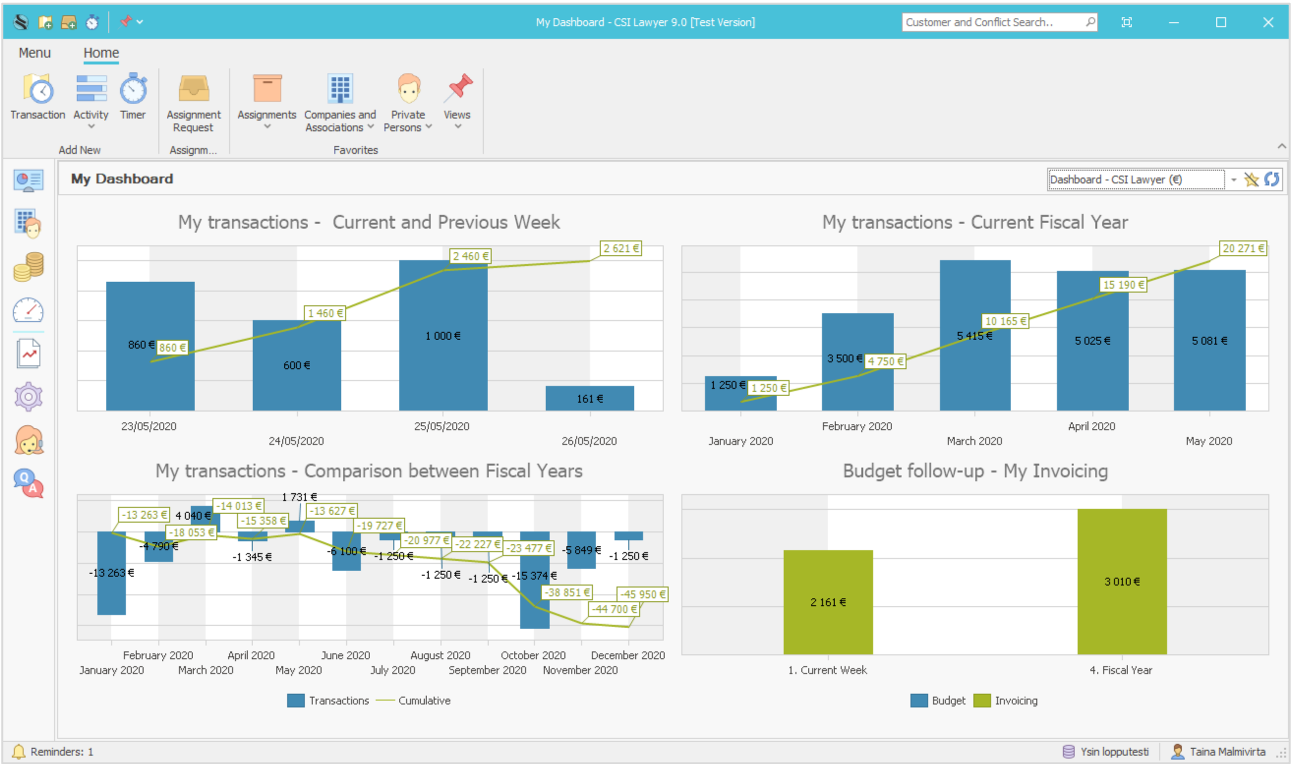
CSI LAWYER V.9.1
RENEWED USER INTERFACE

CONTENT

KEY CHANGES OF THE USER INTERFACE

The CSI Lawyer version 9.1 has a new user interface.



The primary objective of the changes has been to clarify the software and to make it faster to use. There is also a new CSI theme and new, more illustrative action icons. We are aware of the fact that the new user interface may be challenging for customers who have got used to the former user interface. We apologize for the inconvenience, ask for patience and are prepared to guide you until you get familiar with the new user interface.

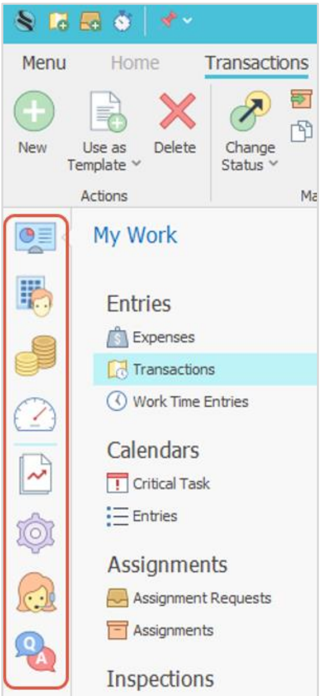
The key changes are the following:

- In the main window, the task areas and folders have been reorganized as more logic groups. We have also centralized e.g. all customer data into one folder only instead of having multiple customer folders under task areas.
- The folder structure of other windows has also been reorganized. The customer and assignment windows, having plenty of folders, have new groups under which folders are organized.
- Layout of most windows has also minor improvements.
- All actions for managing lists and windows are now visible on the ribbon, making them easier to use. The commonly used actions are always found in the same order.
- The number or predefined views has been reduced, and there are new filters enabling versatile filtering of data. The search field is now found on its own row.
- To improve the system usability, we have added:
  - New buttons enabling quick search of information and creation of new records

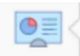
- Customer and Conflict Search field in the top bar to find customers and make conflict search quickly.
- Possibility to add new records (assignments, transactions) directly from the tree structure by right-clicking the mouse.
- Possibility to hide the folder structure when working on a small screen and needing more space for the data.
- New search function in the parameter windows, making it easier to find a specific parameter.
- A confirmation window, preventing unintentional closing of the system.

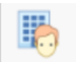
REORGANIZED TASK AREAS

The task areas and tree structures have been reorganized and folders regrouped to offer more logic sets of functionalities.



The task areas, located earlier under the tree structure, have now been moved to the left side of the window:

 **Workplace** still offers the functionality a regular user needs in the daily work. **NOTE!** Assignments have also been moved to this task area.

 **Customers** covers customers, conflict checks, and the functionality related to sales and marketing.

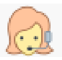
 **Financial Management** still offers all invoicing related folders and other functionality required by persons responsible for financial management tasks.

