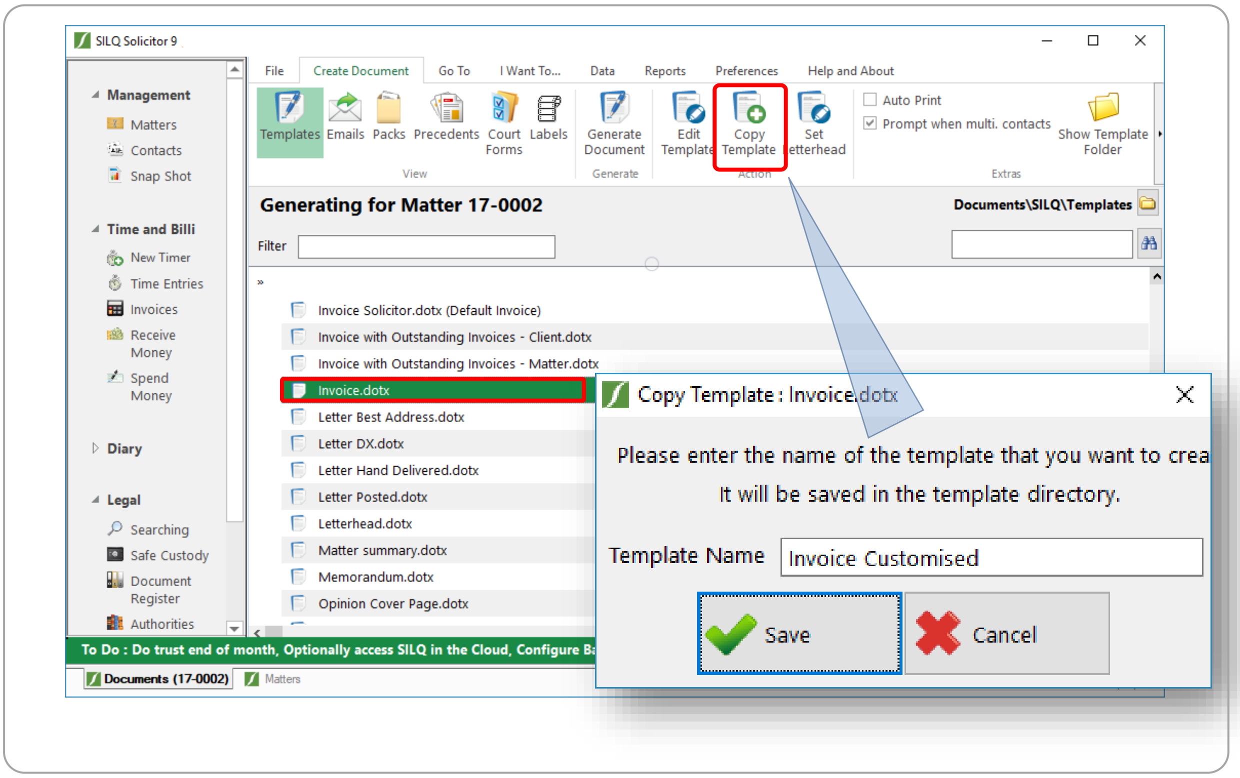
Let's look at the top toolbar buttons specifically for Document Templates.

Generate Document: This will generate a Word document using the currently selected template, merging the data from selected record in the window that you were on when you clicked on the Documents button. It is important to note that certain templates can only be generated in the correct 'Context', meaning for example that an invoice template can only be generated from the Invoices window. If you tried to generate it from the matter window, a message will appear saying that it needs to be generated form the Invoices window. When you proceed the invoice will open with no data in it as it has been generated from the incorrect window.

Edit Template: This opens the template editor to make changes to selected template

Copy Template: This allows you to create a new template, using the selected template as the starting point. As such when you are creating a new template it is recommended that you copy a template that is similar to what you want as that will bring over all the template codes from that template.

2.4 Creating a template from the Copy Template button



The easiest way to create a customised template is by finding a similar template and then modifying it. This functionality is put in here specifically to make it easier for you to create templates from existing ones, rather than having to start from scratch.

In the example above, we will be customising the standard Invoice template so it includes the matter name.

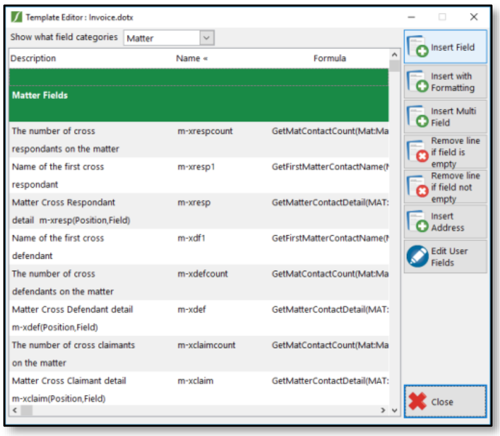
Once you are in the Documents window, locate the **invoice.dotx** template from the Document Templates list.

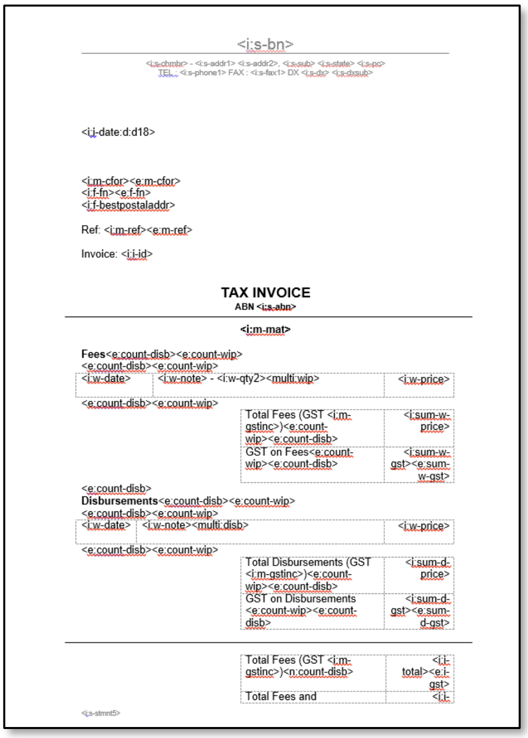
Click once to highlight the template and then click on the **Copy Template** button. You will be prompted by SILQ to create the new Template name. In this case, we will call it ‘**Invoice Customised’**.

Next click on the **Save** button.

SILQ will now present you with two things:

It will open up the Template Editor window in SILQ, like the one in the example below, and it will open up the Template in Word that you are going to customise. In this case it is the 'Invoice Customised' template.





2.5 The Template Editor

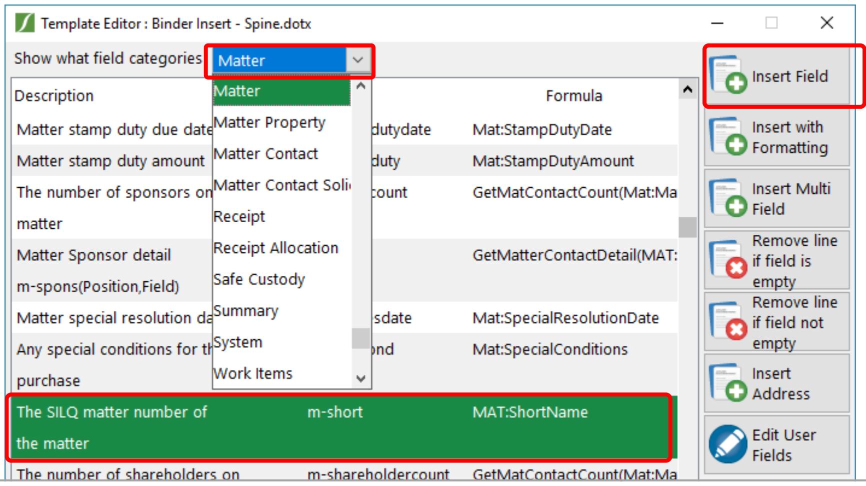
The Template Editor is the behind the scenes functionality that creates all the standard things that appear on your documents. In the example Invoice Customised template above, you will see a lot of codes throughout the document. The template editor is where you obtain these codes. The codes are then inserted into the template and when this document is generated, SILQ pulls in the information into the template from the information entered in SILQ.

In the Template Editor window the description of the field and the associated code of the field appear in the Template Editor window.

2.6 Adding a field to a Template

In our example we are going to add a field into the invoice template so it includes the matter name. There are 2 ways to add fields to templates. First we will look at adding fields via the Template Editor, and then we will look at how you can find field codes in various edit windows in SILQ without using the template editor.
Tip: Pressing *Control + F* will open up the search window. If you don't find want you're looking for pressing *F3* on your keyboard will go to the next match.

1. Adding field codes via the Template Editor



Once you have copied and opened up the invoice template, in order to insert the code which will display the matter name, put your cursor in the Word document where you want the matter name to appear. Then follow the steps below:

Step 1: In the Template editor, there are many groups in the field categories drop down menu at the top of the Template Editor. Such as Matter, Invoice, Chronology etc. You need to select the relevant category so the correct field codes are displayed.

Step 2: We are going to add the code, which will display the matter number. So in the template editor select the **Matter** category from the drop down menu, and then look down the list for the correct code to insert into the new template. In this case, it's the **short name/matter number of the matter** and the code is **m-short.** If there are a lot of codes to sift through, you can search the template editor by holding down the Ctrl + F key which will bring up a search dialogue box. Then you can type in the name of the field that you are looking for.

Step 3: To insert this code into your template, click on the code, and then click on the **Insert Field** button in the Template Editor, and depending where your cursor was placed in the template, that is where this code will be placed. If it is in the incorrect place in the document, just cut and paste the code where you want it to appear. You can also type the words: **Matter:** to the left of the inserted field, so what will appear on the invoice template is: **Matter: <i:m-short>.** Then when the document is generated out of SILQ what will appear as an example is **Matter: Estate of Parker.** 'Estate of Parker' being the matter name.

Step 4: Save your template document by clicking on the save icon on the top left hand side of your screen. Then close it.

Step 5: Click on the **Close** button in the Template Editor. You will get the following message when closing the template editor, **'Do you want to save changes to the template'**. Just click on **'No'**.

How your new template will look

<i:s-bn>

<i:s-chmbr> - <i:s-addr1> <i:s-addr2>, <i:s-sub> <i:s-state> <i:s-pc>
TEL.: <i:s-phone1> FAX : <i:s-fax1> DX <i:s-dx> <i:s-dxsub>

<i:i-date:d:d18>

<i:m-cfor><e:m-cfor>
<i:f-fn><e:f-fn>
<i:f-bestpostaladdr>

Ref: <i:m-ref><e:m-ref>

Matter: <i:m-short>

Invoice: <i:i-id>

TAX INVOICE
ABN <i:s-abn>

<i:m-mat>

Fees<e:count-disb><e:count-wip>
<e:count-disb><e:count-wip>

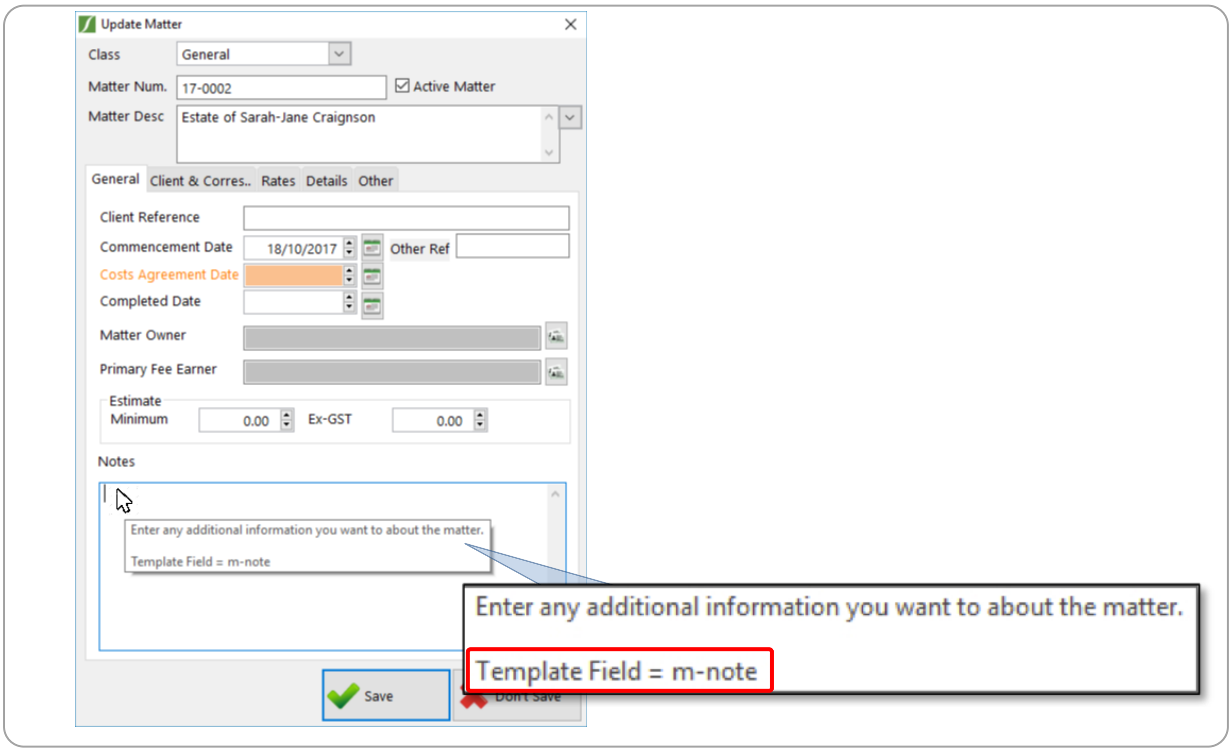
<i:w-date>	<i:w-note> - <i:w-qty2><multi:wip>	<i:w-price>

<e:count-disb><e:count-wip>

Total Fees (GST <i:m-gstinc>)<e:count-wip><e:count-disb>	<i:sum-w-price>
GST on Fees<e:count-wip><e:count-disb>	<i:sum-w-gst><e:sum-w-gst>

<e:count-disb>
Disbursements<e:count-disb><e:count-wip>
<e:count-disb><e:count-wip>

2. How to find field codes via various edit windows in SILQ



There is another option to finding field codes rather than using the template editor, and that is through pop up tips on edit windows in SILQ such as the Update Matter Window.

Instead of searching for a field code in the template editor, simply hovering your mouse over a filed in any edit window will provide you with the relevant field code.

In the example above, the Update Matter window is open, and hovering over the **Notes** field brings up the pop up tip for that field explaining what the notes field is for. At the bottom of the tooltip is the field code.

So if you want to insert your notes into a template you just need to manually type is <i:m-note> into the template where you want the note to appear. The '**i:**' means insert.

