

# MITRATECH

## **Lawtrac® 4.0**

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## Report Writer Guide

## Lawtrac 4.0 Report Writer Guide

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Apache Software Foundation (<http://www.apache.org/>)

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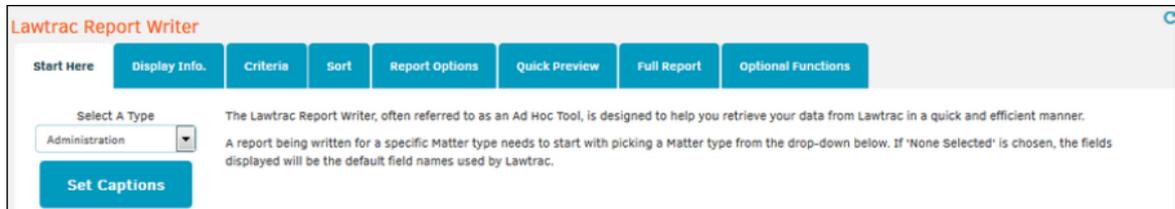
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# 1 Lawtrac Report Writer Help

The **Lawtrac Report Writer** (LRW) has replaced the Ad Hoc tool. It is designed to accommodate varied reporting needs by giving users the ability to create their own original reports. Enhancements have been made so that extensive knowledge of the database and its structure is not necessary to utilize this tool.



Report Writer Home Screen

Users can utilize the LRW to:

- Supply information at both a broad level and a detailed level.
- Construct complex reports that require information summarized at multiple levels.
- Give subtotals as well as page totals.
- Provide counts of information.
- Present report results that can be either printed or emailed.
- Offer multiple report formatting options.
- Build SQL statements without requiring you to know the fields that require joins.
- Provide advanced sorting functions for reports.
- Allow users to customize report criteria.

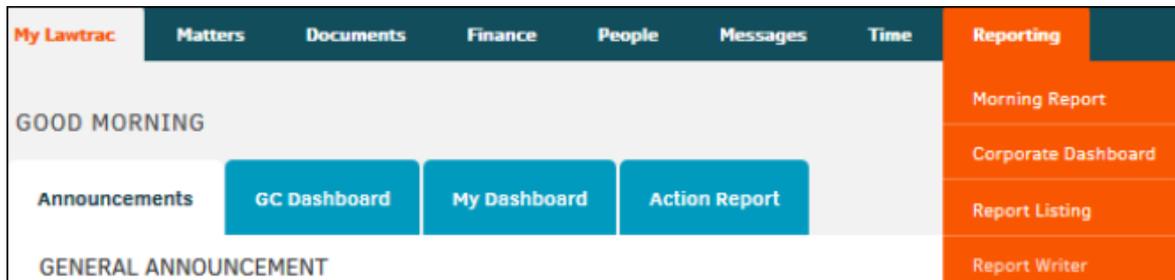
## 1.1 Before Creating a Report

Begin by planning out the report before creating a design. Determine the answers to the following questions:

- What is the goal of this report?
- What information is needed to create this report?
- Where is the information stored that is needed for the report?
- What criteria needs to be set to ensure that the relevant information shows?
- What information do you want to display on the final report?

## 1.2 Accessing the LRW

Highlight **Reporting** on the Top Navigation Bar with your cursor to open the **Reporting** drop-down menu. Click the **Report Writer** hyperlink.



Accessing the LRW

## 1.3 Creating a New Report

When you open the LRW tool, you are automatically requested to select the matter type (Step 1). Options must be selected in this stage and at the **Matter Display Selection** screen (Step 2) for **Report Writer** to function. Detailed information about each step and option is listed below:

[Step 1: Select Matter Type](#)

[Step 2: Select Matter Display Information](#)

[Step 3: Select Matter Criteria](#)

- [Search Criteria Rules](#)

[Step 4: Select Sorting Fields](#)

[Step 5: Select Report Options](#)

[Step 6: Quick Preview](#)

[Step 7: Full Report](#)

[Step 8: Optional Functions](#)

- [Report Templates](#)
- [Saving Report to Folder](#)

[Making Changes in Previous Steps](#)

**Note:** Click the **Refresh** symbol  in the top right corner of the step screen at any point to reset all checkboxes and entry fields.

### 1.3.1 Step 1: Select Matter Type

The **Start Here** tab offers a drop-down list of matter types from which to choose. The matter types are listed in alphabetical order.

1. Choose a specific matter type or choose "None Selected" if no specific matter type is necessary for your report.

If "None Selected" is chosen, the fields displayed are the default field names used by Lawtrac. Refer to [Step 2 - Select Matter Display Information](#) for more detail.