 **Settings** is the task area only available for power users for defining the desired way to use the system and managing e.g. invoice and payment demand templates and reports to be used.

As new task areas we have added:

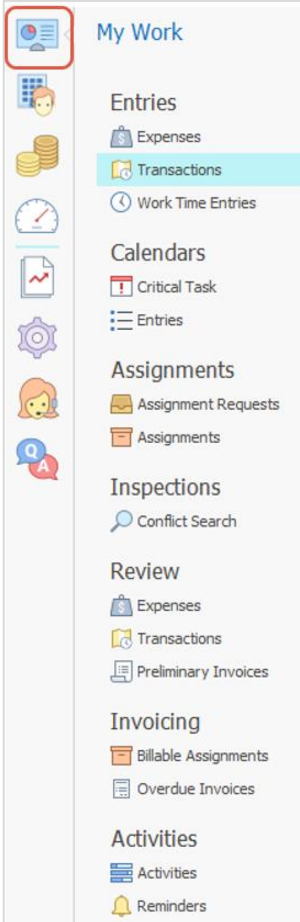
 **Dashboard,** information about a user group's key measures as illustrative charts (if defined).

 **Reports,** all traditional and pivot reports.

 **CSI Extranet**, offering the support request form, user guides and actual information e.g. of maintenance breaks of the system.

 **Help**, taking you directly to user instructions in the CSI Extranet.

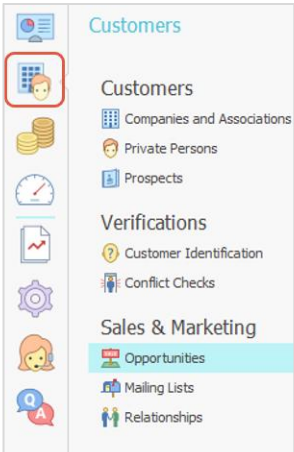
WORKPLACE TASK AREA



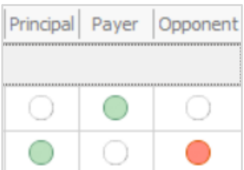
The Workplace task area shows primarily information related to a user's own work. The key changes in its folders are the following:

- The **Entries** group now contains expenses, transactions, and work time entries.
- Critical tasks and calendar format entries are found in the **Calendars** group.
- **Assignments,** also containing assignment requests, has been moved to the Workplace.
- **Inspections** enables you to make a quick conflict search for a customer, to look at the customer's assignments or to make a conflict check to be saved in the customer information.
- The **Review** group offers Expenses and Transactions folders where users can review their own entries and mark them reviewed even before a preliminary invoice has been created.
- After a preliminary invoice is created, the Review > **Preliminary Invoices** folder displays all preliminary invoices which the user should review.
- **Invoicing** contains:
  - Billable Assignments where a user has a responsibility role, and which have uninvoiced entries
  - Overdue invoices where a user has a responsibility role
- **Activities** covers a user's activities and any reminders.

CUSTOMERS TASK AREA



- Earlier each task area had its own Customers folder but depending on the task area they displayed either all customers, principals only or payers only. To add clarity, all customer information has now been collected to the Customers task area. The role of a customer is indicated in principal/payer/opponent columns added e.g. to the Active Companies and Associations view.

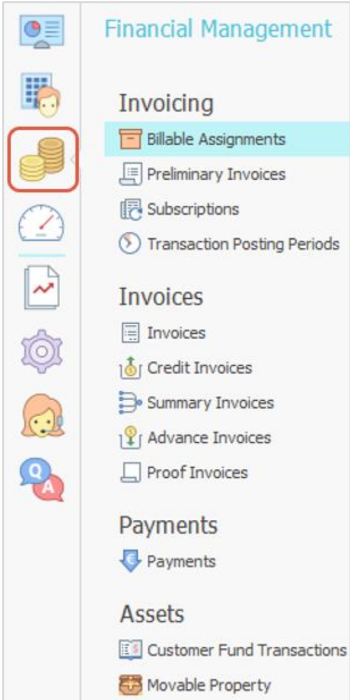


- The **Customers** group covers folders for corporate customers, private customers, and prospects.
- The **Inspections** group offers access to all customer identifications and conflict checks made by the office.
- Different party roles are now marked with colors; co-parties are indicated with green, opponents with red, and other parties with grey.
- The **Sales & Marketing** group enables viewing all opportunities, mailing lists and customer relationships saved to the system.

CSI Helsinki Oy
Vilhonvuorenkatu 11 C
FI-00500 Helsinki

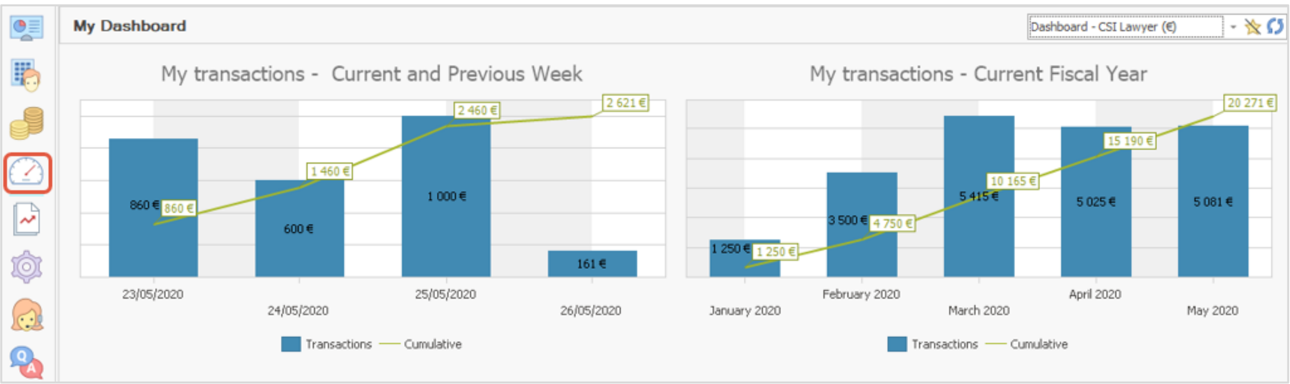
+358 10 322 7880
support@csihelsinki.zendesk.com
www.csihelsinki.fi