3. Advanced Template Editor Functions

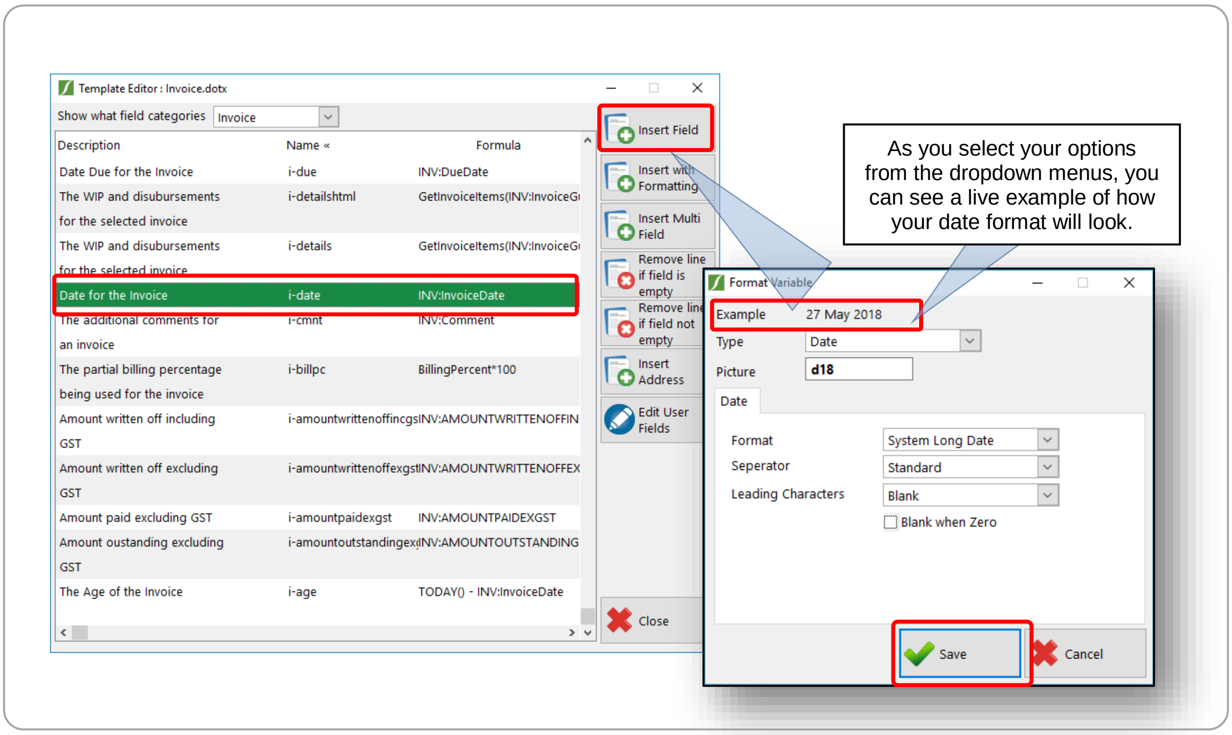
3.1 Formatted Fields

The SILQ Template editor enables you to insert field codes into your templates with certain formatting. These field codes include Date, Time and number field codes.

A good example of this is inserting a date into a template. The template editor allows you to insert a date code into a template with specific formatting to suit your preferences.

For example, the template editor allows you to set specific formatting for the date you want to insert in your template. For example; 10/07/2014 , 10 July 2014, 10072014 etc.

You can also specifiy how you want the date separated. For example; 10/07/2014, 10.07.2014, 10-07-2014 etc.



To insert a field code with formatting, follow the steps below. We will be looking at how to insert a date formatted field code:

Step 1: First select a template you would like to insert a date into from the Documents window and then click on the **Edit Template** button. The template will open up in word and the Template Editor will open up in SILQ. In our example we will be using the standard invoice.dotx template.

Step 2: In the template click to place the cursor where you would like the date to be inserted.

Step 3: In the Template Editor in SILQ, locate a date code by searching for it. In our example we will be inserting the invoice date into the invoice. To insert this code with formatting into your template, click on the code, and then click on the **Insert with Formatting** button. The **Format Variable** dialogue box will open up.

Step 4: Ensure the Type drop down menu has **Date** selected. From the format drop down menu choose the date format you prefer. In the example above, the **Windows Long Date** has been selected. Choose a Separator from the drop down menu and also select if you would like any leading characters in your date format.

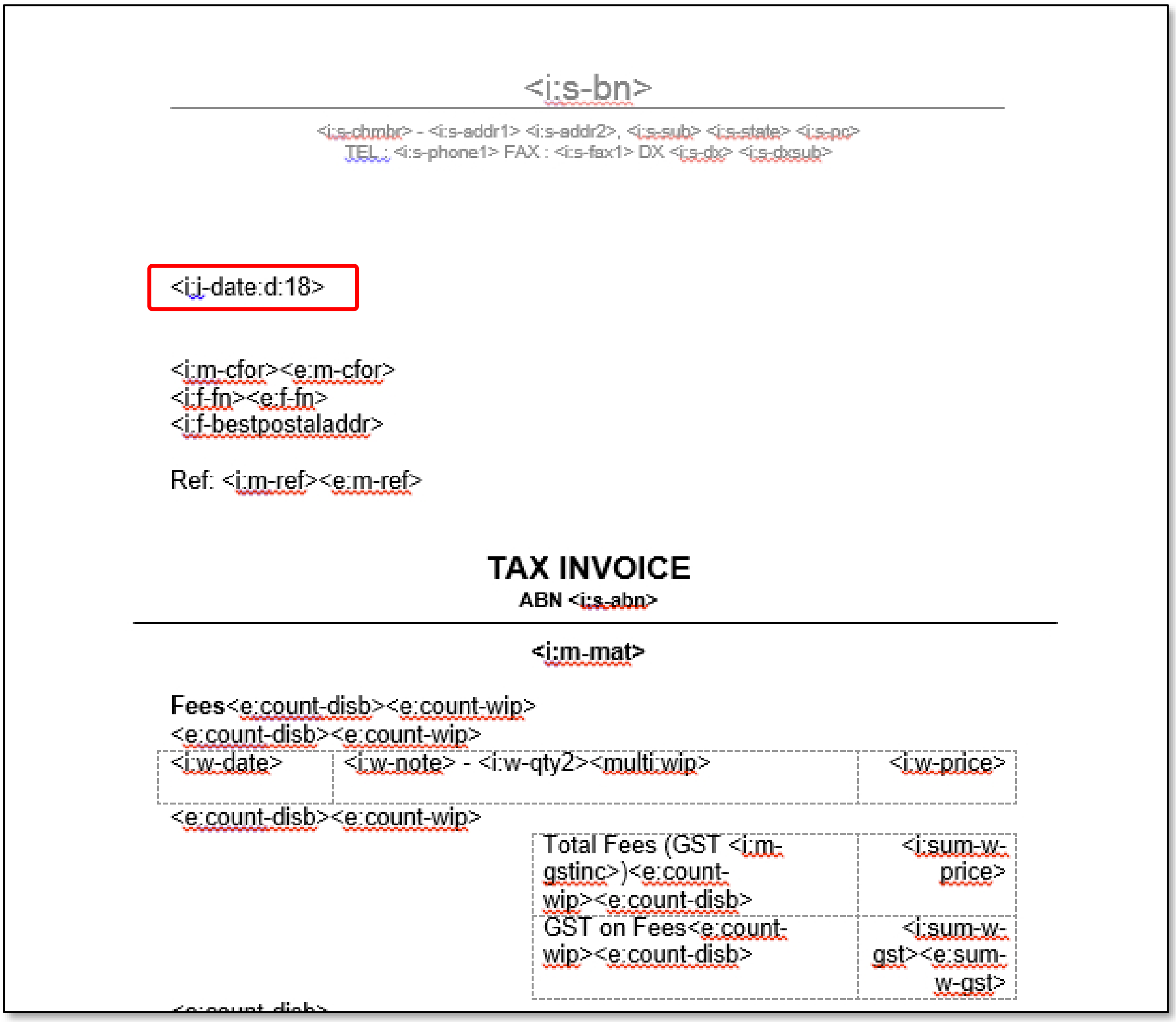
As you select options from these drop down menus, there is an example of how the date will look in your document at the top of the format variable window which dynamically changes as you select various options.

Step 5: Once you have selected all your options and you are ready to insert the formatted field into your template, click on the **Save** button. The Format Variable dialogue box will close down and the formatted code will be inserted into your document.

Step 6: Save your template document by clicking on the save icon on the top left hand side of your screen. Then close it.

Step 7: Click on the **Close** button in the Template Editor. You will get the following message when closing the template editor, **'Do you want to save changes to the template'**. Just click on **'No'**.

How your new template will look with the inserted formatted date code


<i:s-bn>

<i:s-chmbr> - <i:s-addr1> <i:s-addr2>, <i:s-sub> <i:s-state> <i:s-pc>
TEL.: <i:s-phone1> FAX : <i:s-fax1> DX <i:s-dx> <i:s-dxsub>

<i:j-date:d:18>

<i:m-cfor><e:m-cfor>
<i:f-fn><e:f-fn>
<i:f-bestpostaladdr>

Ref: <i:m-ref><e:m-ref>

TAX INVOICE
ABN <i:s-abn>

<i:m-mat>

Fees<e:count-disb><e:count-wip>
<e:count-disb><e:count-wip>

<i:w-date>	<i:w-note> - <i:w-qty2><multi:wip>	<i:w-price>

<e:count-disb><e:count-wip>

Total Fees (GST <i:m-gstinc>)<e:count-wip><e:count-disb>	<i:sum-w-price>
GST on Fees<e:count-wip><e:count-disb>	<i:sum-w-gst><e:sum-w-gst>

<e:count-disb>

3.2 User Defined Fields

The SILQ Template editor allows you to create your own customised field codes to insert into templates.

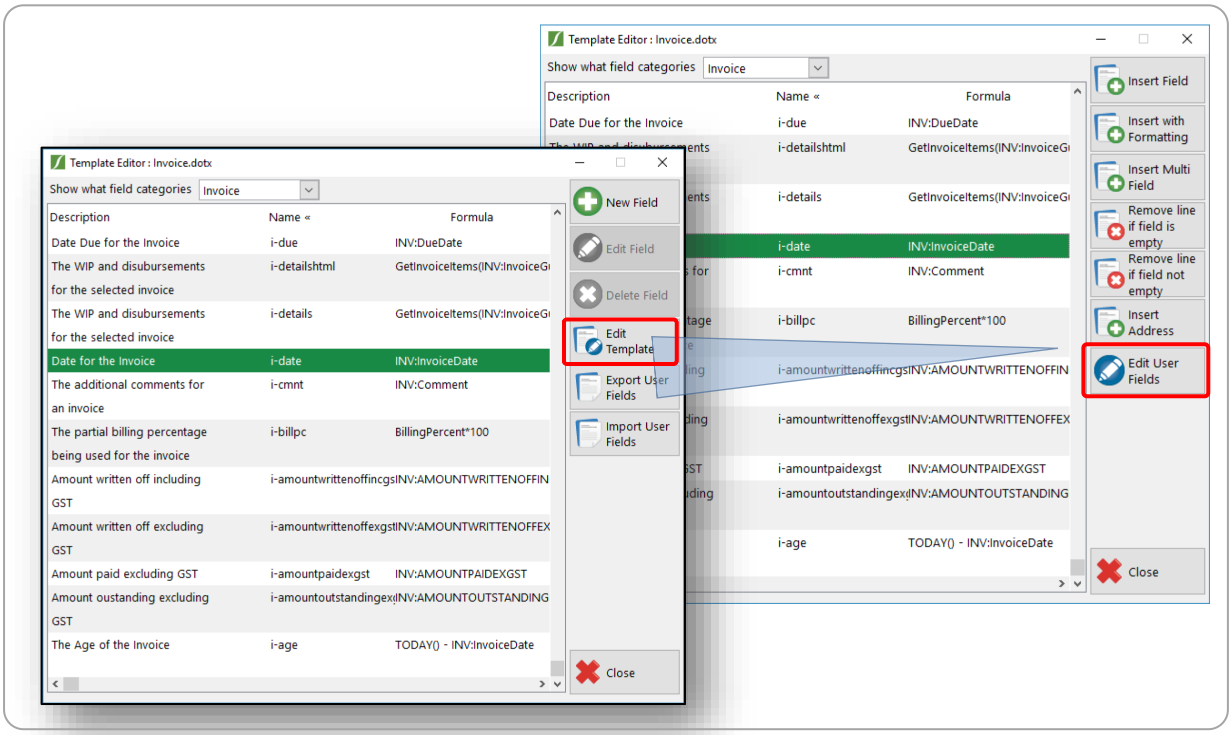
If there is a field code in SILQ that you would like to extend, you can create your own code for it.

An example may be that you want to insert a date into an invoice to specify that you want to be paid within 30 days from the invoice date. So what you can do is take the current invoice date field code and then create a new code so it will add on an extra 30 days to the date. This new field code can then be added to your invoice template.

Another type of customised field code is question prompting. Whereby you can create a field code that will ask a question when a document is generated, that will allow you to input the answer that will display on the document.

First we will look at customising a field code from an existing field code, and then we will look at creating a customised field code with a question.

Creating a customised field code from an existing field code:



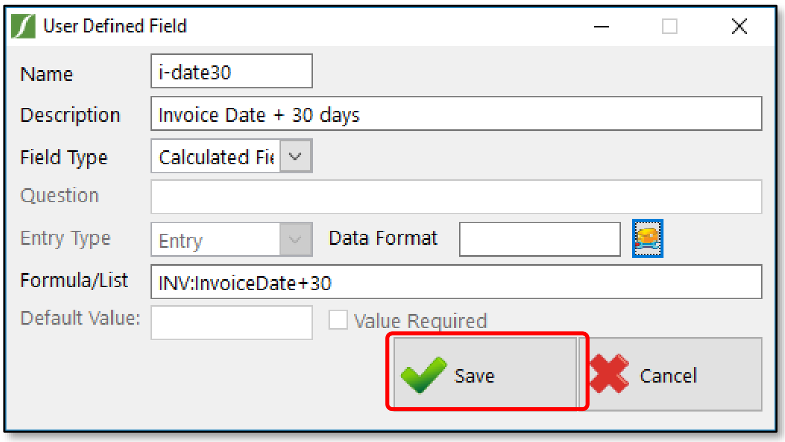
To create your own customised field code from an existing field code, from the Template Editor follow the steps below:

Step 1: First identify a field code you would like to extend on. In our example we will be looking at adding an extra 30 days to the existing invoice date.

Step 2: In the Template Editor click on the **Edit User Fields** button and then click on the **New Field** button.

Step 3: The **User Defined Field** dialogue box will open up. Enter a unique name for this code into the Name field. In our example it will be **i-date30**, indicating that this will be the invoice date + 30 days extra. The original invoice field code is **i-date**, so adding 30 on the end is a natural progression. Next type in a description for the new field code field into the description field. In our example it is **Invoice Date + 30 days.** Make sure the field type drop down menu is **Calculated Field.**

Step 4: Lastly you need to enter a formula into the **Formula/List field.** What you need to do is look at the field code for the existing code that you are extending on. In our example the invoice date code is: **INV:InvoiceDate.** To add on the extra 30 days you need to add **+30** to the code. So the final formula will be: **INV:InvoiceDate+30.**



Step 5: Once you have entered the formula, click on the **Save** button.

Your new customised field will now appear in the Template Editor in the User Defined category. It will always be there for you to use in any template you wish to add it to.

Creating a customised question prompt field code:

Another type of customised field code is question prompting. Whereby you can create a field code that will ask a question when a document is generated, that will allow you to input the answer that will display on the document.

In our example we will create a prompt field asking if this matter is a litigious matter. A prompt field will appear with the default answer as Yes. No can be typed in and then this answer will be generated on the document.

To create a customised question prompt field code from the Template Editor, follow the steps below:

Step 1: In the Template Editor click on the **Edit User Fields** button and then click on the **New Field** button. This will open up the **User Defined Field** dialogue box. A screen shot of this can be seen on page 23.

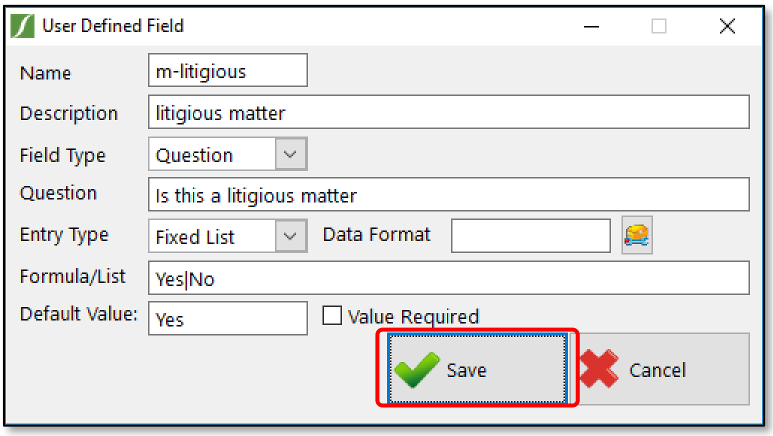
Step 2: Enter a unique name for this code into the Name field. In our example it will be **m-litigious**, indicating that this will be a question in relation to a matter. Next type in a description for the new field code field into the description field. In our example it is **litigious matter.** Make sure the field type drop down menu is **Question.**

Step 3: Next from the Entry type drop down menu select how you would like what type of input the user gets. The options are:

Entry: This is a text field to enter, limited to one line.
Spin: A field with up and down arrows that scroll through options to select
Optional List: A drop down list with options to select from. A user can enter their own text as well.
Fixed List: A drop down list with fixed options to select from.
Text: Multi line text field.