2. Click **Set Captions** once you have made a selection in Step 1.

**Note:** If a specific matter type is selected in Step 1, the captions displayed in Step 2 are specific to that matter type, i.e. Litigation matter type offers Litigation captions.

You may return to any previous step throughout the process. All entered information is retained and can be changed. If you backtrack to a step to make changes, ensure that choices in all other steps are still compatible and that you have saved your changes.



### 1.3.2 Step 2: Select Matter Display Information

All available data that can be displayed in a report is listed in Step 2. Select the checkbox next to the data items that you want displayed in the report. If you selected a matter type in Step 1, the data captions that your company uses are displayed. If "None Selected" is chosen in Step 1, you see the default Lawtrac captions.

**Lawtrac Report Writer**

Start Here | **Display Info.** | Criteria | Sort | Report Options | Quick Preview | Full Report | Optional Functions

**BASIC MATTER INFORMATION**

Matter Number       Matter Name       Matter Short Name

**MATTER DATES**

Date Opened       Date Closed       Date Changed       Date Filed  
 Trial Date       Status Date

**CLASSIFICATIONS AND VITALS**

Type       Keyword       Issues       Status  
 Court       Priority

**RELATED INFORMATION AND KEY DATES**

Fed/State Flag       Reference No       Claim No.       Loss Date  
 Index Number       Date 01       Date 02       Date 03  
 Date 04       Date 05       Date 06       Date 07  
 Date 08       Date 09       Date 10       Amount Claimed

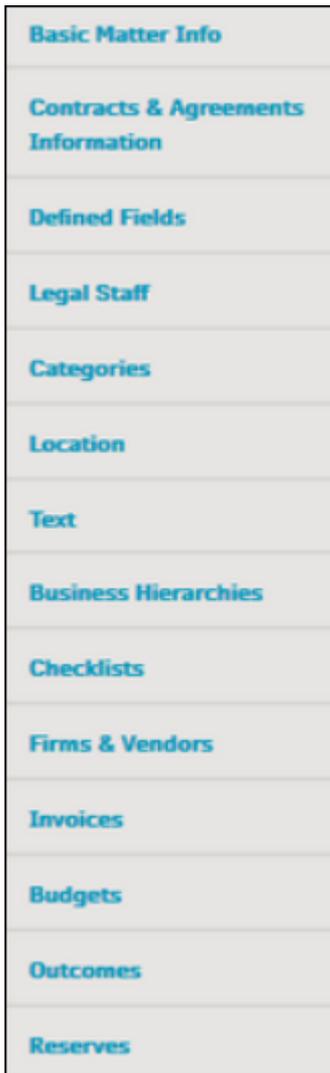
**Save**

Display Information Tab

Display selections can be set for your report in the following categories from the initial screen:

- Basic Matter Information
- Matter Dates
- Classifications and Vitals
- Related Information and Key Dates

More detailed information selections can be set on the right sidebar. Selections made to these categories populate the fields available in the **Criteria** tab (Step 3).



Sidebar Navigation for Display Information

When finished, click **Save** at the bottom of the **Display Info** page.

**Note:** If the full report is displaying an error message after selecting the display information, try eliminating the total invoice amount from the report, if selected.

**Known Issues:** The Lawtrac Development team is currently working to fix a defect that is caused by selecting **Total Invoice Amount** in the **Invoices** section of **Display Info**.

### 1.3.3 Step 3: Select Matter Criteria

1. Select the checkbox next to the data items that you want displayed in the report. An item must be selected here if you wish to display or sort by that item.

Use the scroll bar to view all available criteria categories. These categories are based on the selections made in [Step 2](#) and [Step 1](#). You may return to any previous step if you need to make changes. Make sure to **Save** from this screen for your changes to be reflected in the report.

The screenshot displays the 'Criteria' tab of the Report Writer interface. It is divided into several sections for filtering data:

- BASIC MATTER INFORMATION:** Includes radio buttons for 'All Open Matters' (selected), 'All Closed Matters', and 'All Matters'. It also has checkboxes for 'Matter Number', 'Matter Name', and 'Matter Short Name', each with a 'Select' dropdown and a text input field.
- MATTER DATES:** Contains checkboxes for 'Date Opened', 'Date Closed', 'Date Changed', 'Date Filed', 'Trial Date', and 'Status-Update Date'. Each has a 'Select' dropdown and a text input field.
- CLASSIFICATIONS AND VITALS:** Features checkboxes for 'Matter Type', 'Keyword', 'Issues', and 'Status-Update'. Each has a list of options in a scrollable dropdown menu.
  - Matter Type:** Acquisitions & Divestitures, Administration, Advice & Counseling, Claim.
  - Keyword:** Abatement, Access, Acquisition Due Diligence, Acquisitions.
  - Issues:** Age, Air, Ap Feed, Ap Return Feed.
  - Status-Update:** Active, Arbitration, Archived, Closed.
  - Court1:** 12th Circuit Court3, 3d Circuit Court, California Court of Appeals, California Superior Court.
  - Priority:** Medium, Urgent, Undecided.
- RELATED INFORMATION AND KEY DATES:** Includes checkboxes for 'Fed/State Flag' and 'Index Number', each with a 'Select' dropdown and a text input field.