FINANCIAL MANAGEMENT TASK AREA

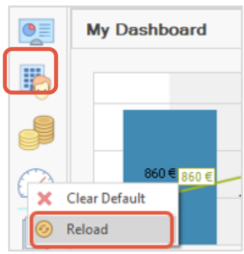


- As earlier, the Financial Management task area serves users who are responsible for invoicing, payment management, and other financial management tasks.
- The **Invoicing** group has been added to make invoicing process easier. It covers:
  - Billable assignments, having entries of which it is possible to create preliminary invoices
  - Preliminary invoices of which it is possible to create invoices
  - Subscriptions of which it is possible to create the next subscription fees
  - User-based transaction posting periods which may occasionally require modifications.
- The **Invoices** group covers all different invoices in their own folders.
- **Payments** are now a separate group.
- The **Assets** group is the same as earlier.
- The Financial Management task area no longer covers:
  - Reports, which are now a separate task area.
  - The Payers group; corporate and private customers having a payer role. Customers are only found in the Customers task area.

DASHBOARD TASK AREA



Dashboard charts defined for different user groups are now a separate task area, enabling users to easily check the status of their key figures.

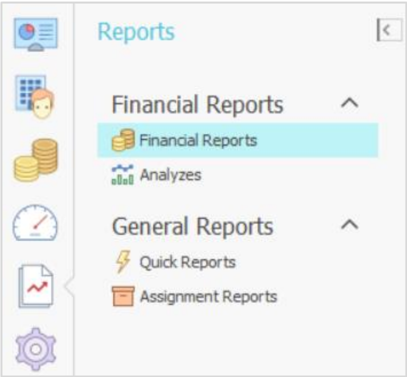


When you import new dashboard charts, you can make them visible in the dashboard by refreshing the dashboard task area as follows:

- Hover the cursor over the Dashboard task area icon.
- Right-click the mouse and select Reload.

REPORTS TASK AREA

The Reports task area now contains all reports and pivot formerly found in the Workplace and Financial Management task areas.



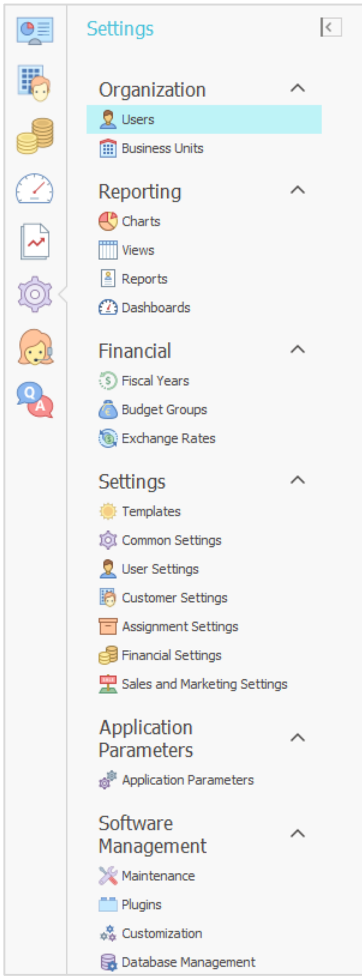
The Financial Reports available mainly for the financial management team.

- Financial reports cover basic financial management reports.
- Analysis are pivot reports enabling a more detailed analysis of figures.

General reports cover reports which earlier were available for all users in the Workforce task area, related either to a user's personal work or work of a user's team.

- Quick reports serve normal users and team managers.
- Assignment reports offer different assignment lists.

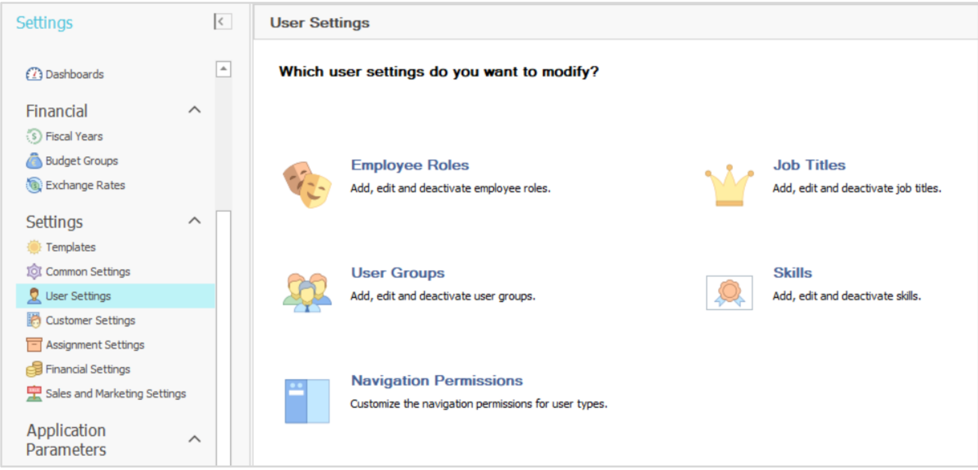
SETTINGS TASK AREA



A tree structure has been added to the main window of the Settings.

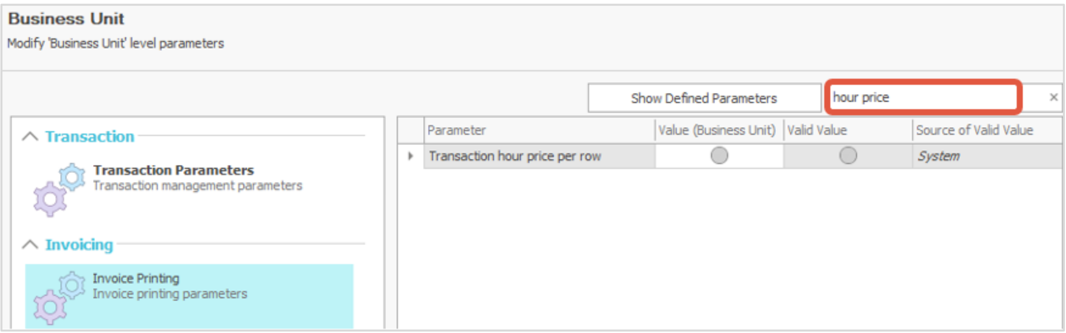
- **Organization** covers all system users and the business units added to the system.
- **Reporting** offers in separate folders reports, views, dashboards and charts which earlier were collected into one list only. This makes it easier to find different types of reports when you have to edit them.
- **Financial** covers fiscal years, budget groups and exchange rates added to the system.
- **Settings** contains many basic but crucial system parameters:
  - In Templates you can manage templates for e.g. documents, emails, invoices and reminders.
  - In Common Settings you can manage e.g. languages, units, countries, number sequence codes as well as transaction, expense and activity types
  - Basic settings regarding users, customers, assignments and financial management are also managed in this group.
- **Application Parameters** enables defining parameters at the system, business unit and user level.
- **Software Management** covers version updates, management of plugins, customizations as well as database management.