In the example below, a Fixed list has been selected, so the user has to select Yes or No.

Step 3: You need to enter a formula into the **Formula/List field.** This will be the options to choose from when the prompt field is presented to you when generating the document. The two answers to our questions in the example are **Yes|No.** All options in the formula field need to be separated with a **'|'.** If you want a default answer to appear, type it into the **Default Value** field. In our example it will be **Yes**. Clicking on the **Value Required** tickbox will force an answer to be entered.



Step 5: Once you have finished, click on the **Save** button.

4. Template Variables

Variables are what make the document generator in SILQ powerful.

They allow you to access almost any data in the database in the way that you want and format the data to look how you want.

Variables that are resolved when you generate the Document are enclosed in angle brackets. Ie < and >.

For example:
- the variable <i:today> will be resolved as today's date;
- the variable <i:s-bn> will be resolved as the SILQ user's name.

4.1 Variable Syntax

SILQ Variables have a very specific format so that when the template is processed SILQ can recognise exactly what to do with it. Below is the definition of how variables should look.

<vartype:varname[:varformattype[:varformatextra]]>

vartype: This variable type directs the template system as to what sort of action it should take in this instance, as per the list of variable types below.

varname: This is the name of the value that the action is to act on.

varformattype [optional]: this indicates how the value should be formatted, as per the Format Types below

varformatextra [optional]: this is extra information about how the variable should be formatted., as per the Format Types below

Variable Name

When using the I, E, N, PE, or PN variable types, this is the name of the variable as set in the merge field list, that will be used as the source of data for the operation.
If you are using a multi field, it indicates which database it is to iterate through. A full list of these can be found in the template editor.

Examples

<i:i-date:d:18> This will insert the "i-date" field (which is invoice's date value), and then format it as a date, using the 18th date format (which is the windows long date format)

<i:i-date> This will insert the i-date field and use the default formatting for that field

<multi:invoice:date> Iterate through the invoices for the selected matter and order it by the invoice date.

4.2 variable Types

There are a number of different variable types that act differently within a template. These are specified as the first component of a field to tell SILQ what to do.

I: Insert value
This will insert a value from the database. It requires that the field to be inserted must be specified as the second parameter.

E: Remove line if field is empty
This will remove the paragraph if the field is empty. A field is considered "empty" if it is blank or has the value "No" or has a zero value. If it is in a table it will remove the row.
varformattype and varformatextra are ignored.

N: Remove line if field is not empty
This will remove the paragraph if the value is not empty. A field is considered "empty" if it is blank or has the value "No" or has a zero value. If it is in a table it will remove the row.
varformattype and varformatextra are ignored.

PE: Remove paragraph if field is empty
This will remove the paragraph if the value is empty. If it is in a table it will still only remove the paragraph and not the row.
varformattype and varformatextra are ignored

PN: Remove paragraph if field not empty
This will remove the paragraph if the value is not empty. If it is in a table it will still only remove the paragraph and not the row.
varformattype and varformatextra are ignored

Multi: Generate Multiple rows
This will make the system generate multiple rows of data of the type that is specified. There are many multi fields that will iterate through a particular database and allow you to generate tables of information.
varformattype and varformatextra are ignored

Examples

<i:i-date> Will insert a the i-date field

Ref: <i:m-ref><e:m-ref> This will put the literal text "Ref:" at the start of the line, then insert the m-ref field for the first field, but if the m-ref is empty it will remove the entire line so only end up with a reference line if there is a reference.

<i:i-id> <i:i-date> <i:i-pay> <i:i-recint> <i:i-out> <e:i-out> <multi:invoice>
This is an advanced use of the fields where they have been combined to achieve the required result. The multi field "<multi:invoice>" in this case will iterate through all invoices for a particular matter and create a row for each of the invoices.

The <e:i-out> field tells SILQ to remove the row for a particular invoice if the amount outstanding for the invoiced is zero. As such this will generate a list of outstanding invoices for the selected matter.

4.3 Variable Formats

Variable Format Type

When using the I Variable type, this will format the data in the desired way.

The valid Format Types are:

D: Date
This is used when formatting the variable into a date format.

T: Time
This is used when formatting the variable into a time format.

N: Numeric
This is used when formatting the variable into a numeric format.

S: String
This is used when formatting the variable into a string format.

U: Uppercase
This is used when formatting a text value into upper case.
varformatextra is ignored

L: Lower Case
This is used when formatting a text value into lower case.
varformatextra is ignored

Variable Format Extra
The Format Extra gives extra information as to how the variable should be formatted.

Dates

D:[d]n[s][B]

d: Day of week specifier. If a d is included at the beginning of the format it will prepend the day of week.

n: Determines the date picture format. Date picture formats range from 1 through 18. A leading zero (0) indicates a zero-filled day or month.

s: A separation character between the month, day, and year components. If omitted, the slash (/) appears.

. (period) Produces periods
' (grave accent) Produces commas
- (hyphen) Produces hyphens
_ (underscore) Produces spaces

range: An integer constant in the range of zero (0) to ninety-nine (99) that specifies the "Intellidate" century for the direction parameter. Valid only on date pictures with two-digit years. If omitted, the default value is 80.

B: Specifies that the format displays as blank when the value is zero.

Examples:

Picture	Format	Result
D:1	mm/dd/yy	10/31/59
D:01	mm/dd/yy	01/01/59
D:2	mm/dd/yyyy	10/31/1959
D:3	mmm dd, yyyy	OCT 31,1959
D:4	mmmmmmmmm dd, yyyy	October 31, 1959
D:D4	dddd, mmmmmmmmm dd, yyyy	Tuesday, October 31, 1959
D:5	dd/mm/yy	31/10/59
D:6	dd/mm/yyyy	31/10/1959
D:7	dd mmm yy	31 OCT 59
D:8	dd mmm yyyy	31 OCT 1959
D:9	yy/mm/dd	59/10/31
D:10	yyyy/mm/dd	1959/10/31
D:11	yymmdd	591031
D:12	yyyymmdd	19591031
D:13	mm/yy	10/59
D:14	mm/yyyy	10/1959
D:15	yy/mm	59/10
D:16	yyyy/mm	1959/10
D:17	Windows Control Panel setting for Short Date	
D:18	Windows Control Panel setting for Long Date	

Alternate Separators

D:1. mm.dd.yy Period separator
D:2- mm-dd-yyyy Dash separator
D:5_ dd mm yy Underscore produces space separator
D:6' dd,mm,yyyy Grave accent produces comma separator

Time

T: n[s][B]

n: Determines the time picture format. Time picture formats range from 1 through 8. A leading zero (0) indicates zero-filled hours.

s: A separation character. By default, colon (:) characters appear between the hour, minute, and second components of certain time picture formats. The following s indicators provide an alternate separation character for these formats.

. (period) Produces periods
' (grave accent) Produces commas
- (hyphen) Produces hyphens
_ (underscore) Produces spaces

B: Specifies that the format displays as blank when the value is zero.

Examples:

Picture	**Format**	**Result**
T:1	hh:mm	17:30
T:2	hhmm	1730
T:3	hh:mmXM	5:30PM
T:03	hh:mmXM	05:30PM
T:4	hh:mm:ss	17:30:00
T:5	hhmmss	173000
T:6	hh:mm:ssXM	5:30:00PM
T:7	Windows Control Panel setting for Short Time	
T:8	Windows Control Panel setting for Long Time	

Alternate Separators

T:1. hh.mm Period separator
T:1- hh-mm Dash separator
T:3_ hh mmXM Underscore produces space separator
T:4' hh,mm,ss Grave accent produces comma separator

Numeric

N:[currency][sign][fill]size[grouping][places][sign][currency][B]

currency: Either a dollar sign ($) or any string constant enclosed in tildes (~). When it precedes the sign indicator and there is no fill indicator, the currency symbol "floats" to the left of the high order digit. If there is a fill indicator, the currency symbol remains fixed in the left-most position. If the currency indicator follows the size and grouping, it appears at the end of the number displayed.

sign: Specifies the display format for negative numbers. If a plus (+) precedes the fill and size indicators, positive numbers will display with a leading plus (+) sign and negative numbers will display with a leading minus (-) sign. If a hyphen precedes the fill and size indicators, negative numbers will display with a leading minus sign. If a hyphen follows the size, places, and currency indicators, negative numbers will display with a trailing minus sign. If parentheses are placed in both positions, negative numbers will be displayed enclosed in parentheses. To prevent ambiguity, a trailing minus sign should always have grouping specified.

fill: Specifies leading zeros, spaces, or asterisks (*) in any leading zero positions, and suppressesdefault grouping. If the fill is omitted, leading zeros are suppressed.

0 (zero) Produces leading zeroes
_ (underscore) Produces leading spaces
*** (asterisk)** Produces leading asterisks

size: The size is required to specify the total number of significant digits to display, including the number of digits in the places indicator and any formatting characters.

grouping: A grouping symbol, other than a comma (the default), can appear right of the size indicator to specify a three digit group separator. To prevent ambiguity, a hyphen grouping indicator should also specify the sign.

. (period) Produces periods
- (hyphen) Produces hyphens
_ (underscore) Produces spaces

places: Specifies the decimal separator symbol and the number of decimal digits. The number of decimal digits must be less than the size. The decimal separator may be a period (.), grave accent (') (produces periods grouping unless overridden), or the letter "v" (used only for STRING field storage declarations--not for display).

. (period) Produces a period
' (grave accent) Produces a comma
v Produces no decimal separator

B: Specifies blank display whenever its value is zero.

The numeric and currency pictures format numeric values for screen display or in reports. If the value is greater than the maximum value the picture can display, a string of pound signs (#) is displayed.

Examples:

Numeric	**Result**	**Format**
N:9	4,550,000	Nine digits, group with commas (default)
N:_9B	4550000	Nine digits, no grouping, leading blanks if zero
N:09	004550000	Nine digits, leading zero
N:*9	***45,000	Nine digits, asterisk fill, group with commas
N:9_	4 550 000	Nine digits, group with spaces
N:9.	4.550.000	Nine digits, group with periods

Decimal	**Result**	**Format**
N:9.2	4,550.75	Two decimal places, period decimal separator
N:_9.2B	4550.75	Two decimal places, period decimal separator, no grouping, blank if zero
N:_9'2	4550,75	Two decimal places, comma decimal separator
N:9.'2	4.550,75	Comma decimal separator, group with periods
N:9_'2	4 550,75	Comma decimal separator, group with spaces,

Signed	**Result**	**Format**
N:-9.2B	-2,347.25	Leading minus sign, blank if zero
N:9.2-	2,347.25-	Trailing minus sign
N:(10.2)	(2,347.25)	Enclosed in parens when negative

Dollar	Currency	Result Format
N:$9.2B	$2,347.25	Leading dollar sign, blank if zero
N:$10.2-	$2,347.25-	Leading dollar sign, trailing minus when negative
N:$(11.2)	$(2,347.25)	Leading dollar sign, in parens when negative

String

S: length

length: Determines the number of characters in the picture format.

A string picture describes an unformatted string of a specific length.

Example:

Format: S:10
Original Value: ABCDEFGHIJKLMNOPQRSTUVWXYZ
Formatted Value: ABCDEFGHIJ

4.4 Multi Variables

Multi variables are what set SILQ apart from most mail merge systems. It allows you to generate rows of data that are relevant to the currently selected record.

Multis variables are of the form <multi:value:order>

The value tells the system which database to iterate through. This is generally context sensitive so it know what records to get. Ie when generating the Chronology multi it needs to know which matter it is being done for.

Example values are:

WIP: This will iterate through all of the Time Costed entries for the selected Invoice

Disb: This will iterate through all of the Disbursement entries for the selected Invoice.

Invoice: This will iterate through all of the Invoices for the selected Matter.

FirmInv: This will iterate through all of the Invoices for the selected Client

Auth: This will iterate through all of the Authority entries for the selected Matter.

Chrono: This will iterate through all of the Chronology entries for the selected Matter.

Estitem: This will iterate through all of the Estimate items for the selected Matter.

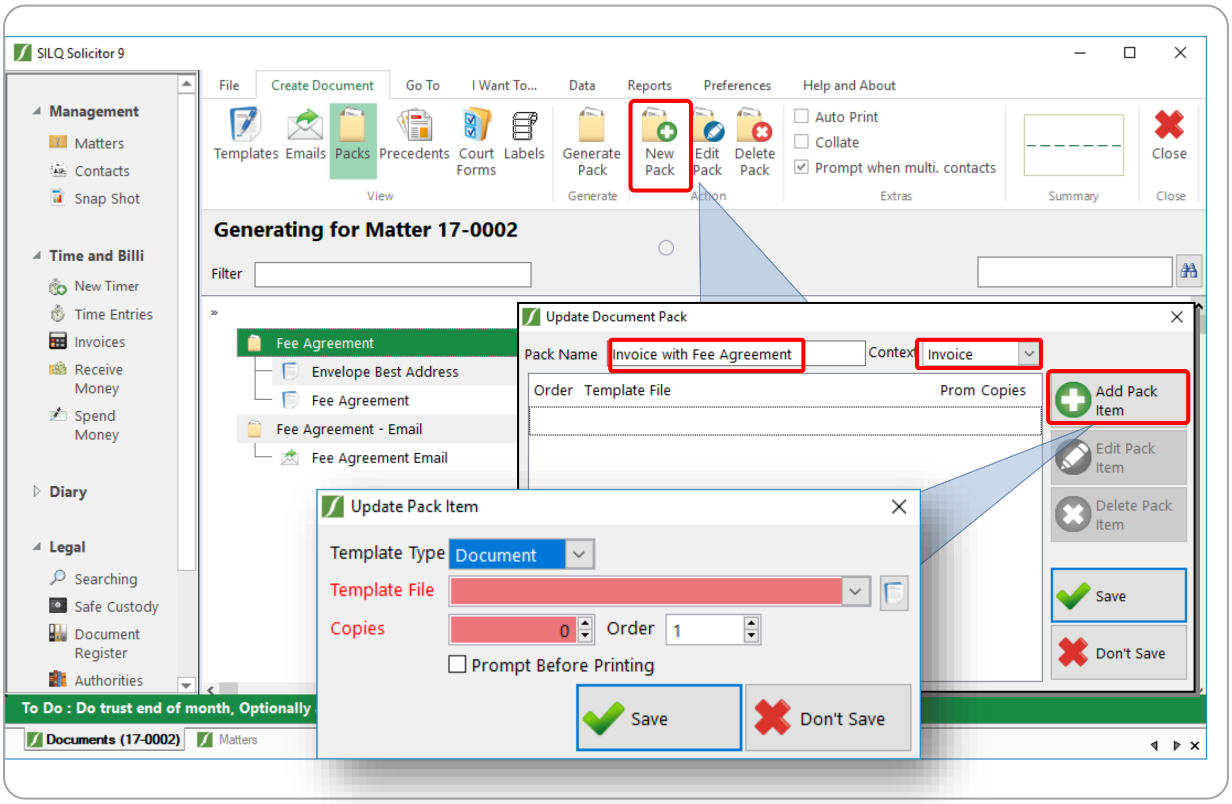
Many of the multi's have alternative order options so that you can have the records generated in a specific order. Refer to the template editor for the full list.