'Jump to Save' links are present at the end of each section.

- To select a data item as a report filter, check the box beside the field name and complete the criteria information. Some of the data items have a drop-down menu that contains criteria rules that you can select; others have data values in a drop-down list that you can select. If you select a data item that has the criteria rules, then you would also select one of the criteria rules (i.e. >, <=, IN, LIKE, etc.), and then type specific information into the text box to the right.
  - For a data item that has data values in a drop-down list, check the box, then highlight the appropriate data value.
  - To highlight more than one value, hold the **CTRL** button down on your keyboard while clicking.

Users can save after each section rather than waiting to save for the entire document by clicking **Jump to Save**.

### 1.3.3.1 Search Criteria Rules

#### "Like" Search Criteria

When using "Like" search criteria in [Step 3](#), use the wild card (%). For example, if you were looking for a matter name that has "port" in the beginning, you would type in port%. For a word with "port" in the middle you would type %port%. For a word with "port" at the end you would enter %port. See the example below for a sample matter named "Legal\_Team\_Support."

The screenshot shows the 'Lawtrac Report Writer' interface. At the top, there are navigation tabs: 'Start Here', 'Display Info.', 'Criteria', 'Sort', 'Report Options', 'Quick Preview', 'Full Report', and 'Optional Functions'. Below the tabs, the 'Criteria' section is active, showing 'BASIC MATTER INFORMATION'. There are three radio buttons: 'All Open Matters' (selected), 'All Closed Matters', and 'All Matters'. There are two checkboxes: 'Matter Number' (unchecked) and 'Matter Name' (checked). There are two search criteria fields: 'Matter Short Name' with a 'Like' dropdown and 'legal%' text, and 'Matter Name' with a 'Like' dropdown and '%port' text. A 'Jump to Save' link is at the bottom right.

LIKE Search Criteria Example

## "Between" Search Criteria

When using "Between" search criteria, the use of single quotes is required. You must enclose each term in single quotes and separate the terms with the word "and". For example, to limit the results to dates between January 1, 2010 and June 1, 2010, enter "'01/01/2010' and '06/01/2010'".

The screenshot shows the 'MATTER DATES' section of the 'Lawtrac Report Writer' interface. There are three checkboxes: 'Date Opened' (checked), 'Date Changed' (unchecked), and 'Trial Date' (unchecked). There are three dropdown menus: 'Between' (selected), 'Select', and 'Select'. There are three text input fields: '01/02/01' and '01/01/99', and two empty fields. There are three checkboxes: 'Date Closed' (unchecked), 'Date Filed' (unchecked), and 'Status Date' (unchecked). There are three dropdown menus: 'Select', 'Select', and 'Select'. A 'Jump to Save' link is at the bottom right.

BETWEEN Search Criteria Example

### 1.3.4 Step 4: Select Sorting Fields

The next step sorts the information within a specific column. Each column is sorted in ascending order unless the **Descending Order** box is checked, thus sorting the column in descending order.

1. To set the first and primary sort order, select the desired field in the **Primary Sort** box.
2. If this is the only field you wish to have sorted, click **Save** and proceed to the next step. If the data needs to be sorted further, select the desired field in the **Secondary Sort** box, then the **Third Sort** box, then the **Fourth Sort** Box, if desired.

*The **Primary Sort** field should be set to **Type** for best results.*

**Note:** You have to sort in order: **Primary—Secondary—Third—Fourth**. You cannot do a **Primary Sort** and then a **Fourth Sort**. For example: To organize the report by matter type then by matter name, select "Matter Type" in the **Primary Sort** box, and select "Matter Name" in the **Secondary Sort** box. The report shows the rows in order by matter type, and then within each matter type sort the rows by the matter name.

Report Writer Sorting Fields

### 1.3.5 Step 5: Select Report Options

- Using the radio buttons, choose either **List format** or **Group format** depending on the type of report you want (refer to the **Formats** section below for details).
- Enter a report title. This title is applied to all formats and hard-coded in the report.