Other windows in the Settings are still in the same format as earlier . E.g. the User Settings folder opens as follows:



In case your company has more than one business unit, in the Settings there is now a button which enables power users to view parameters of their own business unit only (Settings > Parameters > Own Business Unit Parameters).

The parameter window now offers a Search field, making it easier to find the needed parameter. You can search with the name of the parameter, parameter group or its description, or with a part of it. The system lists all parameter groups matching with the search criteria. By selecting a group, you can see if the group contains the parameter you are looking for.



The **Show Defined Parameters** button enables filtering from the parameter list only those parameters which have a defined value. **NOTE!** If the parameter value is in a text format, and if there has once been a value in the field, the system assumes that the field still has a value and displays it, too. You can return to the whole list of parameters by re-clicking the button.

CSI EXTRANET AND HELP TASK AREAS

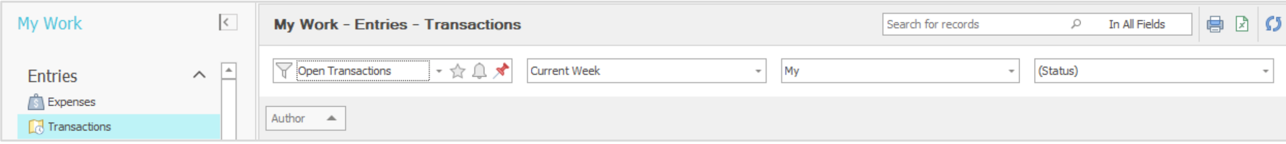
The CSI Extranet task area opens the CSI extranet site, offering e.g. the support request form, user instructions and actual news about system maintenance breaks etc.

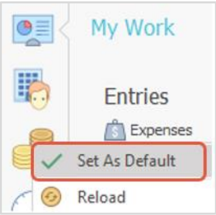
Help opens the instructions page directly.

The language of the pages is defined based on the user interface language of a user, but the other language versions are also available when clicking other languages from the top right corner.

DEFINING A DEFAULT TASK AREA

By default, the system opens the Workplace task area, Transactions folder, where the default view is My Open Transactions from the current week.





A user can define any task area as a default by right clicking the mouse over the task area icon and then selecting Set as Default. The default task area will then be displayed underlined.

You can remove the default by right clicking the mouse on top of the icon again and selecting Clear Default. You can also cancel an earlier selection by selecting another task area as a default.

Similarly, inside each task area you can define a default folder by right clicking the mouse on top of the folder and selecting Set as Default.

NAVIGATION RIGHTS

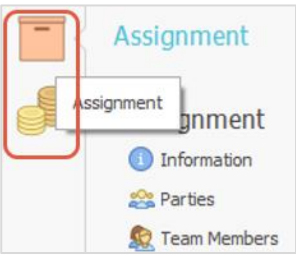
There are some changes in the navigation rights of different user types. Specific folders in the tree structures have been replaced with new ones.

Most changes apply to the Assistant user type who, by default, no longer has access to the Expenses, Work Time Entries, Entries (former Calendar) and Reports folders. If required, power users can edit navigation rights in the Settings > Business Unit Settings > User Settings > Navigation Rights.

REORGANIZED WINDOWS

CUSTOMER AND ASSIGNMENT FOLDER GROUPS

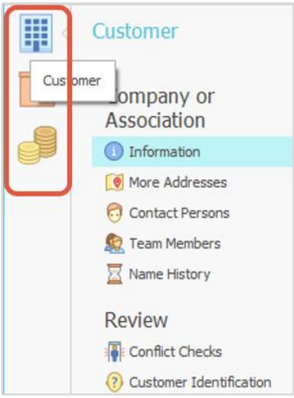
In the left side of the folder structure customer and assignment windows now have groups to organize multiple folders of these windows. You can view the group name by hovering the mouse cursor over the group icon. E.g. in the assignment window:



 The Assignment group displays all folders containing the assignment's basic information, entries, documents, sub-assignments, and activities.

 The Invoicing group contains all folders related to pricing, budgets, invoicing, invoices and assets.

The customer window (of corporate and private customers) has three groups:



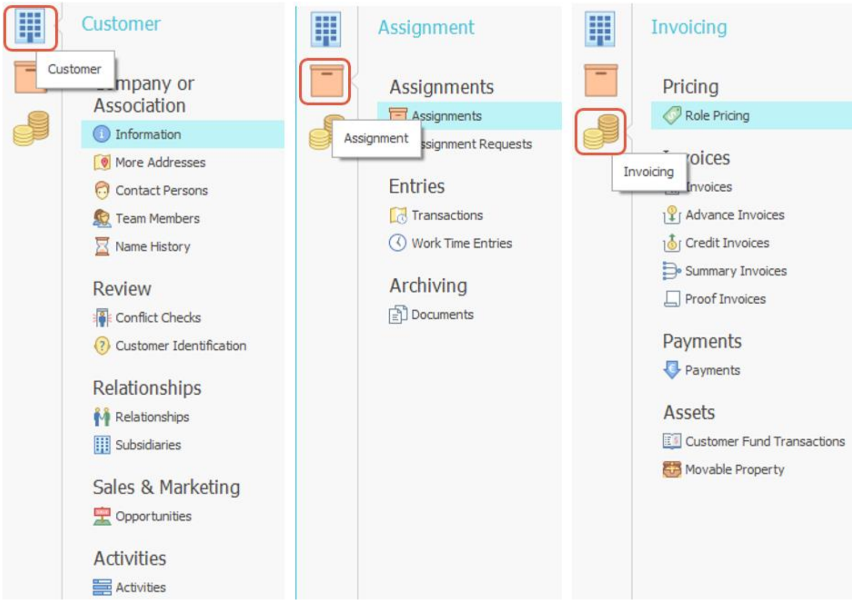
The Customer group contains all folders related to a customer's basic information, contact persons, conflict checks, customer identifications, relationships, opportunities, and activities.