5. Document Packs

A document pack allows you to generate a number of relevant documents all together, instead of generating a single Document at a time.

For example: an Invoice Pack might include 2 copies of the Invoice, an Invoice cover letter and an envelope.

To access your document packs, depending on what type of document pack you want to view and create you need to access them from the relevant window. Eg. The Matters or Invoices window etc. In the example below the Documents window was accessed from the Invoices window by click on the **Document Templates** button on top toolbar, then click on **Packs**. You will see a list of your **Document Packs** and the documents they contain nested below each one.



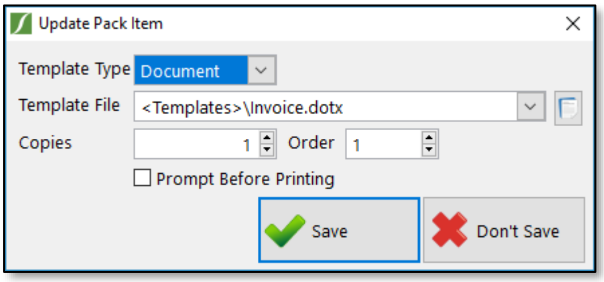
To create your own document packs follow the steps below:

Step 1: Click on the **New Pack** button on the top toolbar. The **Update Document Pack** window will open up.

Step 2: In the **Pack Name** field, the name that you want to know the Document Pack by. It needs to be unique. In the example above **Invoice with fee Agreement** was created.
In the **Context drop down menu,** enter the context that the Pack is to be used in. Select the context that indicates the sort of information that it will need to know in order to generate properly. For example, if the templates need to be generated for an Invoice, then choose the Invoice context (Eg. Invoice Pack, Bill Chaser Pack).

Step 3: To add templates to this document pack click on the **Add Pack Item.** The **Update Pack Item** window will open up.

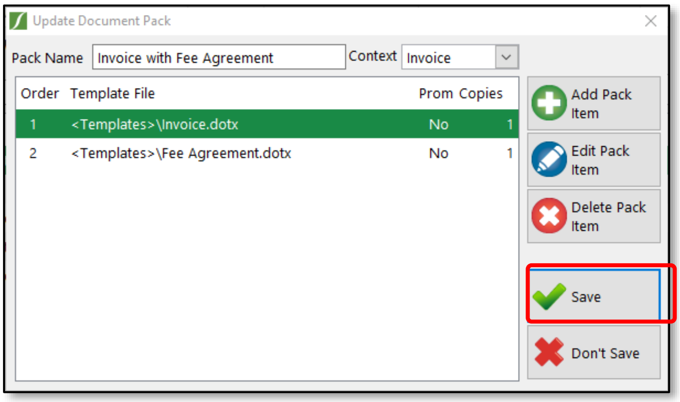
Step 4: from the **Template Type** drop down menu, select the type of template you want to generate. Either a document template or email template. Click on the icon to the right-hand side of the **Template File** field, and the Select File window will open up allowing you to select the template you want add to the document pack. In the Copies field, enter the number of copies you want to be printed when you are sending it automatically to the printer. If you check the **Prompt before Printing** button, the system will prompt you before it sends the document to the printer. This is useful if you are printing Envelopes as part of the Pack and you do not have separate tray for the envelopes so you have manually put the envelope in when it is needed.



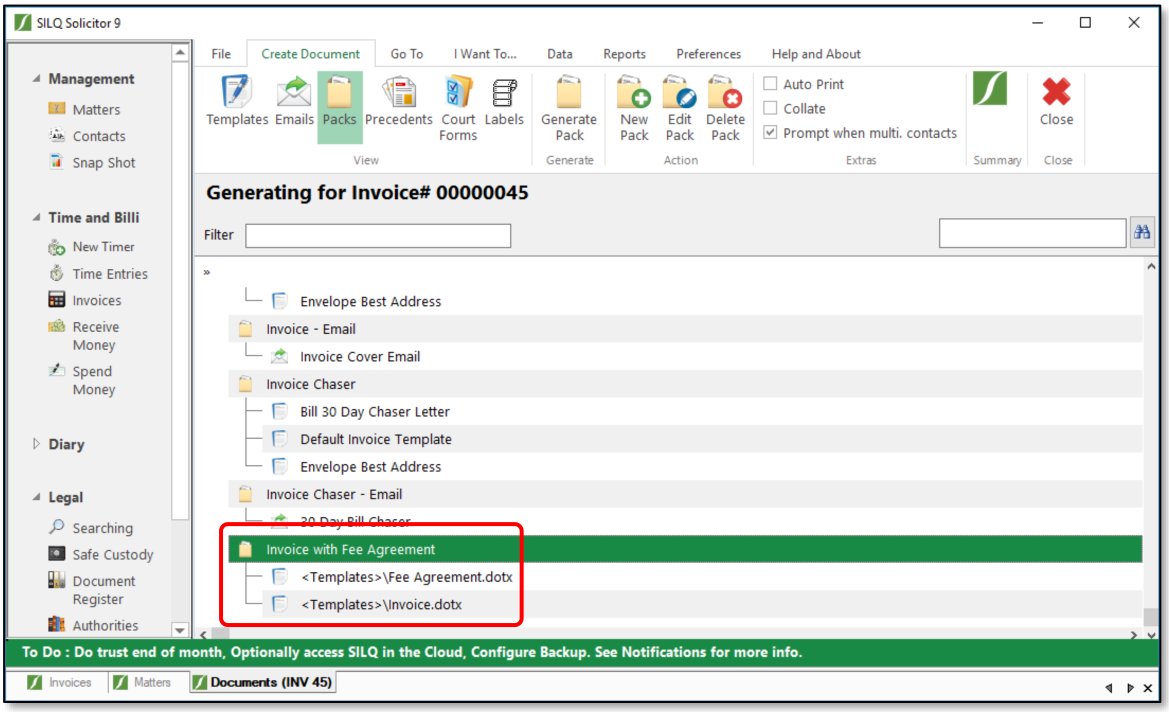
Next click on **Save**.

Step 5: Your selected template will be added to the template list. Repeat the above process to add the next document to the pack.

Once you have added all the documents you would like to be added to the pack click on the **Save** button in the Update Document Pack window.



Your new document pack will appear in the main Documents window.

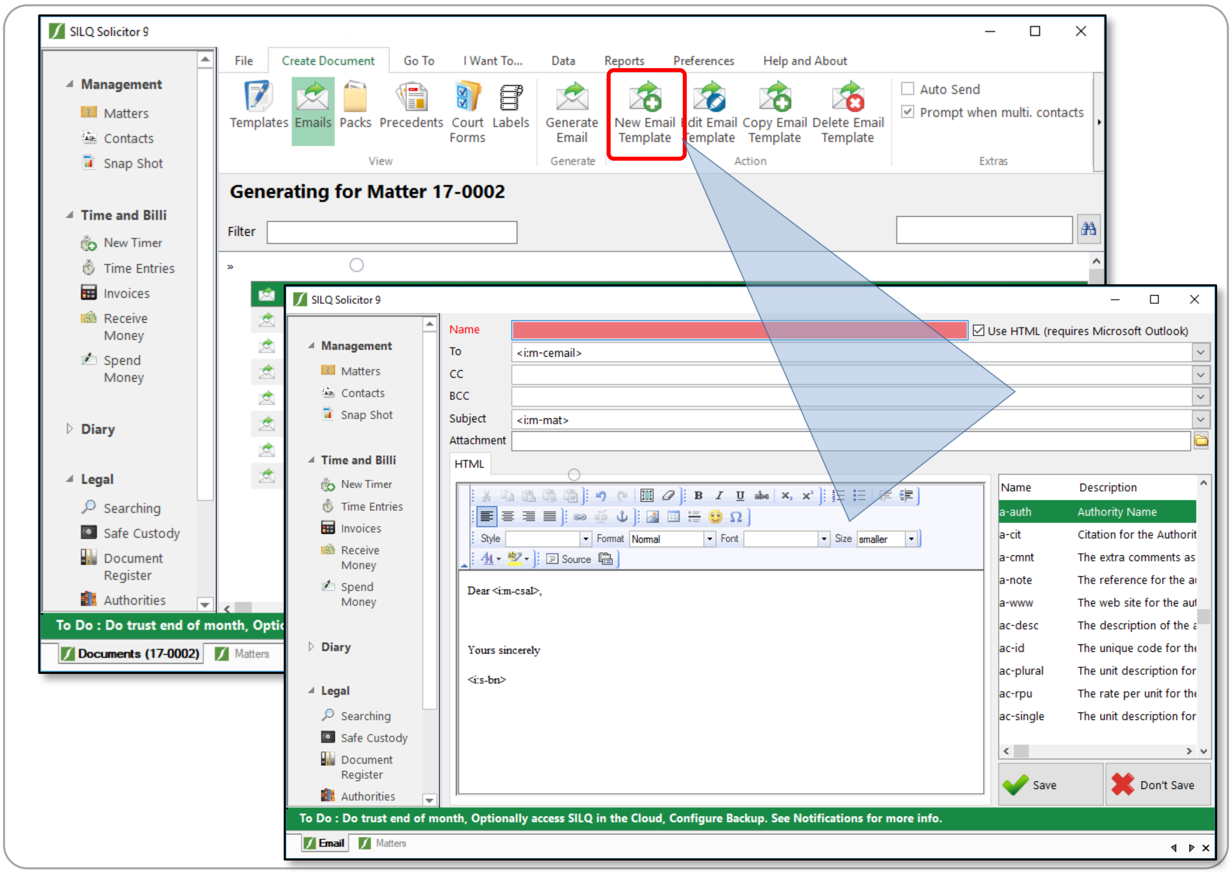


6. Email Templates

Email templates are similar to document templates, but instead of creating a document it will create an email. It will fill in such things as the contact's email address, the matter name, as well as being able to have content already prepared for the email, such as a bill cover email.

You have formatting control over the email, and can merge data from the database. All email templates are editable and you can create your own as well. Formatting is only available on the PC version of SILQ and requires Outlook.

To access your email templates, click on the **Document Templates** button on the top toolbar, then click on **Emails** in the Top Toolbar. You will see the available default email templates.



To create your own email template follow the steps below:

Step 1: Click on the **New Email Template** button on Top Toolbar. The **Email** window will open up.

Step 2: Construct your email template by filling in the following fields.

In the **Name** field, enter the name of the email so that when you see it in the list you know what email you are generating.

Clicking on the **Use HTML** tick box tells SILQ to use HTML. If you use HTML you can format the email template with font, size, colour etc.

The **To, CC & BCC** are the email fields. Typically you would enter something like <i:mc-email> which will insert the matter contact's email address. You can use the drop down list box for commonly used fields.

Subject is the subject line for the email. An example of what might be entered is <i:m-mat> which will insert the matter name.

Attachment: This can be a hard coded file name, such as "C:\Silq\Silq.docx" or it can be one of the either <i:invoice> or <i:receipt> which will attach the invoice or receipt document that has been created for a particular invoice or receipt, so that you can quickly email an invoice or receipt to someone.

HTML (PC Only) / Text : This is the text of the email. You can only use the HTML option (formatted text) when you are using Microsoft Outlook, any other email program requires that it be plain text.
Buttons

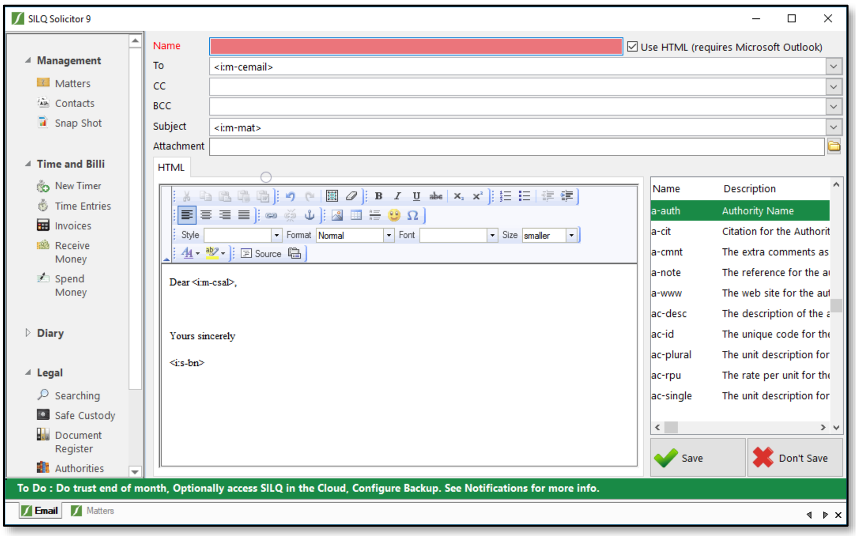
Formatting Buttons : (PC Only) There are a number of formatting buttons at the top of the HTML area if you are preparing a HTML email. Use them to format the text.

Field List
On the right of the window is a list of all fields that are available to be used in the template. If you right click on one of them you can get SILQ to type the field into the template definition in the correct syntax where the cursor is.

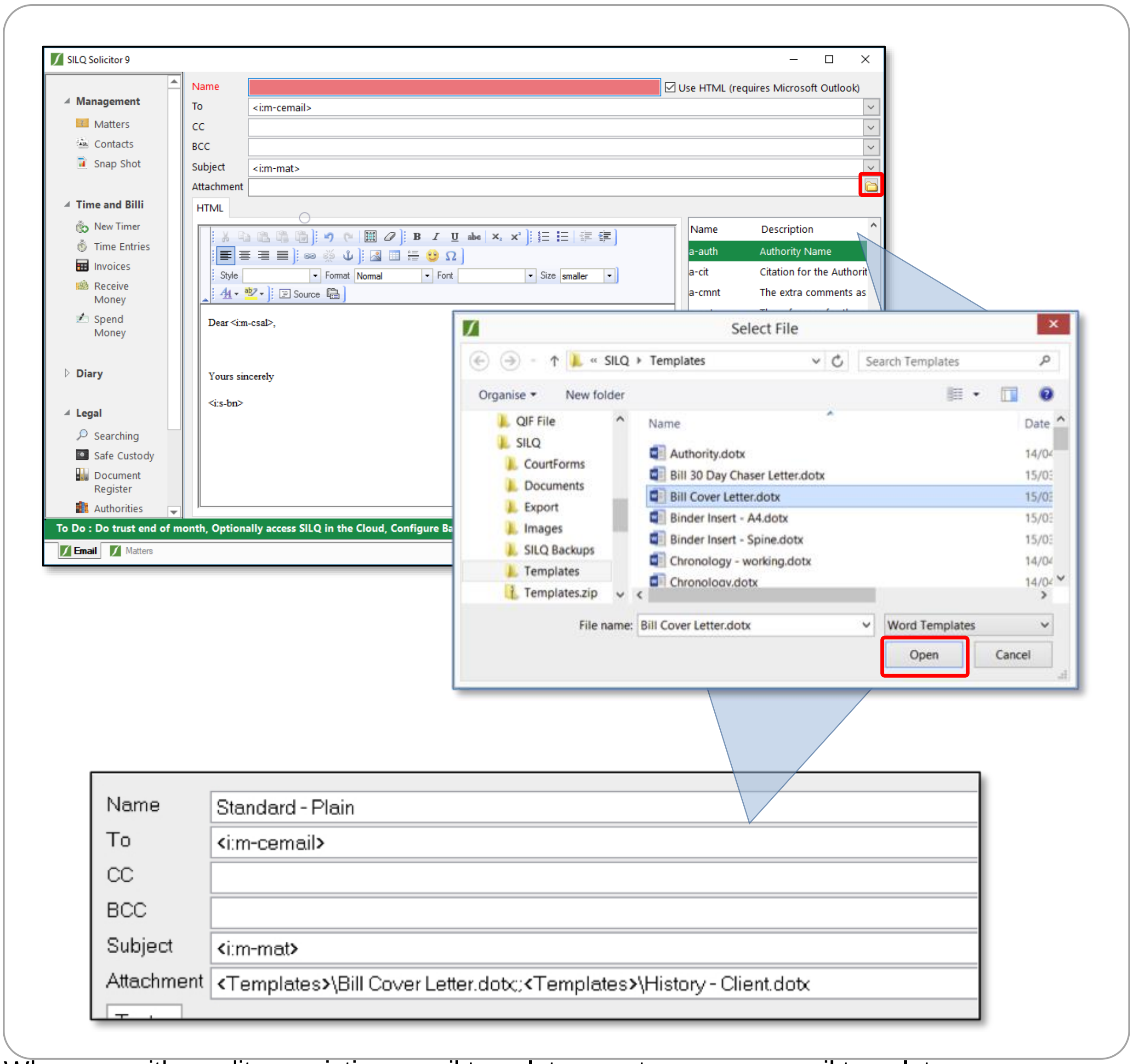
Variables
Just like in the Document Template Editing (refer to 4. Template Variables) you can use variables. These will insert data from the database into your email template making it quick and easy to generate a standard email.

