



Management Reporting

Legis has a number of standard reports available. External reporting can keep clients/providers up to date on a daily basis as to the matters in progress and the key stage that they have reached. Internal reporting allows for monitoring of caseloads, reviewing time reports for each case worker and monitoring disbursements, to name just a few. Additional reports can be customised with ease, to meet individual requirements. Reports can be printed, sent to Word, Excel, e-mail, etc. as required.

The hearing calendar is produced in Excel (allowing filters/sorts to be applied) showing at a glance all hearings and attendees.

Disbursements and Fees

Full tracking of all disbursements and fees is a major feature. Individual entries can be flagged as 'Include in next bill', 'Billed' or 'Written off'.

Financial control is maintained through special billing processes enabling you to keep an accurate track of the financial position of the matter, should you require it.

The screenshot shows a window titled "Disbursements and Fees". It contains a table with columns: No., Date, Type, Description, VAT Rate, Tot (inc VAT), and Notes. The table has one row with data: 1, 02/03/2009, DIS, Witness Summons, 0.00, 40.00. Below the table are buttons for "Add Item", "Amend Item", and "Delete/Undelete Item". There are also input fields for "Item No.", "To (select if setting bill status)", and "Set Item Billing Status". A "Total (including VAT)" field shows "40.00". Other buttons include "OK", "Cancel", "Help", "View Active", "View Deleted", "Print to Excel", and "Bill".

Tasks

If you prefer a task list driven workload, Legis will be configured to run that way for you. Outstanding work can be viewed across all cases and at individual case level.

Powerful filters allow users to prioritise their list of tasks, and a single mouse click is often all that is needed to get Legis to step through the task to completion.

New tasks are often generated automatically through the workflow. These tasks can also be automatically cancelled through the workflow.

Case workers can add and maintain tasks manually through a simple process. Additionally, tasks can also be escalated to direct lines of report.

Document Management Utility

To further assist in locating critical documents, the Legis Document Management Utility can index all documents. This powerful feature allows you to search, using multiple search criteria, the entire Legis database for documents.

With this facility, single/multiple documents can be selected then printed or copied to other secure locations.

Application Integration

Legis is integrated with Outlook. E-mails are stored within the matter together with any attachments. SMS messages can be generated and sent manually or automatically from the running of specific tasks. Faxes can be sent via Rightfax or ZetaFax. Laserforms are automatically populated with data. Also supports viewing of Oyez forms. Completed forms are stored for rapid future retrieval and adjustment.

Emails, SMS messages, faxes and Laserforms are all stored behind the Legis diary history, for instant perusal.

Help

Legis not only supplies a comprehensive on-line context sensitive help system, but can be easily extended to include guidance on legal processes, in house policies and procedures for training new staff, reducing training overhead. This process can be under the control of your own support team.

Time Recording

Legis has a powerful built-in ability to allocate time to all case workers working on their cases. Specific charge rates are dependent on case worker experience/type of claim. Legis can integrate with Accounts systems, if required.

What else can we offer to assist you?

In addition to delivering the best and most flexible Case Management tool on the market, KsysLegal also offer business analysis. Experience and expertise built up over many years, working both in and with Law practises, allows us to deliver comprehensive solutions that return substantial benefits to your business.

We also offer extensive training to both IT professionals and end users, as well as bespoke development.



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