The Assignment group covers all folders related to a customer's assignments, assignment requests, transactions, activities, and documents.

The Invoicing group offers all folders related to the customer's pricing, invoices, payments, and assets.

FOLDER GROUPING IN CUSTOMER AND ASSIGNMENT WINDOWS

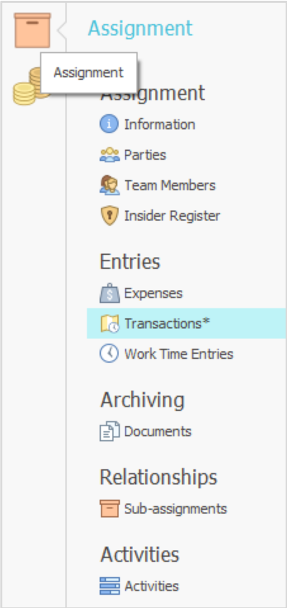
Folders of each window have been reorganized. The folders of the customer window are found in the customer, assignment, and invoicing groups:

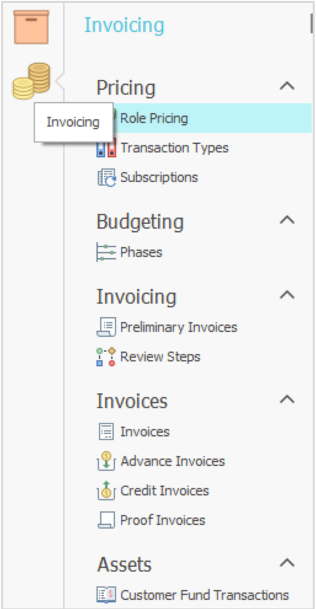


When working with folders of the customer window, please note that all these folders (entries, activities, invoices) **display customer-level data regardless the assignment**. E.g. the Transactions folder lists transactions registered to any assignment of the customer. To view only transactions registered in a particular assignment open first the assignment in the customer's Assignments folder and then its Transactions folder.

The system requires you to make an identification for each assignment, but all identifications are still stored in the Customer Identification folder of a customer. Opportunities have now been moved to the Sales & Marketing folder of the customer window.

The folders of the assignment window are found in the Assignment and Invoicing groups.





MANAGEMENT OF WINDOWS

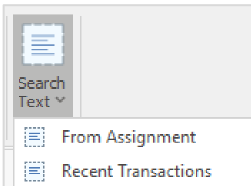
In earlier system versions, all windows opened by the customer have remained as open tabs. In the new version, the system remembers earlier searches and view filtering in different folders when you visit another folder and then return to the earlier folder again. In case you wish to refresh your searches and views, hover the cursor over the task area icon, right-click the mouse and select Reload.

You can still open multiple system windows simultaneously. You can e.g. start entering a new transaction and, to see what you have written as another transaction's description, open also a window of an existing transaction from the customer or assignment window.

WINDOW-BASED CHANGES

In most windows, there are minor changes regarding the window layout and grouping of fields. Some windows have also got changes to their fields and actions, e.g.

- From the **Activity window**, the Completed, Skills and Transaction type fields have been removed when the activity type is a task.
- To the **Assignment window**, a checkbox has been added for a DAC6 directive, and the assignment description which earlier was a separate tab, has now been added as a field to the Invoicing tab.
- To the **Transaction window,** an Assignment currency field has been added. The ribbon now offers a new action Search Text > From Assignment/Recent Transaction, which enables you to quickly copy a transaction text either from another transaction of the assignment of from any of your most recent transactions regardless the assignment.



FILTERING DATA IN VIEWS

VIEW SELECTION AND FILTERS

The number of view options has been reduced as the new filters enable versatile filtering of data. The filter fields have also been reorganized, and the Search field is now located above the filtering row.

The idea behind the reorganization is that a user can find the desired data by selecting the view and then adding filters as follows:

1. Go e.g. to the Assignments folder and select a suitable view. The default is Active Assignments.

2. Filter the search by selecting the Date, e.g. Current week.
3. The default value of the Owner filter is “My”; the system displays data which is regarded as the user’s own.
   - You can also choose options My Business Unit to see your business unit’s assignments, or Other Business Units to see assignments of other business units in case your company has multiple business units.
   - If you wish, you can also remove the Owner filter by selecting × in the end of the field. The system then displays all assignment regardless their owner.
4. You can add other filters, e.g. look for particular types of assignments only.
5. If needed, you can lock the filters by selecting and enter a search criteria to the Search for records field.

   NOTE! If you already know precise search criteria for finding the assignment, you can naturally skip all the former steps and use the search directly.

Based on your filters, the system displays the search results. Some views may contain a predefined filter, e.g. date or author.

button freezes the view selection and all active filters, enabling you to use text search to find the desired information.