Note: MULTI, E, N, PE and N are not supported in email templates.

Step 3: Once you have constructed your email template, click on the **Save** button on the bottom right-hand side of the window and your new email template will appear in the main Documents window.



6.1 Email Template Attachments



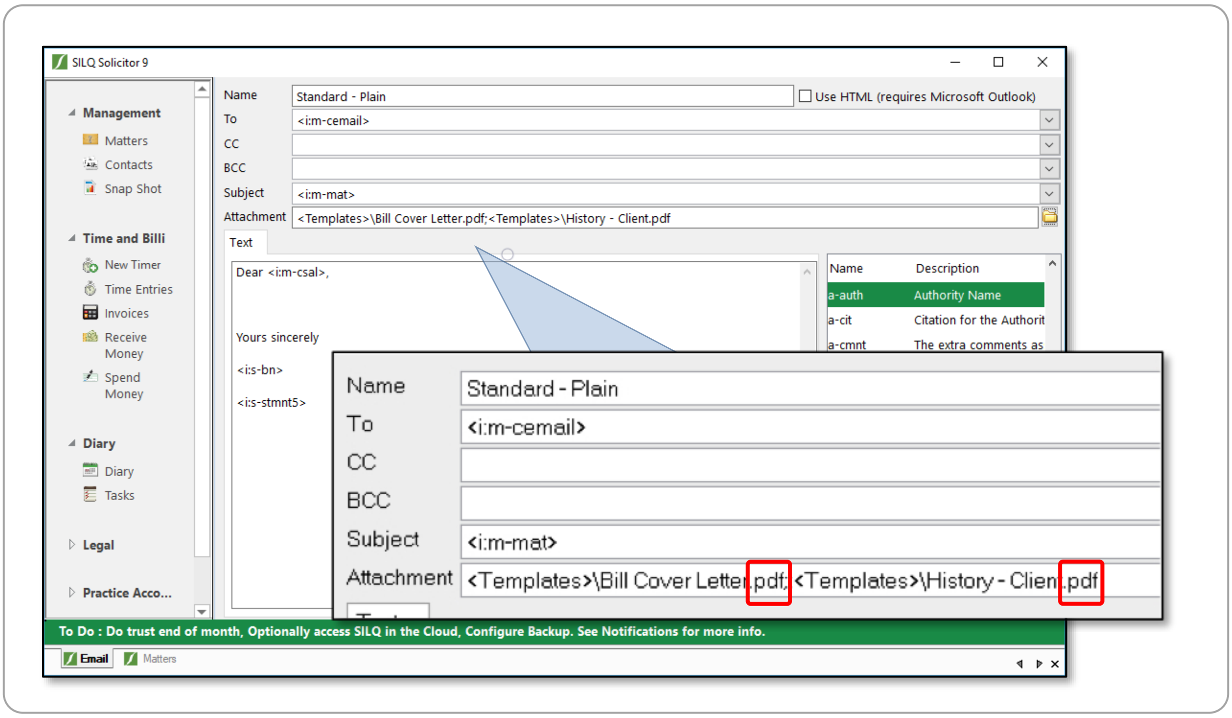
When you either edit an existing email template or set up a new email template, you can select which document templates you want SILQ to generate and automatically attach to the email before sending it.

To do this, while you are in the Edit email template screen, click on the folder icon to the right hand side of the Attachment field. You will be taken to the templates folder. Click to select an attachment to add to the email template and then click on the open button.

The document template will be added to the Attachment field. If you want to add additional document templates repeat this process.

Once you have added all the attachments to the email template and constructed your email template, click on the **Save** button on the bottom right-hand side of the window.

When you generate this email template from the documents window, SILQ will automatically generate, save and attach the word documents to the email, ready for you to email off to your client.



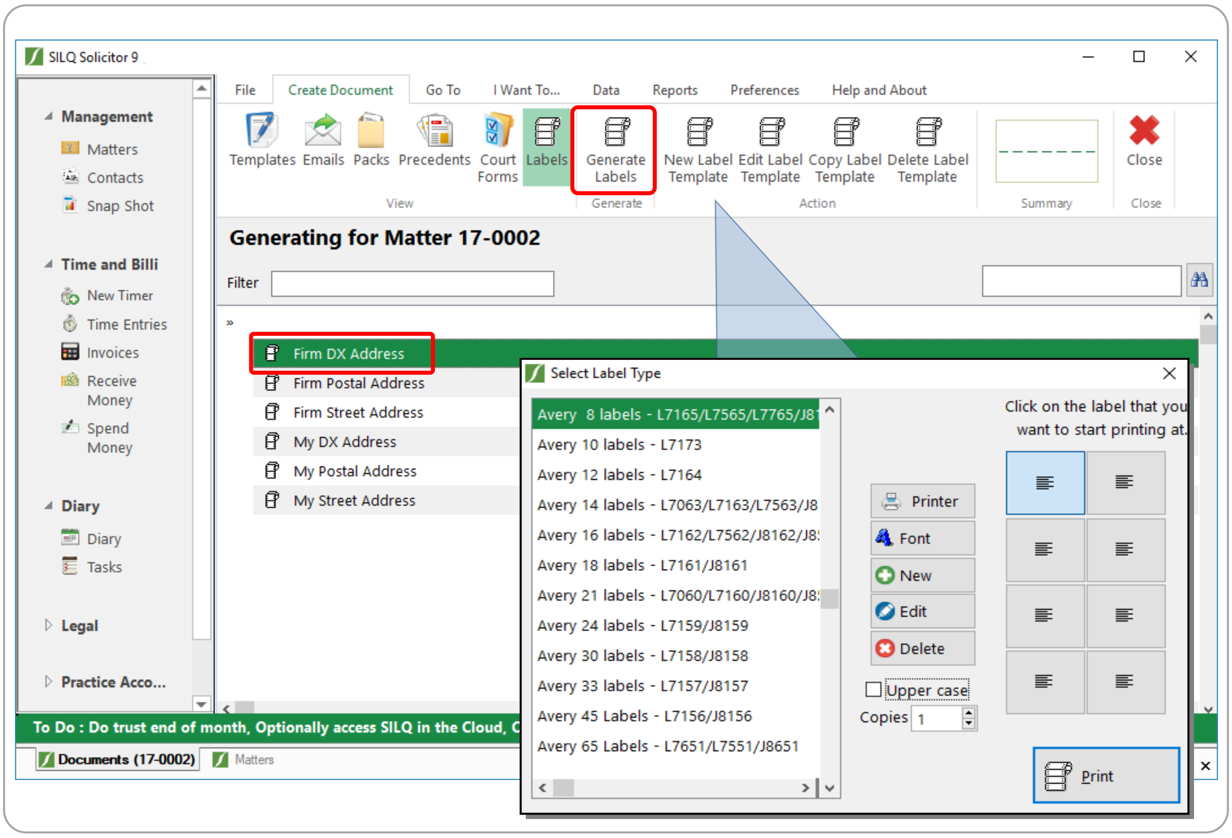
Another feature of the email template attachments is that you can get SILQ to automatically convert the generated word template into a PDF file which will get saved and attached to your email instead of the default word document. To do this, once you have selected the template to add, change the extension of the document name to **.pdf**.

If you have already generated a document previously that has been saved to the client's matter folder and you want the email template to add this original document as an attachment instead of generating the document again, you just need to change the extension of the document name to **.orig** that you add to your email template.

7. Label Templates

The label system allows you to print out sheet labels (Eg Avery labels) with any number of labels. It uses the same template system as the document and email templates, allowing you to have full control over what it generated. All label templates are editable and you can create your own as well.

To access your label templates, click on the **Document Templates** button on the top toolbar then click on **Labels** at the top. You will see the available default label templates.



As an example, to create a label to print out with a clients address on it follow the steps below:

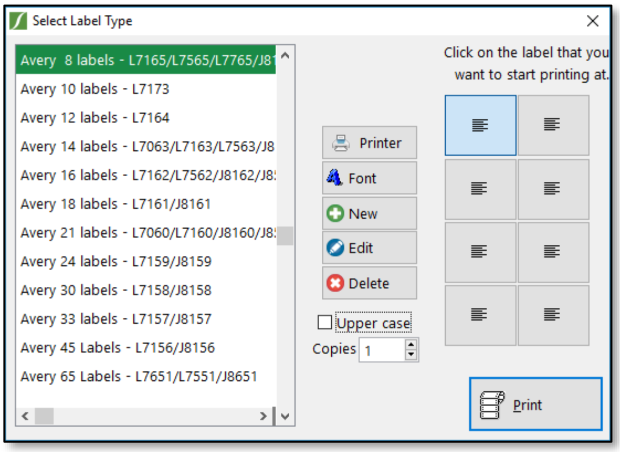
Step 1: From the Contacts window first click on the contact and then click on the Documents button on the right-hand side toolbar. The Documents window will open up.

Step 2: Next from the label templates section click on the **Firm Postal Address** label template and then click on the **Generate Labels** button to the right of the Documents window.

Step 3: The **Select Label Type** window will open up. Select the correct Avery label to print onto from the list. Next click on the Label that you want to start printing at. This is useful if you have already printed onto this label sheet previously, and therefore you can specify where to continue printing from.

Step 4: Other options that are in the **Select Label Type** window include:

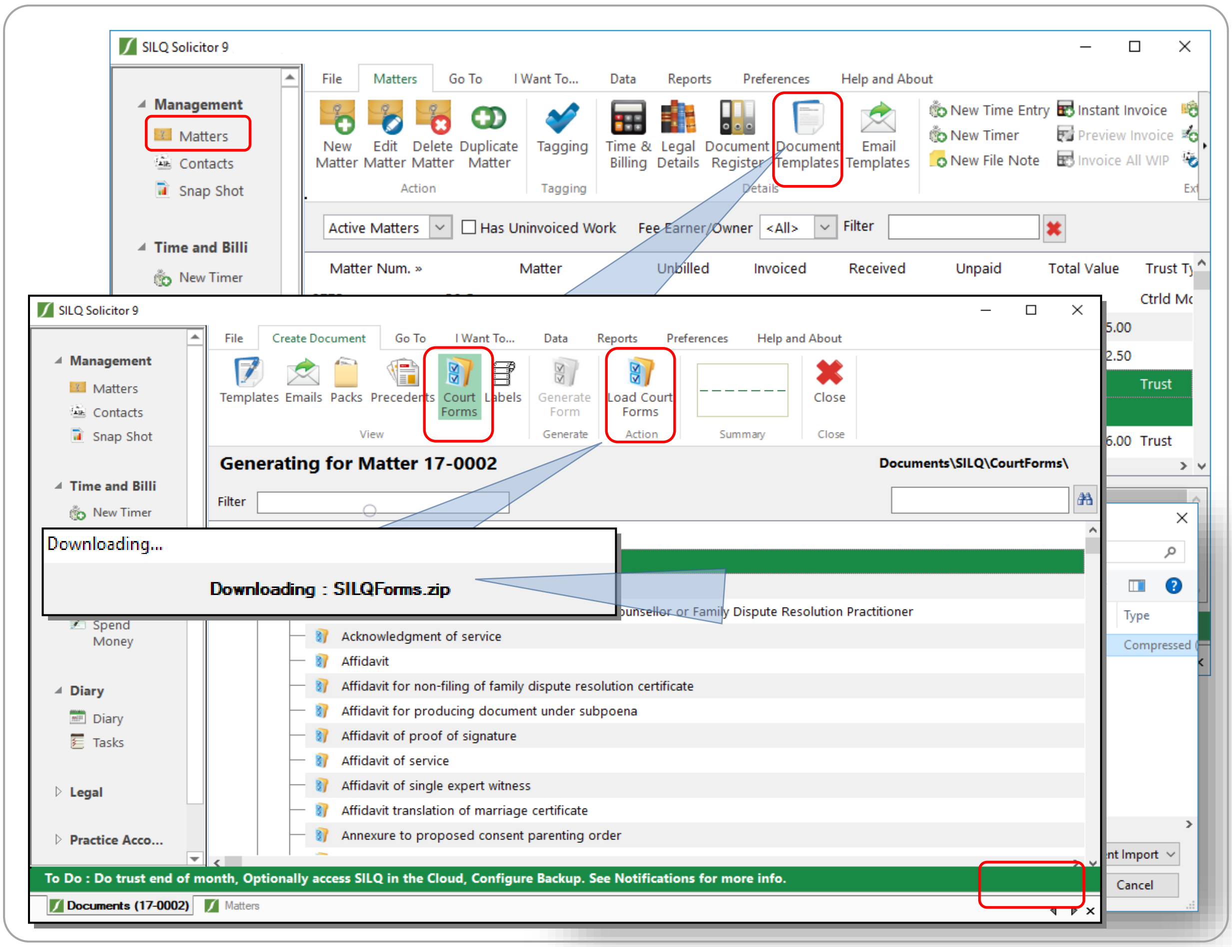
Printer: Clicking on this button allows you to select the printer
Font: You can specifiy the font for the label
New: Allows you to create a customised label with the correct dimensions if the one you want to use isn't listed.
Edit: Allows you to edit the dimensions of the label you have selected
Delete: You can delete a label that is selected
Uppercase: Ticking this box will print out the label in capitals
Copies: Specify how many copies you would like to print



Step 4: Once you are ready, click on the **Print** button. A print preview will be displayed, and if everything looks good, you can proceed to print your labels.

