Lexis® Front Office
powered by Time Matters® 9.0

LexisNexis®

White Paper

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Executive Summary

Lexis Front Office powered by Time Matters is used to track large volumes of information about matters. These matters are usually actual cases or projects for people or organizations outside of the firm (clients, opposing counsels, court reporters, etc.) An administrative matter can be set up to track internal firm information thus allowing for greater communication and reduction of overhead in administering internal information. This white paper gives ideas for types of internal administrative information that can be tracked in Front Office and walks through the creation of an administrative matter to do so. It highlights the *form style* feature of Front Office which allows custom screens to be designed for specific needs.

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Introduction

All law firms create large amounts of both internal and external administrative information. External administrative information is about external agents and actions such as names, addresses and telephone numbers for clients and vendors. Internal administrative information centers on internal agents or processes. Examples of internal information would be the addresses and telephone numbers for employees and lists of employee birthdays and telephone extensions. Users of Lexis Front Office powered by Time Matters often track only external information and overlook its internal information tracking aspects. The benefits of tracking internal administrative information in the centralized database of Front Office are manifold – improved efficiency, better communications, and reduced frustration.

Most offices use the inefficient "small pieces of paper" system for tracking internal information: a phone extension list near the telephone, a list of staff birthdays on the bulletin board, a list of employee telephone numbers next to the computer, etc. The problem of keeping all of these lists current arises when employees come and go. To track ongoing, date-sensitive information, administrative forms are used, tracking such things as vacation requests, sick time, time off, etc. These paper forms and request become cumbersome - especially in larger firms.

Having up-to-date centralized information at every employee's fingertips which is tracked over time is what Front Office does best. This also extends to internal information.

Front Office already tracks basic employee information on the staff list located under the menu **DATABASE ▶ STAFF**. Here employee addresses, telephone numbers as well as other information can be stored. There are six user-definable fields that can be set to track state bar numbers, names of spouses and other such information. The information here is limited, however and does not track time-based items such as time out of the office.

An administrative matter or even multiple matters can be used to track more varied data that is related to the internal administration of the firm.   Often Front Office is customized so that all dated records require the "Regarding line" to be filled in preventing end users from adding records without attaching them to matters. This can cause an issue, however, when items are added to Front Office that are not related to actual client cases. An administrative matter can also provide a place for such records to be attached.

Creating the Administrative Matter

The administrative matter is added like any other matter i.e. on the Front Office matter list. It acts as a central hub. A special Matter classification code such as "ADMN" should be added for all internal administrative matters. This code can be given a special color to set administrative matters apart from standard cases and projects. A form style can be set up to suppress all major fields except the memo or to customize specific fields for that type of administrative matter.

The Matter Reference should be something that clearly identifies what is being tracked. It is often useful to put a preceding asterisk or other such symbol in front of the Matter Reference so that it alphabetizes the administrative matter as the first matter on the list allowing users to rapidly locate it. This administrative matter gives a centralizing point for relationships to other record types. Supporting records can be used to track a myriad of different administrative data. Without a central point to attach these records, supporting records would be cumbersome to administer.   The relative ease of administration increases the communication internally and allows users to work synergistically. If less time is spent maintaining or looking up firm internal data, more time can be spent on client-related matters.

> *Feature Spotlight: Form Styles*
> *Form Styles allow each classification code to change the layout of the form. Fields can be customized to track specific information or whole sections can be suppressed to give a more clean appearance to the form. More about form styles can be found in the Time Matter manuals or help menu.*

Example:

Below is and example of an administrative matter named "*ADMIN – Vacation/Out of Office." The matter form for the "ADMN" code has been customized to remove all unneeded fields. Also a custom form tab has been created to show Events related to this matter.
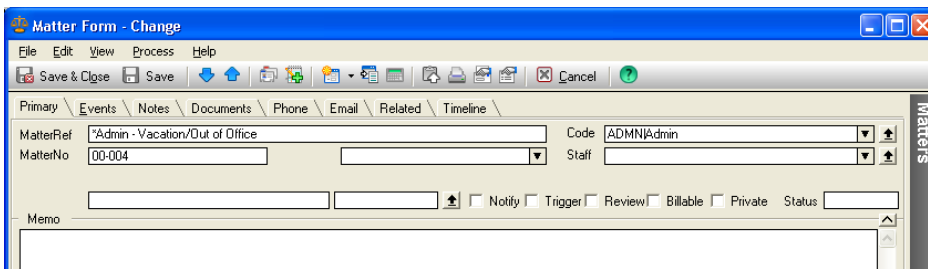

When a user clicks on the Events Tab they get a breakdown of the various Events related to this administrative matter. In this instance there are special Event codes for different reason to be away from the office.