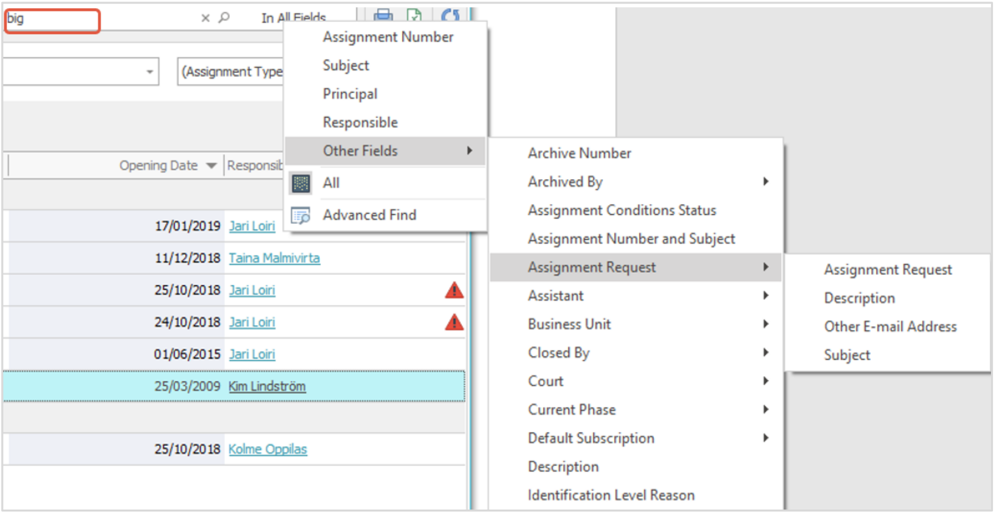
If you wish, you can save the selected filters as your personal favorites by selecting . You can also pin them with the button to your Views menu (on the top bar), enabling you to open the commonly used views very quickly.

NOTE! If your favorite view disappeared or changed when updating the new version, power users can edit the views or add new ones in the Settings > Reports window. Check the FAQs in CSI’s extranet or contact CSI for further advice.

SEARCH ACTION COMBINED WITH VIEW SELECTION AND FILTERS

When opening a folder, if you already know the search criteria for finding the desired information, you can skip the view selection and filters:

1. Enter the search criteria directly to the Search field.
2. If you wish the search criteria to cover all columns in the view (e.g. in the Assignments folder assignment number, subject, principal, date), just select Enter.
3. However, if you wish to apply the search criteria to a particular field only, enter the search criteria and then click the In All Fields button.
4. The system opens a long list of available fields for selecting the one to which you wish to apply the search.



5. If your search results as a very long list, you can still use the view selection and filters to see a more limited number of results.

”MY” FILTER IN DIFFERENT LISTS

The ”My” filter added to lists displays only records which are regarded as belonging to the user. The ownership is checked from specific fields and the records displayed accordingly:

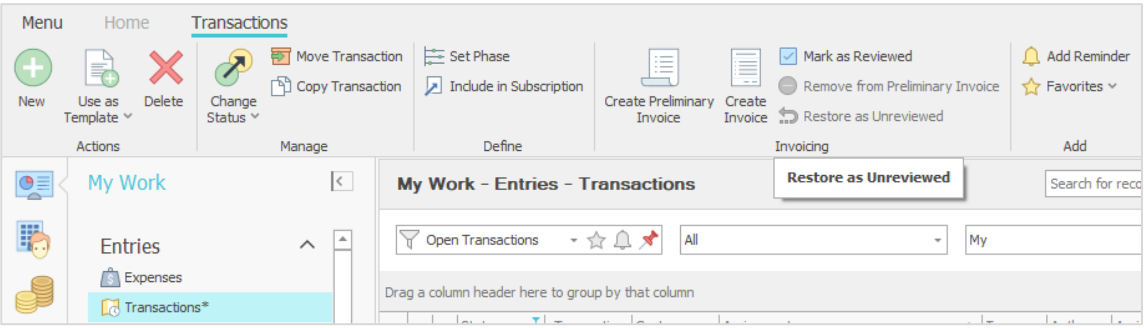
- **Activities:** the system displays activities where a user is the responsible for the activity
- **Assignment requests:** the system displays assignment requests where a user is either the assignment request owner, responsible or assistant
- **Private persons/Companies:** the system displays private persons, companies and associations where a user is the customer responsible
- **Customer identifications**: the system displays identifications where a user is the responsible person
- **Conflict checks**: the system displays conflict checks where a user is the responsible
- **Assignments:** the system displays assignments where a user is either the assignment owner, responsible or assistant
- **Invoices:** the system displays invoices of assignments where a user is either the assignment owner or invoicing contact

- **Workplace > Invoicing > Overdue invoices**: the system displays overdue invoices where a user is either the assignment owner, responsible or invoicing contact
- **Workplace > Invoicing > Billable Assignments:** the system displays billable assignments where a user is either the assignment owner, responsible or invoicing contact
- **Preliminary invoices > Open Preliminary Invoices:** the system displays open preliminary invoices where the user has been added to the Assigned to field
- **Preliminary invoices > Preliminary Invoices in Queue:** the system displays preliminary invoices whose Assigned to field is empty
- **Preliminary invoices > Tracked Preliminary Invoices:** the system displays preliminary invoices where a user is either the assignment owner, responsible or invoicing contact
- **Proof invoices:** the system displays proof invoices where a user is either the assignment owner or invoicing contact.

RIBBON ACTIONS

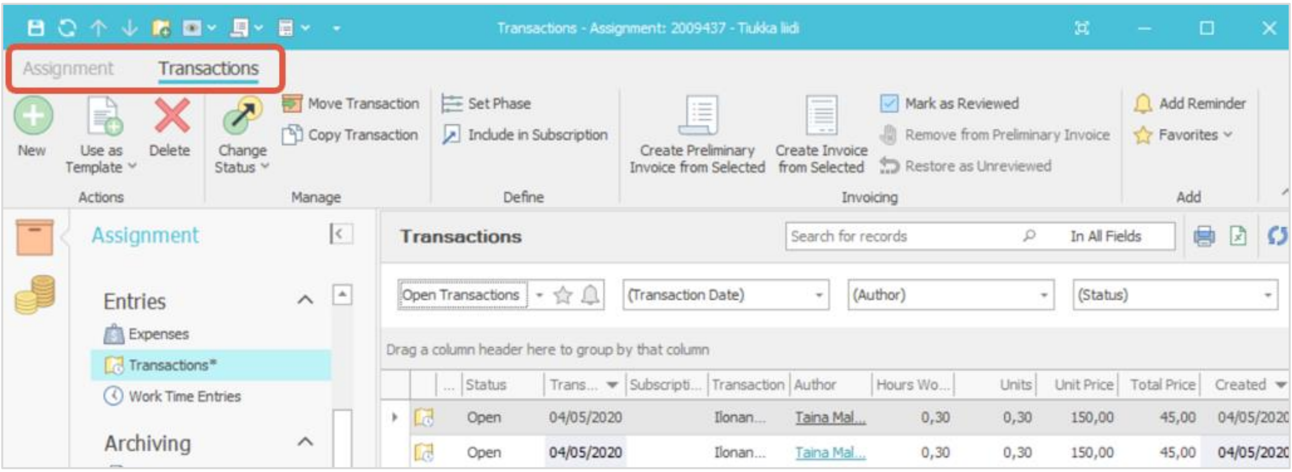
The actions required to manage the data in lists and windows have earlier been ”hidden” behind the Actions button. Now the actions are available directly on the ribbons, and their icons are more illustrative than earlier. In some windows, there used to be two separate ribbons which have now been combined.