8. Court Forms and Precedents

8.1 Setting Up Court forms



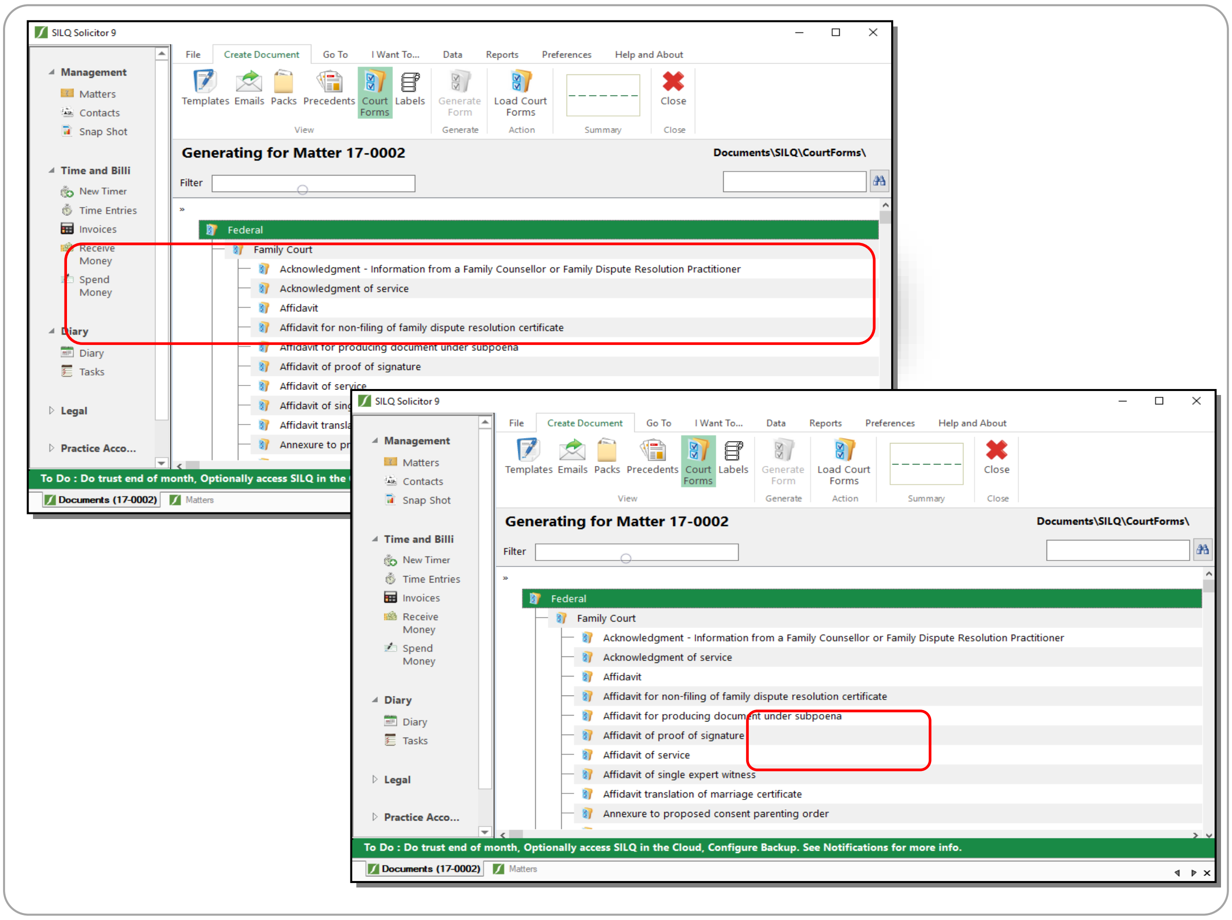
Before you can start using Court Forms, you need to load them into SILQ.

To do this you must first bring up the Court Forms window. Start from the Matters window, if you're not in the matters window click on Matters in the Left Navigation Bar.

Click on **Document Templates** on the Top Toolbar then click on **Court Forms**.

Next, click on the **Load Court Forms** button on the Top Toolbar of the Documents window and a message box will appear indicating that the court forms are being downloaded.

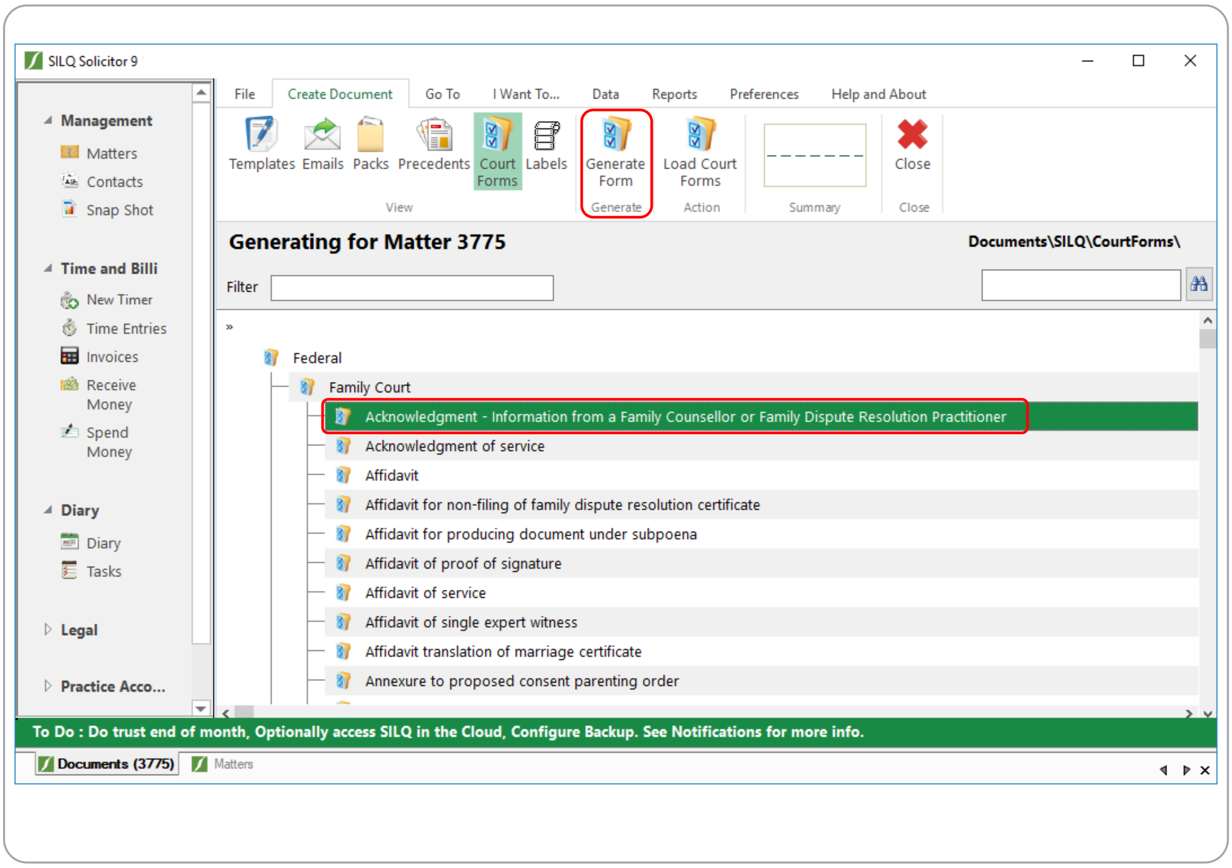
A dialogue box will open up and you will see **SILQForms.zip**. Click on **Open**.



A message will appear in the middle of the Court Forms window in SILQ, letting you know that the court forms are loading into SILQ.

Once completed a box will come up saying **Import Complete**. Click on the **OK** button.

8.2 Generating court forms in SILQ



Court forms are arranged by jurisdiction and then the area of law, which can be seen in the screen shot above.

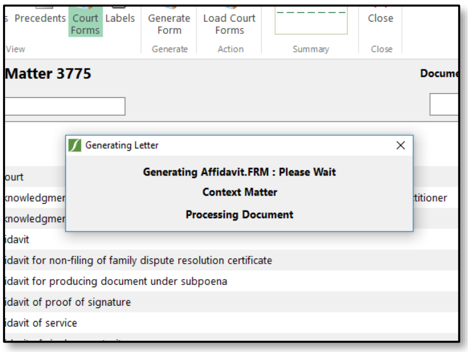
Upon completing the party information in your matter via the **Client & Correspondent** tab you are ready to process a precedent.

1. From the Matters window, highlight the matter you wish to generate a court form for then select the Document Templates button on the top toolbar.

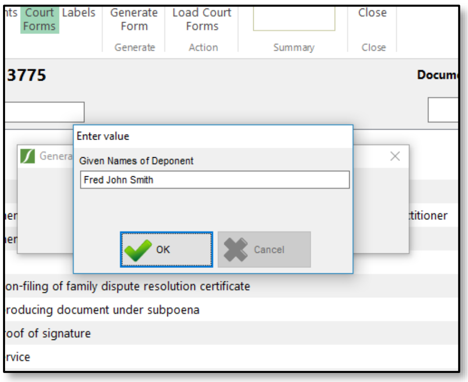
2. From the resulting menu click on **Court Forms** at the top, then highlight your Court Form.

3. To generate the form either double click on it, or highlight it, and then click on the **Generate Form** button at the top of the window.

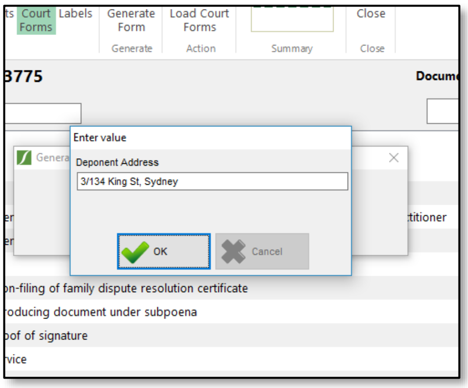
   We will be looking at generating Form 40(3) – Affidavit on the next page as an example.



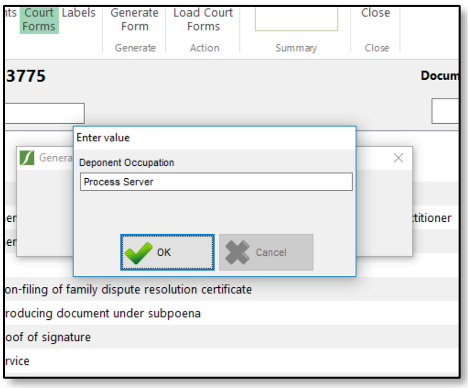
In the example to the left, we are merging an Affidavit. When you first click on the **Generate Form** button, a message will appear letting you know that SILQ is generating the form, and then afterwards you will be presented with a series of prompt fields to enter the information for the non-party information, which in this case is the Deponent details. Various different court forms in SILQ have prompt fields that appear, which require you to enter the required information in order to fill in the necessary details of the court form before it is generated.



4. Enter the Deponent Name; and click on OK.



5. Enter the full address of the Deponent; and click on OK.

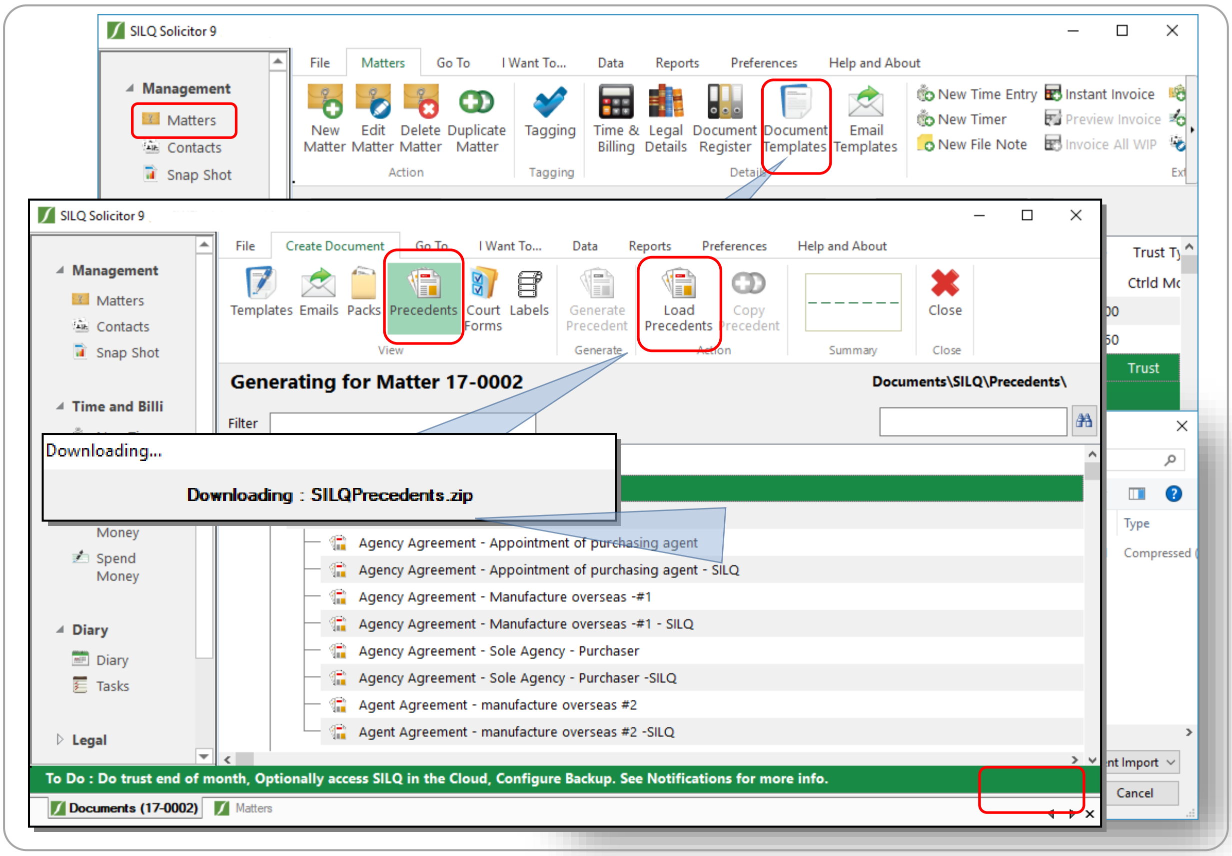


6. Enter the Occupation of the Deponent; and click on OK.

Once you have entered all the values, SILQ will generate the chosen court form and it will open up in Microsoft Word ready to be printed.

8.3 Setting Up Precedents

Note: You must subscribe to Precedents to use them. Please contact Sales on 1300 55 66 89 to enquire.



Before you can start using Precedents, you need to load them into SILQ.

To do this you must first bring up the Precedents window. Start from the Matters window, if you're not in the matters window click on Matters in the Left Navigation Bar.

Click on **Document Templates** on the Top Toolbar then click on **Precedents**.

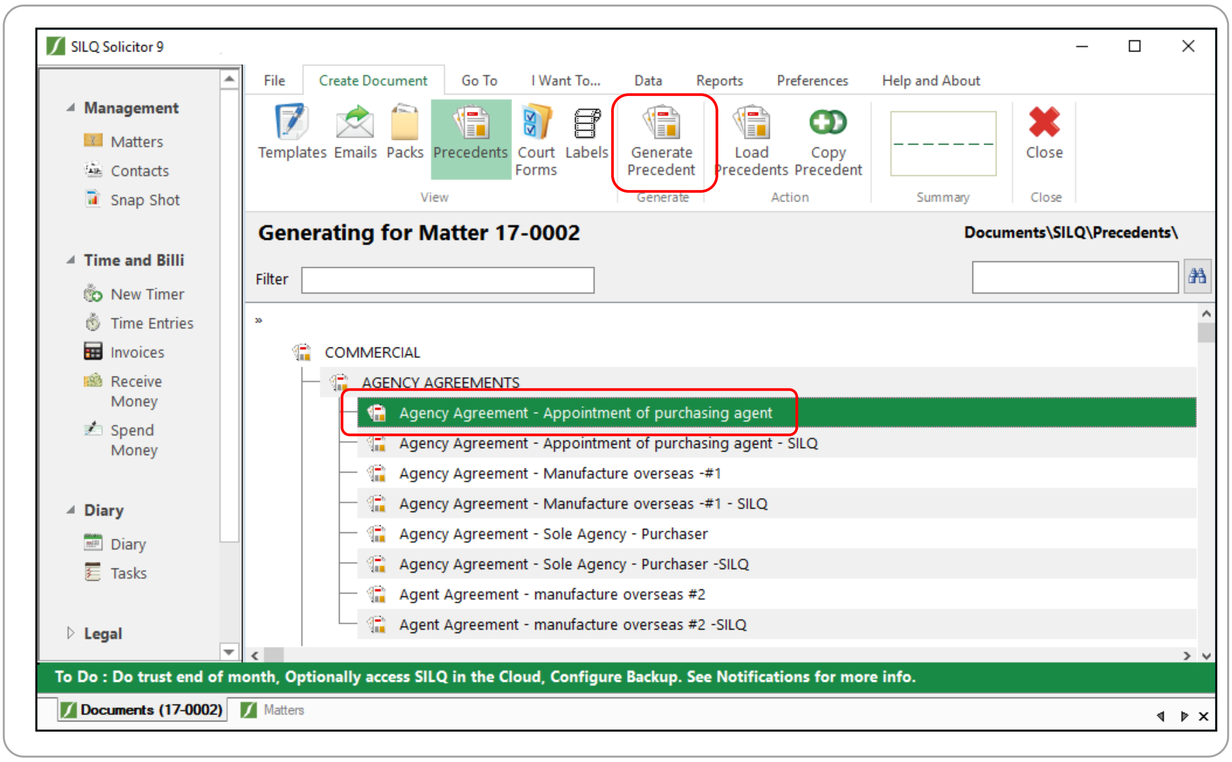
Next, click on the **Load Precedents** button on the Top Toolbar of the Documents window and a message box will appear indicating that the precedents are being downloaded.