There can also be customized Phone record codes for tracking sick call-ins and customized Email records for employees reporting in sick via email.

In this example the administrative matter works as a centralizing hub where all information about employee absence is attached allowing management to go to one place the find information about attendance instead of shuffling through many different request forms and tracking slips. The security and audit log of Front Office ensures data veracity.
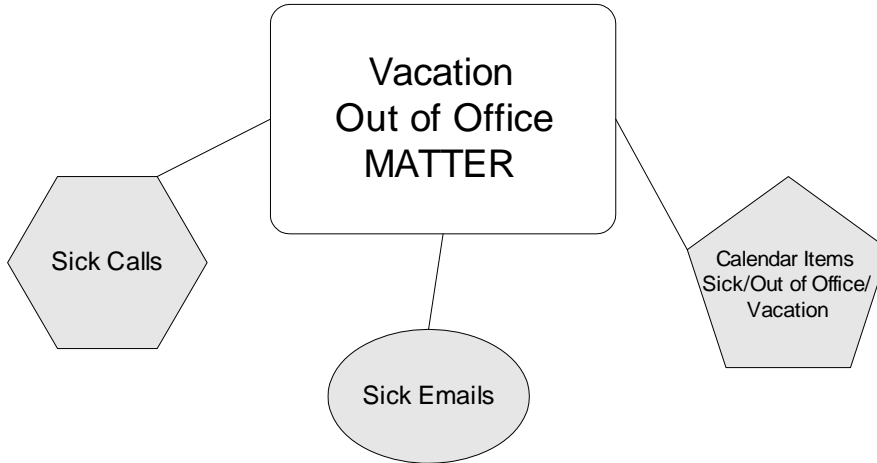
Getting Summarized Information

Looking at lists of records related to attendance is good but getting concrete numbers is even better. Using the Sub-list Summary area can greatly enhance the information gleaned from the records.

Feature Spotlight: Sub-List Summary Area
On the sub-list of a matter, an additional area can be made visible which summarizes information about the records on the sub-list. To activate this area, go to the sub-list and click on **VIEW** ▸ **SUMMARY AREA**. *The list properties button can be used to select which fields to summarize.*

When the summary area is turned on, one can see numbers such as how many records are in the list and the cumulative duration.

Records: 13		Duration: 93.00				

Date		Time/Dur	Staff	Description	App By	Duration
9/11/2007	Tue	9:00AM	ASM	School Recital	RSB	3.00
8/13/2007	Mon	9:00AM	ASM	Doctor's Appointment	DB	2.00
8/13/2007	Mon	9:00AM	BEA	Out Sick - Flu	RSJ	8.00
6/10/2007	Sun	9:00AM	AAH	Hawaii	RSB	8.00
6/09/2007	Sat	9:00AM	AAH	Hawaii	RSB	8.00

(tabs: All | Out of Offc | Sick Time | Vacation)

If only the "Out of Office" code tab were selected, the summary information would focus just on the records on that tab.

One could also use the Select button to filter the list to just one staff member or just a specified date range, The summary information would recalculate for just the records shown.

Appendix A: Sample Ideas

Administrative Matters

- *Admin - General Admin
- *Admin - Client Development
- *Admin - Continuing Legal Education
- *Admin - Vacation / Out of Office
- *Admin - Employee Personal
- *Admin – Pending Matters

Records Attached to the Administrative Matter

Events

- Internal business meetings
- Holiday parties
- Employee vacation and sick time
- CLE time
- Client Development Luncheons
- Employee personal events

To Do's

- Staff birthdays (use a special classification code for birthdays)
- Reminders to buy cyclical items (refill toner cartridges, paper towels, etc.)
- Payroll and tax deadlines
- Rent payment reminders

Notes

- Staff birthday list (if not tracking this under To Do's)
- Staff emergency contacts list
- Staff telephone extensions
- Holiday schedule for the firm
- Numbers of people to call in case of building maintenance emergencies

Phone Calls

- Track calls from employees when they call in sick
- Track call to building manager for maintenance issues

E-mail

- E-mail orders for office supplies (could also be attached to the vendor's contact record)
- E-mail order / delivery confirmations
- Correspondence with employees re: firm matters (vacations, days off, etc.)

Billing

- Track reimbursable expenses for staff

Documents

- Employee forms for vacation and time-off request
- Employee handbook