The ribbon content changes window by window. However, the commonly used actions can always be found in the same order.



In lists, most of the actions are available also by hovering the cursor over the desired row and then right-clicking the mouse to open the Actions menu.

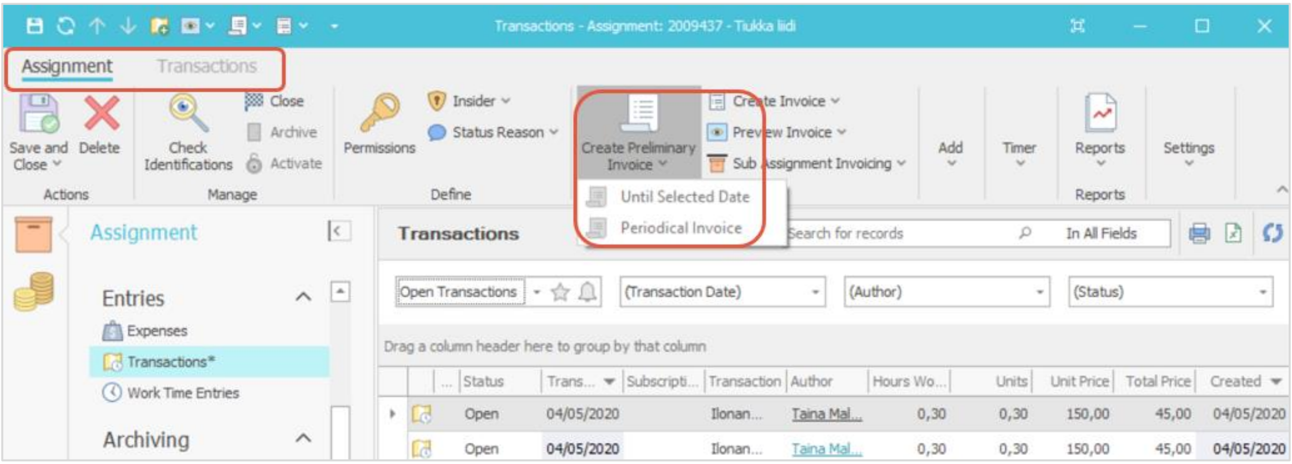
NOTE! The ribbon in each window only contains the actions allowed for the window or folder in question, meaning that e.g. the ribbon of the assignment window is different from the ribbon of its Transactions folder. Using the buttons above the ribbon, you can easily change the ribbon from the folder level (Transactions) to the actual Assignment window. The ribbon selected is bolded.



This is particularly important to note when you are in the Transactions folder of an assignment and wish to create an invoice. The Transactions button is thus displayed bolded as in the picture above, and you have in your use the ribbon of the Transactions folder. **When you now select the Create Invoice button, it only applies to the selected transaction rows, not the whole assignment.** This button does not either offer to you the familiar Until Selected Date / Periodical Invoice options.

In case you wish to create an invoice of the **whole** assignment:

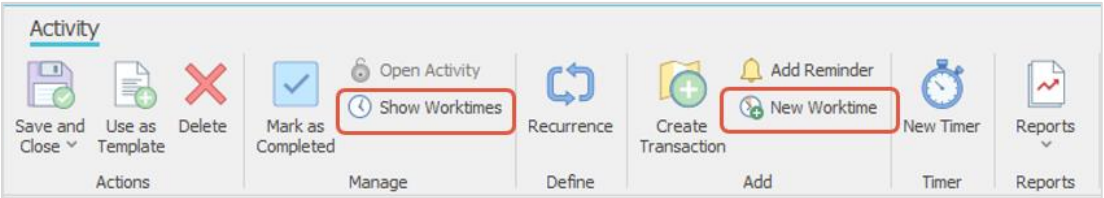
1. Select the Assignment button displayed on top of the ribbon.
2. The ribbon of the assignment appears, but the transaction list remains visible.



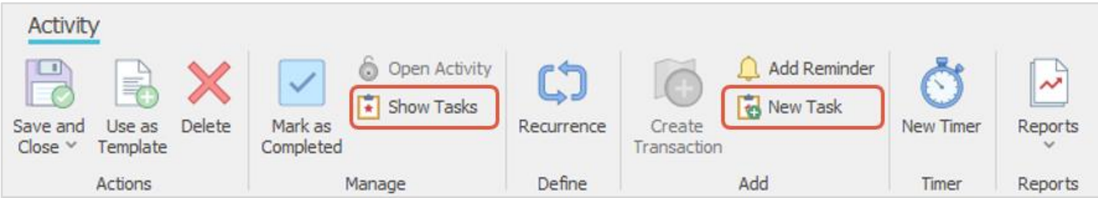
3. The Create Invoice button now contains the Until Selected Date / Periodical Invoice options.
4. When selecting either of the options you get a window for defining the required data.

Some of the former folders have also been replaced with ribbon actions, e.g.:

- For activities, whose type is Task, Phone Call, Appointment or Email, the former Work time entries folder has been replaced with the New Worktime and Show Worktimes actions on the ribbon.



- For activities, whose type is Critical task, the former Tasks folder has been replaced with the New Task and Show Tasks actions on the ribbon.

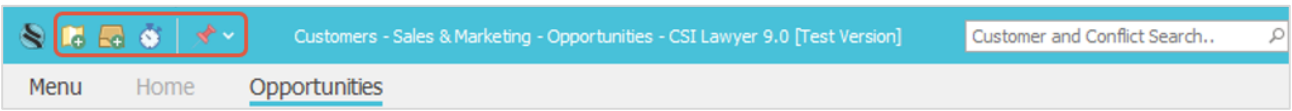


- Opportunities no longer have the Activities folder, but opportunity-related activities can be viewed by selecting the Show Activities button on the ribbon.