A dialogue box will open up and you will see **SILQPrecedents.zip**. Click on **Open**.

A message will appear in the middle of the Precedents window in SILQ, letting you know that the precedents are loading into SILQ.

Once completed a box will come up saying **Import Complete**. Click on the **OK** button.

8.4 Generating Precedents in SILQ



Precedents are arranged in to different categories which can be seen in the screen shot above.

Generating a Precedent is exactly the same as generating a court form.

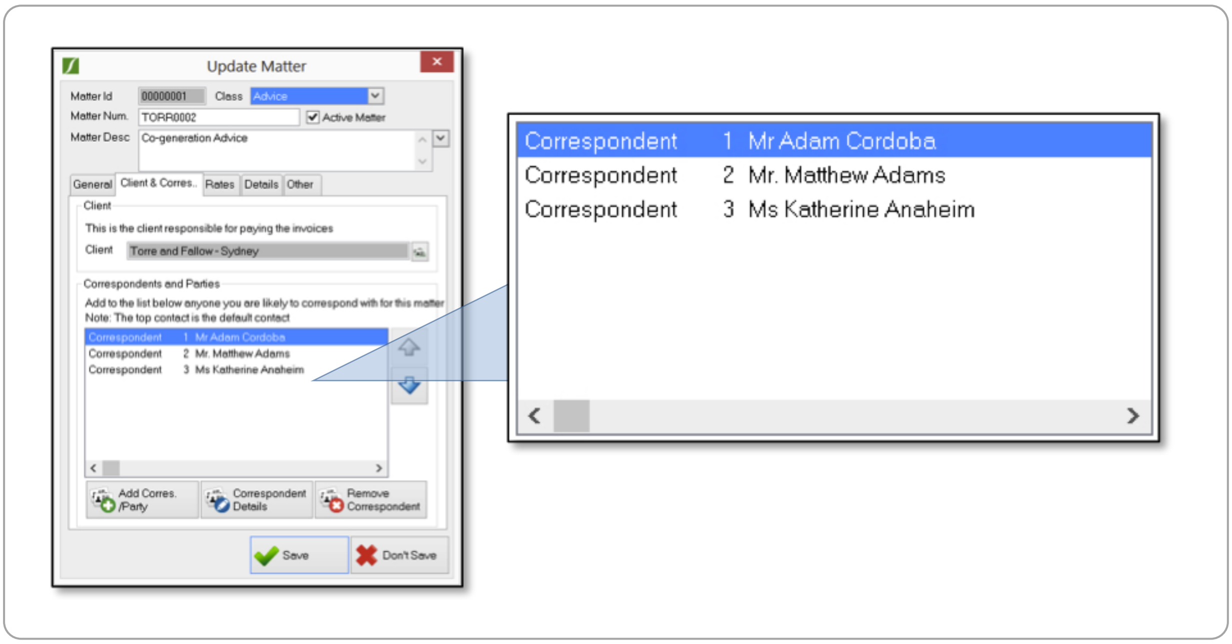
Upon completing the party information in your matter via the **Client & Correspondent** tab you are ready to process a precedent.

1. From the Matters window, highlight the matter you wish to generate a precedent for then select the Document Templates button on the top toolbar.

2. From the resulting menu click on **Precedents** at the top, then highlight your Precedent.

3. To generate the form either double click on it, or highlight it, and then click on the **Generate Precedent** button at the top of the window.

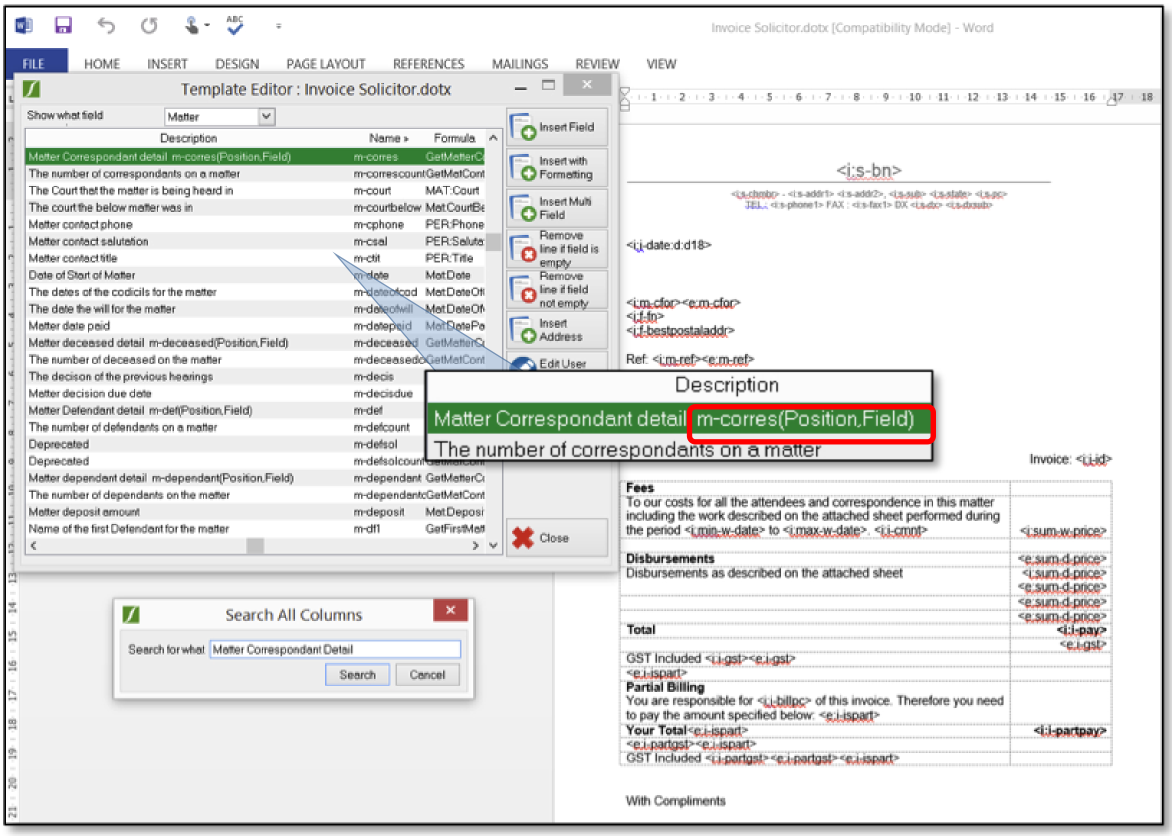
9. Inserting fields into templates for a specific correspondent



If you have multiple correspondents in a matter and you want to be able to customise a template so it pulls in the details of a specific correspondent, you can create a field code in the template editor to do just that.

In the example above, three **Correspondents** have been chosen for the matter.

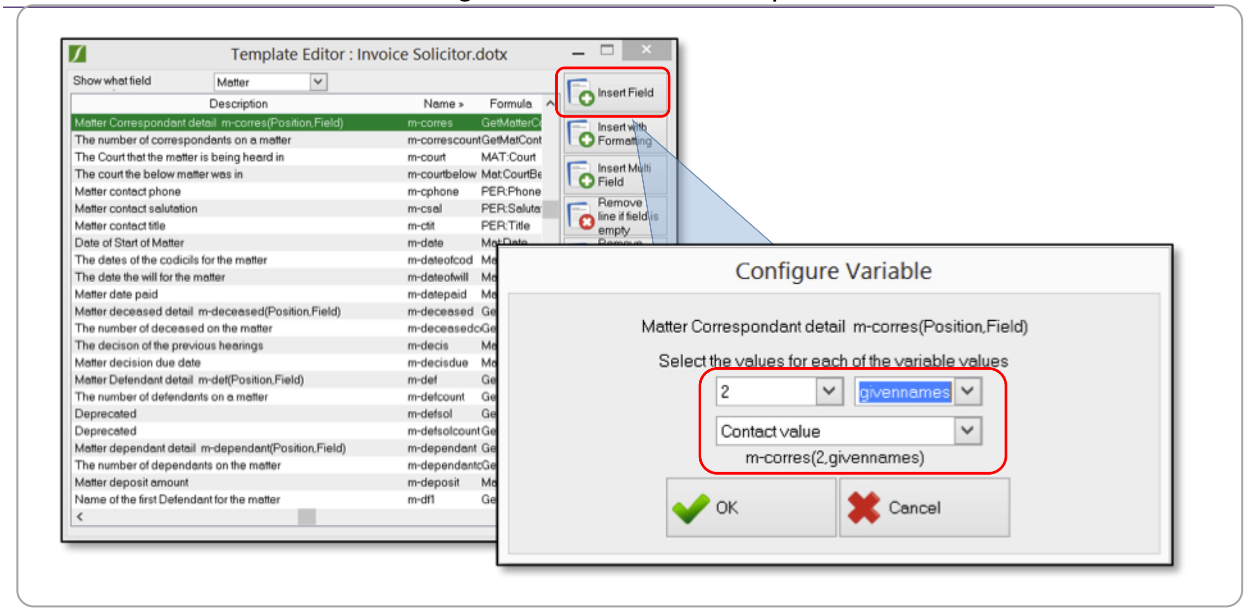
By default, if you generate an Invoice, Letter etc SILQ will use the first Correspondent on the list and address it to them. But if you want SILQ to address the document to the second, third etc person the list, you can create a customised field in the template editor.



To do this, from the matters screen, click on the **Documents** button on the top toolbar. Next select the template you want to add the customised field code to. In the example above we have selected the **Invoice Solicitor** template. Then click on the **Edit Template** button. The template will open in Word along with the SILQ template editor.

Within the editor search for the **Matter Correspondent Detail** field code by clicking on a record and then pressing the Ctrl + F keys on your keyboard.

You will see this record has (Position,Field) next to it. This means you can customise this field to specify which correspondent from the correspondent list in your matter you want to insert into the template.



Click in your Word template where you want to insert this field code. Then Click to select the **Matter Correspondent Detail** field code and then click on the **Insert Field** button. The **Configure Variable** window will open up.

This window will allow you to select which correspondent from the correspondent list in the matter you would like to insert into the template. In the first drop down menu select a number where the correspondent is listed in the matter. Eg. 1 will select the first correspondent on the list, 2 will select the second etc.

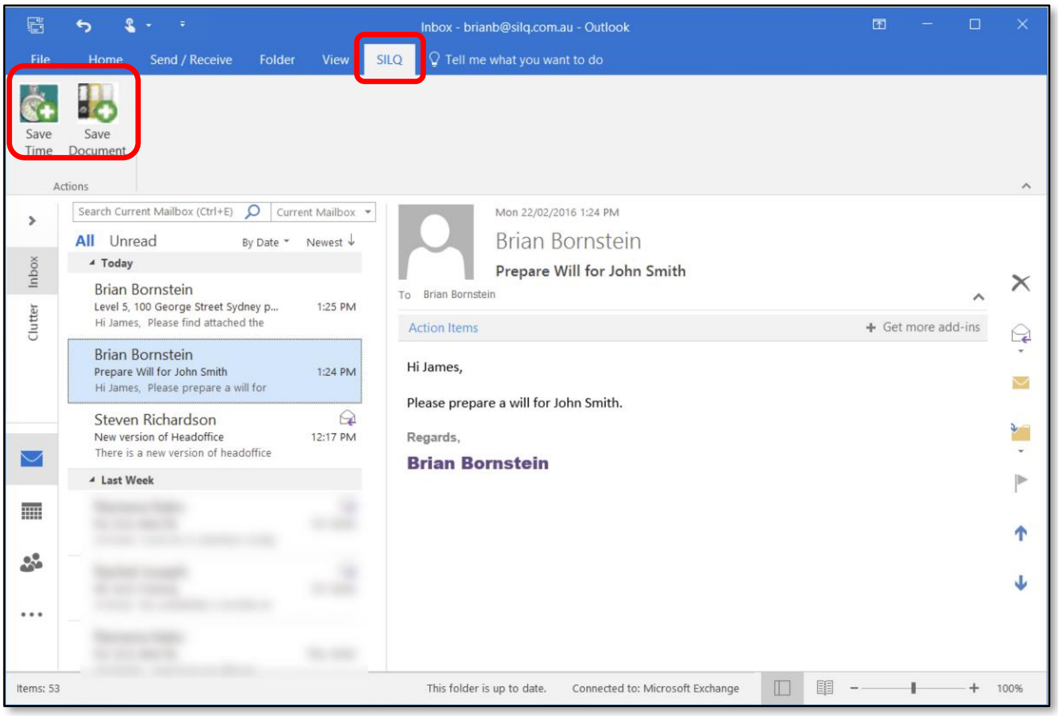
In the second drop down menu select what details of the correspondent you would like to insert into the template. In the example, **Contacts Given Name** has been selected.

In the last drop down menu, if this is just the actual contact, then leave the default setting as **Contact value**.

Then click on OK. The customised field will now be inserted into the template.

In the matter, under the Client and correspondent tab, if you click on the **Add Corres/Party** button, you will see a list of different party types that you can add correspondants to depending on their role in matter. In the template editor in this case you will see each of these party types also has a field code that you customise, so you can specify from the list which person and which variable you would like add to the template.

10. Accessing the SILQ Outlook Addin (SILQ Networked only)

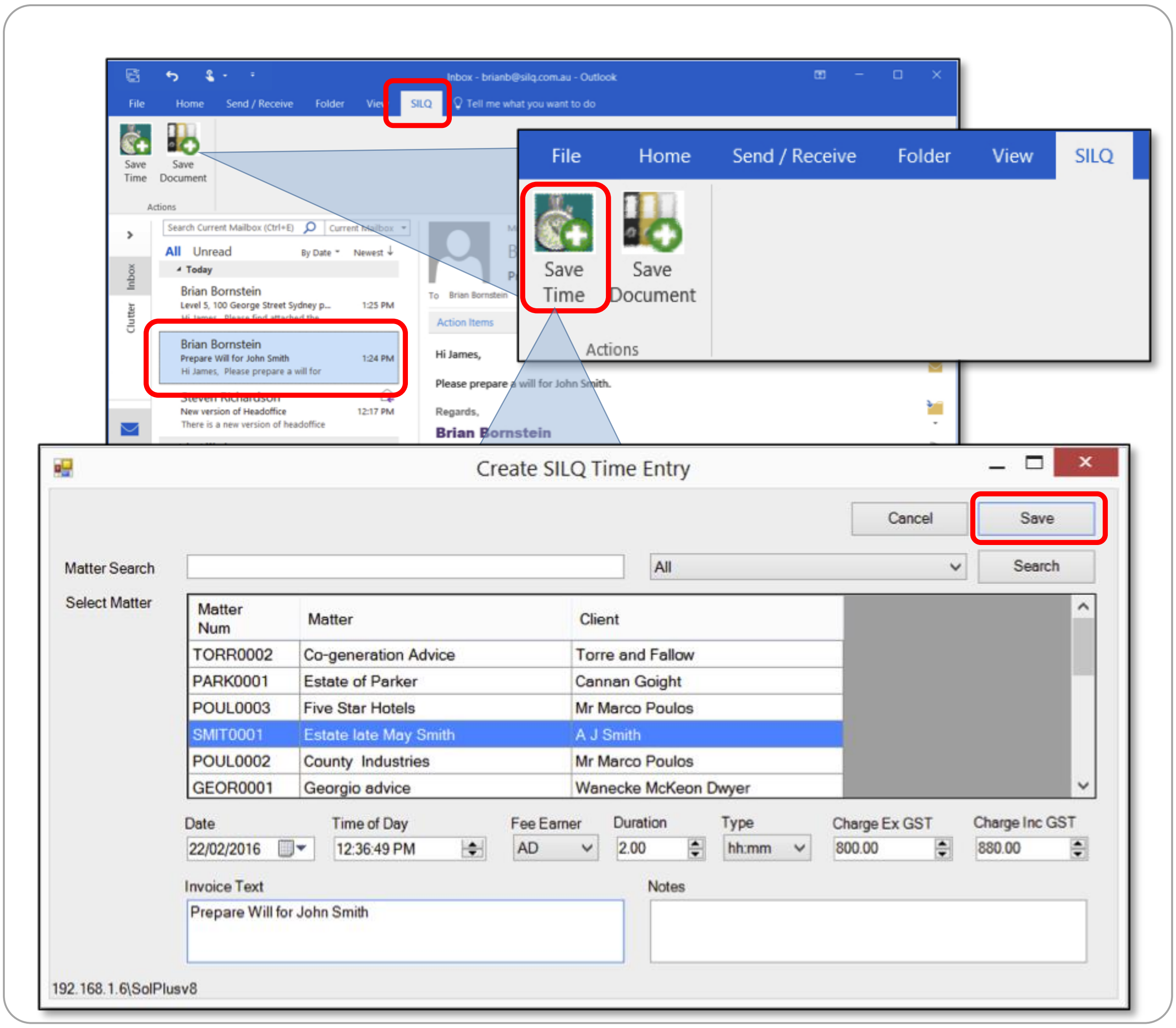


To enable to SILQ Adding go to the **File** menu then select **System Settings**, select **Miscellaneous** then click on the **Enable Outlook Addin for this database** button. Then restart Outlook.

