



# Open Practice

Builds a Better Practice

## WORKFLOW MANAGEMENT

Save time and money – automate processes and procedures.

- Standardise processes in all areas of your practice
- Schedule effectively
- Set reminder “triggers” for all matters
- Communicate with clients and staff electronically and effectively
- Save on staff training costs
- Automatically monitor and allocate work
- Keep clients up to date on the status of their matters automatically.

Leading practitioners appreciate the benefits of automated work processes and procedures. Storing and automating knowledge allows them to spend more time on high value chargeable work and less time on administrative routines.

Service quality standards are preserved, practice risks reduced and consistency maintained through new delegation capabilities.

Open Practice Workflow completely integrates your case management, time recording, billing and document

production in a single working environment.

Most practices retain hard copy checklists for different types of transactions (eg sale / purchase conveyance, Workcover, mortgage). These checklists are then used by new lawyers and administrative staff to learn a particular process.

Open Practice Workflow is an intelligent electronic checklist that reminds you of deadlines, knows which documents to produce in sequence and notifies the person responsible of the status of the file.

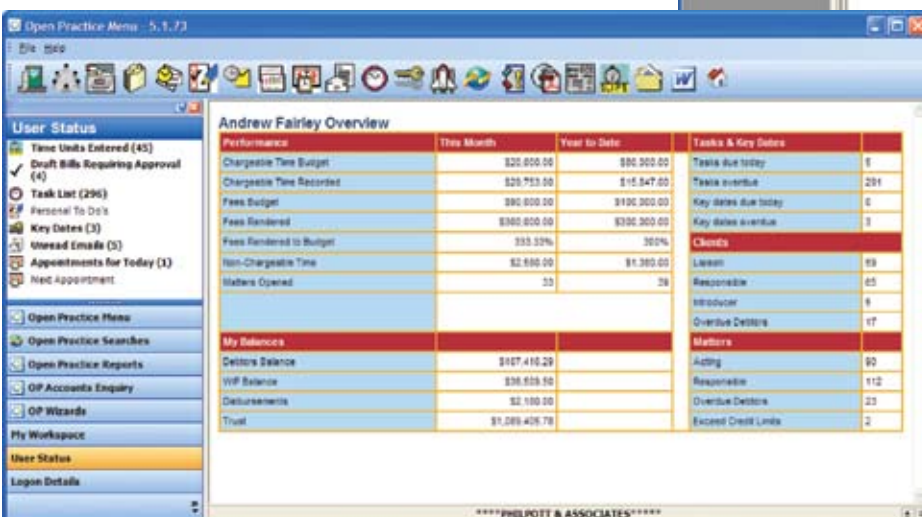
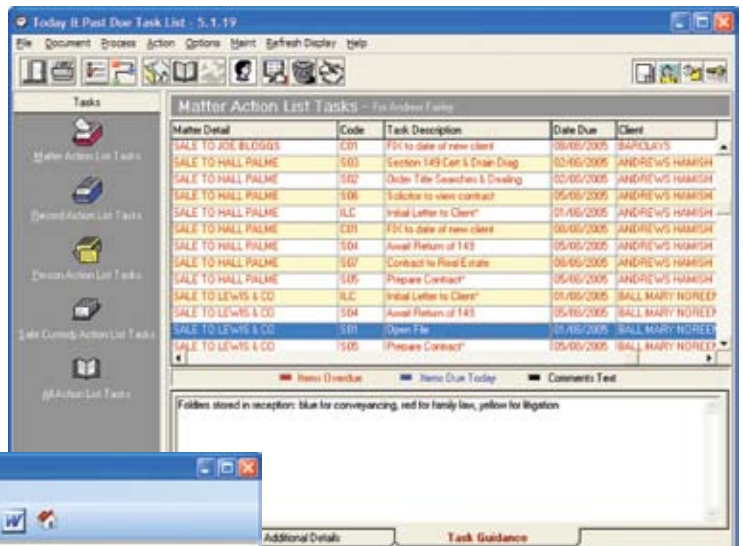
### Action lists and tasks

Standard case procedures are recorded and stored in action lists made up of tasks (similar format to the to-do list). Each action list is carefully designed to achieve the best timing for the particular type of matter and flow comfortably to completion.



Action lists may be created to meet the specific requirements of a particular area of law, or of a particular client. They may also be used to ensure that your standard office procedures such as file openings and closings are consistently and effectively applied.

Key dates ensure timely file reviews, warn on critical deadlines for matters



subject to statutory limitations, and any other crucial dates such as property settlements and court filing requirements.

Tasks may involve a particular activity and may include the production of one or more specified documents.

An action list may be linked to another action list to provide a standard guide of instructions for the “next stage” of the matter as it progresses.

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Tasks may be inserted and deleted at any time into the "growing" action list and follow up and action dates are recalculated on demand, to ensure the matter flows within time requirements.

### Record time and measure against budget

Budgets may be set for tasks and then linked to the actual time expended on a particular task. This allows the actual cost of doing business to be recorded. In the integrated Open Practice environment, movement between workflow tools and time recording is easy and immediate.

### Schedule effectively

Scheduled tasks appear on the to-do list of the responsible person. Reminders automatically "pop up", dramatically reducing the need to rely on memory.

A task can also automatically activate email when it becomes overdue – an effective safety mechanism for critical actions. Designated staff responsible for a client file can automatically be monitored and when unavailable (eg, on leave) tasks can be re-allocated to another person.

People involved in matters may be organised into teams. Matters can be allocated to teams and moved from one

team to another. Individual tasks can of course also be re-allocated adhoc, and a series of standard reports assists the matter supervisor to monitor matter progress as well as financial progress against budget.

### Personalise your database: database extensions

Matters for clients in different areas of law require different information to be stored. With database extensions you can create your own databases of information to assist with day-to-day matter management and client reporting.

Regular use of information in the databases ensures ongoing accuracy. Information in the databases is also used for generating reports and is optionally available for merging into documents.

### Guide and train "on the job"

Each task may include on-line guidance. The guidance is similar to a notes area and is used to enter simple instructions for example, from where stationery is stored to detailed instructions of the procedure to be followed to file documents in a particular court.

By linking documents to tasks staff receive automatic guidance and training on the correct documents to be used. Operators are guided and trained by the system while still working with risk-managed efficiency. Linking tasks to documents further reduces training needs.



### Monitor progress and performance

Because Open Practice operates in real time, the progress of matters and performance of individuals and teams are easily monitored.

The matter to-do list allows matter managers to easily identify overdue and incomplete tasks and pro-actively organise assistance.

### Report to clients

Practices with corporate clients face increasing pressure to meet performance benchmarks. This requires efficient and effective reporting.

All information in Open Practice, including the information in your personalised database extensions, may be used for reporting. Workflow automation will ensure that you have all the information needed by your client, when the client needs it, instantly securing your key client relationships and providing a powerful competitive advantage when tendering.

Crystal Reports is recommended for report writing, but information can be extracted with many industry standard reporting tools.