NEW FEATURES MAKING THE SYSTEM USE FASTER

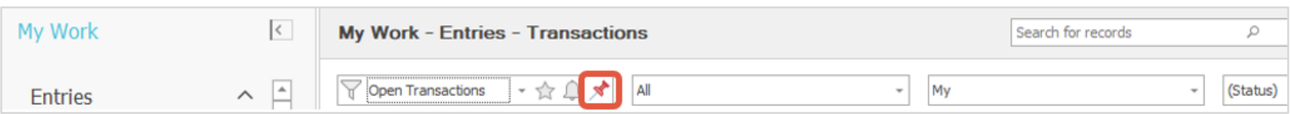
TOP BAR BUTTONS: TRANSACTION, ASSIGNMENT REQUEST, TIMER, VIEWS

The following quick actions have been added to the top bar.



– adds a new transaction
– creates a new assignment request
– starts a timer
– opens a list of views you have selected to be pinned

The Views button offers a direct access to the views which you have pinned to the view list. You can pin to the list your commonly used views, e.g. the view of your open transactions during this week. Just go to any view and select the button.



The view is now displayed by selecting the Views button in the top bar.

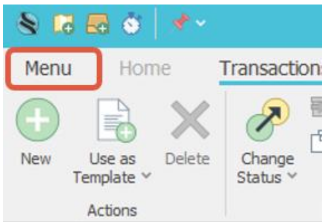
CUSTOMER AND CONFLICT SEARCH

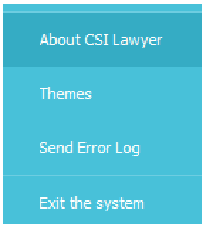
The new Customer and Conflict Search field, available on the right side of the top bar, enables making quick searches of customers and checking their possible conflicts.

Based on the search criteria you provide, the system lists all customers matching it as well as their role in different assignments (co-party, opponent or other).

MENU: VERSION DATA, THEME AND ERROR LOG

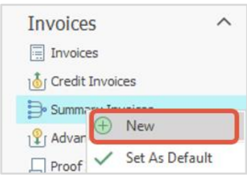
In the main window, there is a Menu button above the ribbon which opens a menu of the following actions:





- Viewing the information of your current CSI Lawyer version
- Managing themes of the system
- Sending an error log to CSI by e-mail
- Exiting the system.

CREATING A NEW RECORD DIRECTLY FROM THE FOLDER STRUCTURE

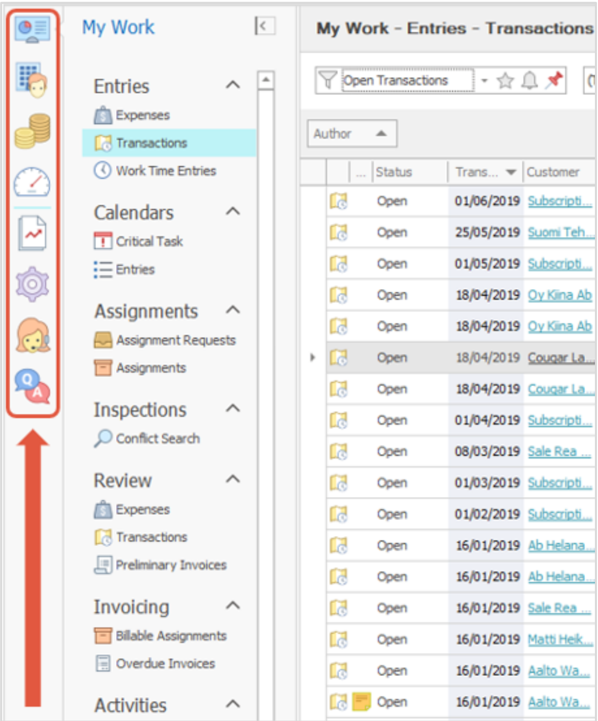


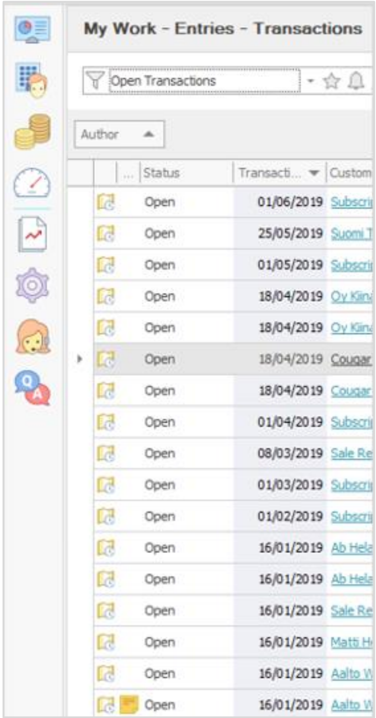
To make the system use faster and more convenient, you can now add a new record (e.g. a new assignment or summary invoice) without entering the folder at all. Just right-click the folder in the tree structure and select New.

HIDING A FOLDER STRUCTURE

In case you are using the system with a laptop having a small screen, hiding the system folder structure to get more space for the data may we useful.

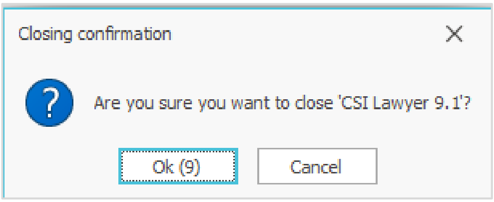
You can temporarily hide the folder structure by clicking the task area. The folder structure then disappears and only the task area column is displayed. To see the folder structure again, re-click the task areas.





CONFIRMATION WINDOW PREVENTING UNINTENTIONAL SYSTEM CLOSING

To prevent users from closing the system by accident, a confirmation window has been added to the closing process. Whenever you close CSI Lawyer, it asks if you really wish to close the program.



The timer leaves you 10 seconds to cancel closing. You can either select OK to close the system immediately or simply let the system close automatically when the timer reaches zero.