Once the SILQ Outlook Addin has been enabled, to access it in Outlook click on the SILQ tab on the top of the Outlook window. Two buttons will appear in the ribbon at the top of Outlook. **Save Time** and **Save Document.**

To start recording time and saving documents, you will need to have SILQ open and be logged in, in order for it to work.

10.1 Record time from Outlook



To record time against a matter from Outlook in relation to an email, click on the SILQ tab on the top of the Outlook window. Two buttons will appear in the ribbon at the top of Outlook. **Save Time** and **Save Document.**

To record a time entry, first click on the email and then click on the **Save Time** button on the top ribbon.

The create SILQ Time Entry window will open up. A list of all your matters will appear in the middle of the window which you can scroll through to locate the matter you want to record the time entry against.

You can also perform a Matter search by typing in the name of the matter in the Matter Search Field and then from the drop down menu selecting '**All',** and then clicking on the search button. This will search for matters against all fee earners.

You can also filter matters against fee earners by just selecting the relevant fee earner from the drop down menu and then only the matters that have been assigned against that fee earner will display.

Once you have located the matter to record the time against, click once on it to select it.

Then fill in the relevant information in the fields below the Select Matter section.

You can enter the Date and Time of Day and the Fee earner to record the time entry against.

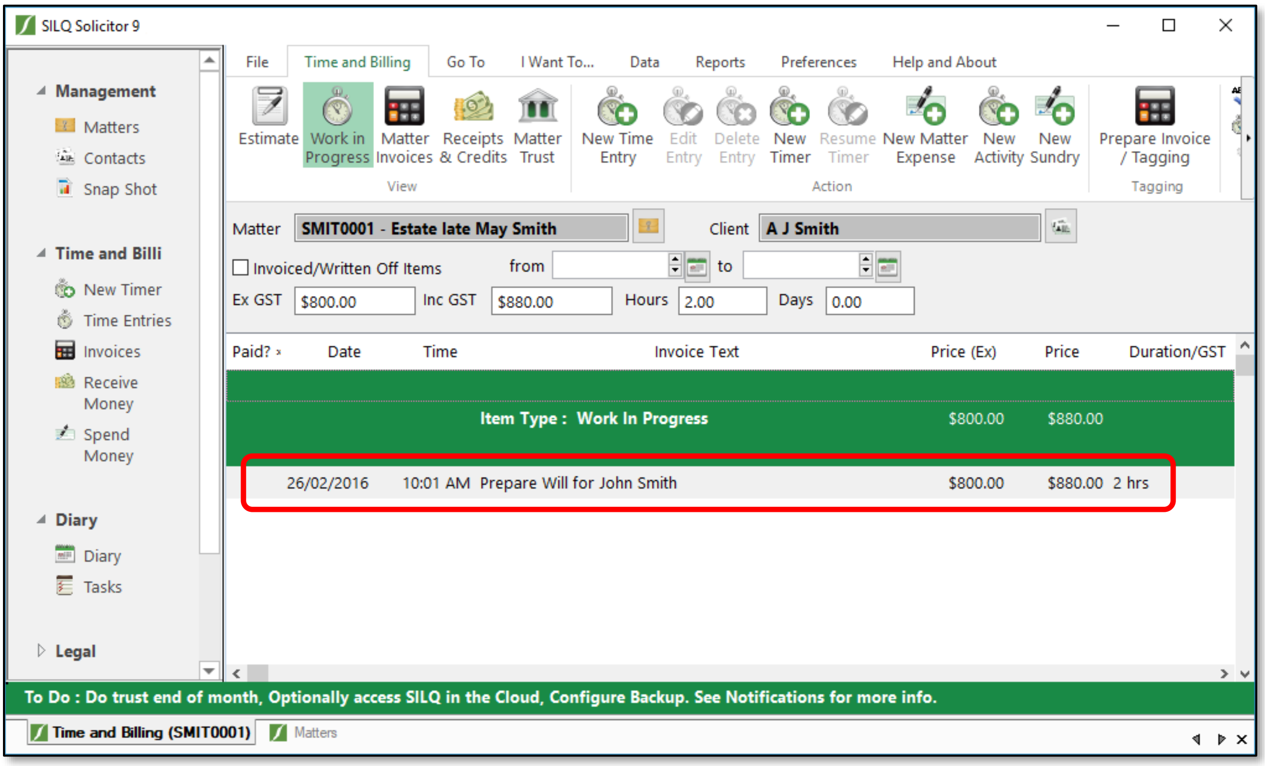
Next enter the duration, which will then automatically insert a charge based on the Fee earner rate against the matter.

The Invoice text field will display the subject line from the email. You can over write this by typing into the Invoice text field.

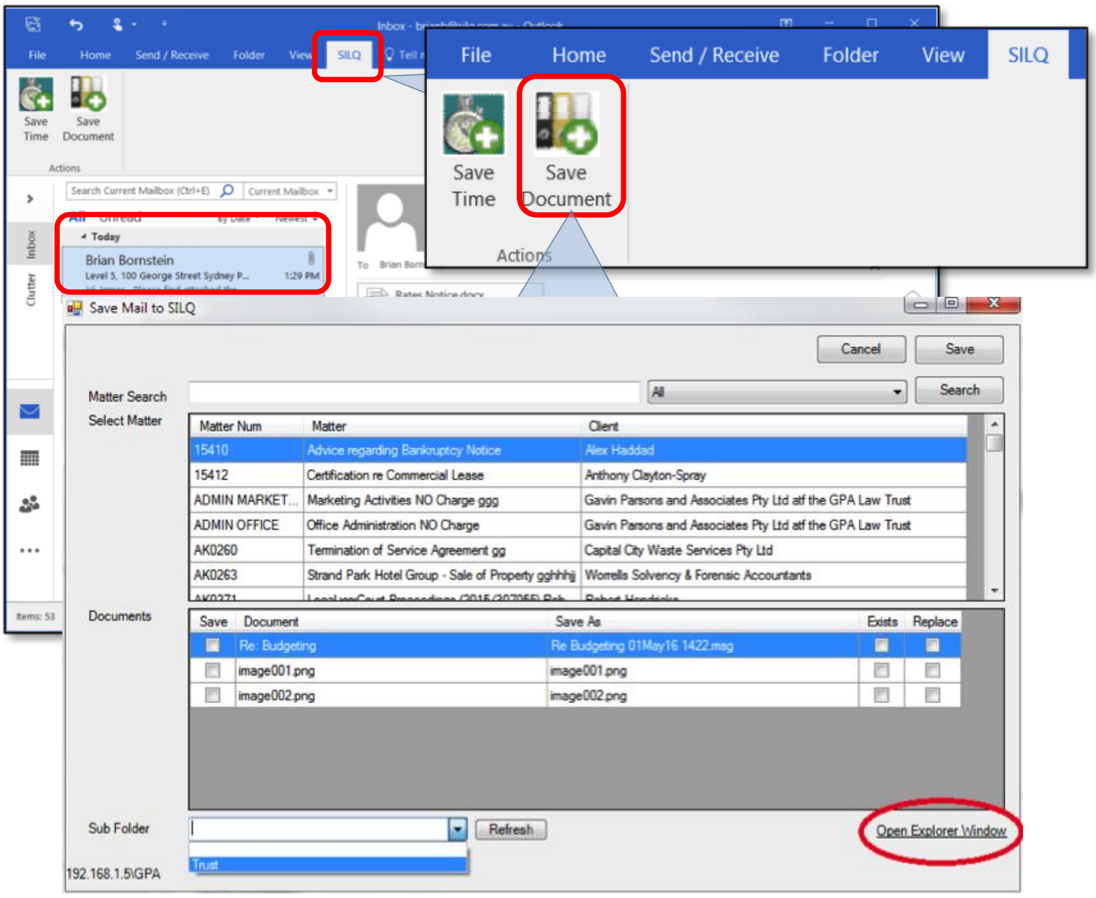
There is also a Notes field for you to record extra information about this time entry, but it will not display on the final generated invoice.

When all the fields have been filled in, click on the save button on the top right hand side of the Create SILQ Time Entry window.

This time entry will be recorded against the matter in SILQ as can be seen below.



10.2 Save a Document from Outlook



You can save an email or a document that is attached to an email in Outlook so it is saved to the clients matter folder on your server as well as it being recorded in the document register.

To save an email or a document, click on the SILQ tab on the top of the Outlook window. Two buttons will appear in the ribbon at the top of Outlook. **Save Time** and **Save Document.**

First click on the email that you want to save, and then click on the **Save Document** Button on the top ribbon.

The Save Mail to SILQ window will open up. A list of all your matters will appear in the middle of the window which you can scroll through to locate the matter you want to save and record the document against.
You can also perform a Matter search by either typing in the name of the matter in the Matter Search Field, and then from the Fee Earner drop down menu selecting **All,** which will search for matters against all fee earners and then click on the Search button.

You can also filter matters against a fee earner by just selecting the relevant fee earner from the drop down menu and then only the matters that have been assigned against that fee earner will display.

Lastly in the Filter by Contact field which displays the name of the contact from the selected email, you can place a tick in the tick box and only matters which have the contact assigned to it will be displayed in the select matter window.

Once you have located the matter to save a document against, click once on it to select it.

Then in the Documents section there will display a list containing both the email message and documents that are attached to the selected email.

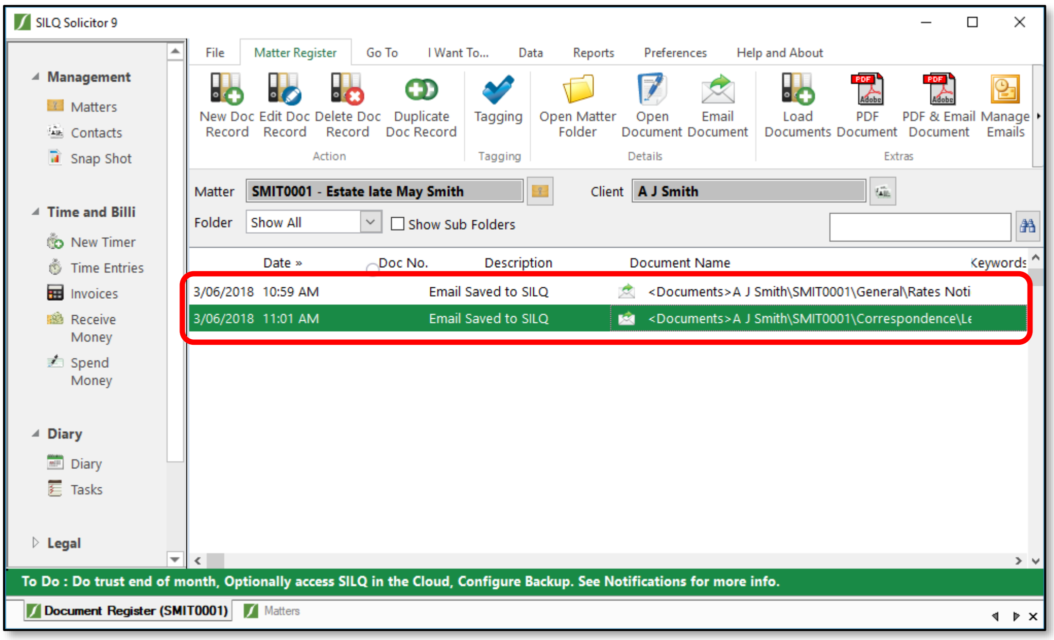
Place a tick in the tick box next to the email message and documents you want to save. To the right hand side of each document there is an **Exists** and **Replace** tickbox.

If the document already has been saved previously, the Exists tickbox will be ticked, and then you have the opportunity to click on the Replace tick box which will then over write the existing document with the new one.

When all the documents have been selected, click on the save button on the top right hand side of the Save Mail to SILQ window.

The documents that were selected will be saved into the clients matter folder on your server as well as against the document register for that matter.

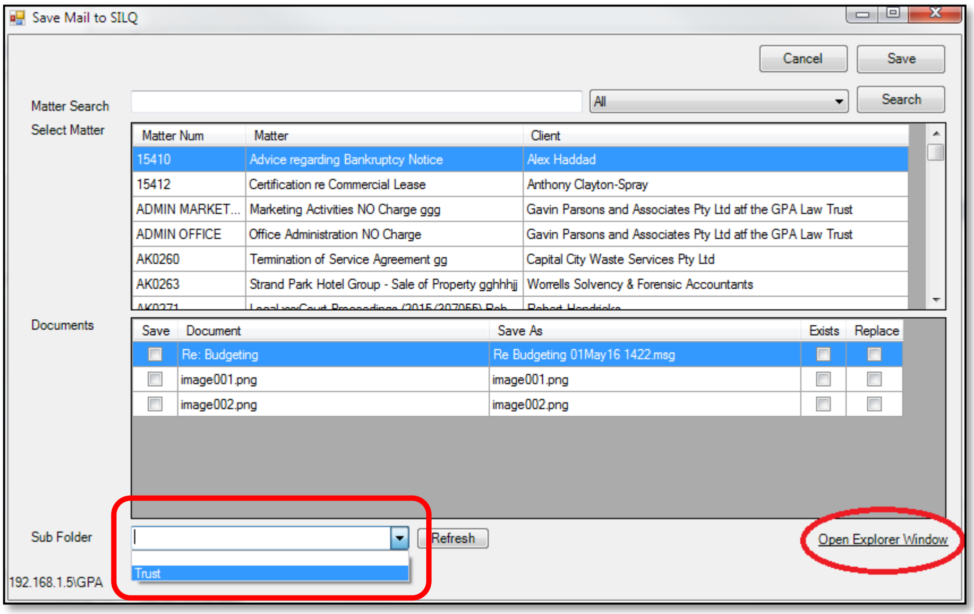
In the Document save option include details about being able to save to a sub folder and also the ability to open the matter folder.



10.3 Save a document to a sub folder and open the matter folder

You can save a document to a sub folder for that matter by clicking on the drop down menu on the bottom left-hand side of the Save Mail to SILQ window and selecting the sub folder.

If you want to open the matter folder directly from the Save Mail to SILQ Window, click on the Open Explorer Window link on the bottom right-hand side of the window.



10.4 Record time and save a document by right clicking

A short cut to recording time and saving a document is by right mouse clicking on an email message. Then from the dropdown either select ‘Save Document to SILQ’ or ‘Save to Time Entry SILQ’