Publishing Options

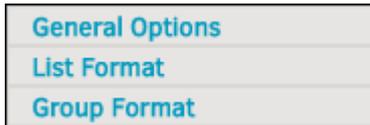
- Click the checkbox next to "Get only Distinct Values" in order to eliminate duplicate rows. (A "distinct" set returns only one row when there are multiple rows that have identical information across all columns).

If Distinct Values is selected, you may not select any field that is a text field, and you may not sort on any field that has not been previously selected.

4. The "Counts" option calculates the number of items in each row. For example, if you select Matters and Type 5 it counts only the number of matters with Type 5 rather than listing all the results.

## Formats

Choose between list and group formats on the **Select Report Options** page. The right sidebar provides links for users to adjust the "Field Sort" values as well as the headers and grouping details.



Report Options Sidebar

### List Format

A list view provides users with an itemized list arranged by the type of matter (if Type was set as the primary filter as recommended).

**Note:** Select **List Format** from the right sidebar of the **Report Options** page to change the section headers or field values.

MATTER NUMBER	TYPE	DATE OPENED
CON00001	Contract	12/09/15
CON00003	Contract	12/11/15
CON00004	Contract	12/14/15

9 Records

### Group Format

The group view provides users with a detailed list arranged by the type of matter (if Type was set as the primary filter as recommended). Group filters can also display the total values for different groups if you click the checkboxes on the **Group Format Options** page.

*Users are also able to select the display format of the report. The default report setting displays the report as HTML; all other document forms require the user to download the report as an Excel, Word, or PDF file from the **Report Writer**.*

Lawtrac Report Writer

Start Here Display Info. Criteria Sort Report Options Quick Preview Full Report Optional Functions

TYPE	MATTER NAME
Project	Myers W Vs. Top Button Shirts
	Myers W Vs. Top Button Shirts Records: 1
	Morgan Q Vs. Top Button Shirts
	Morgan Q Vs. Top Button Shirts Records: 1
Project Records: 2	
Contract	Contract Review: F. Calkin - Winston
	Contract Review: F. Calkin - Winston Records: 1
Contract Records: 1	
Project	Sullivan T. Brooklyn - Non-suit
	Sullivan T. Brooklyn - Non-suit Records: 1
	Lee A. Columbia - Damages
	Lee A. Columbia - Damages Records: 1
Project Records: 2	
Contract	Contract Review: Z. Sanchez - Princeville
	Contract Review: Z. Sanchez - Princeville Records: 1
Contract Records: 1	
Project	Calkin A. Seoul - Writ
	Calkin A. Seoul - Writ Records: 1

25 Records

### 1.3.6 Step 6: Quick Preview

**Quick Preview** allows users to view their report as it shall appear in **Full Report**. If this section does not load, ensure that Type is set as the primary sorting field and criteria in the preceding steps.

Users are prompted to select the document type if more than one has been selected on [Step 5](#).

Start Here Display Info. Criteria Sort Report Options Quick Preview Full Report Optional Functions

Select a format to display the report preview. Quick preview will only show the first 25 results.

HTML
  Word
  Excel
  PDF

Select Format for Quick Preview

### 1.3.7 Step 7: Full Report

**Full Report** allows users to view or download their report. If this section does not load, ensure that Type is set as the primary sorting field and criteria in the preceding steps.

Users are prompted to select the document type if more than one has been selected on [Step 5](#).

Start Here Display Info. Criteria Sort Report Options Quick Preview Full Report Optional Functions

Select a format to display the report.

HTML
  Word
  Excel
  PDF

[Click here to download.](#)

Select Format for Full Report

### 1.3.8 Optional Functions

This tab allows for complicated calculations and functions and is recommended for advanced users only.

The tab opens to **Advanced Options** from the **Optional Functions** sidebar by default. **Advanced Options** vary according to the different types of data previously chosen.

**Sums: Fields With Values** pulls up any column selected that contains numeric values. Choosing one or more of these fields results in that field being summarized in the report. For example, if you want a sum of invoices you would select to sum the field here. You can select one or more of these items.

**Calculated Fields** gives you the option to create an arithmetic function within a report for one set of data. If you select 'TotalAmount' in the **Sums: Fields With Values** list you must select 'Sum of TotalAmount' in the **Calculated Fields: Fields With Values** box to the bottom right. If you select 'None' or 'Percent' then you cannot select 'Sum of TotalAmount' in the **Calculated Fields: Fields with Values** box. These are based on the [Step 4](#) numeric value. The **Operator** symbols are as follows: Addition (+), Subtractions (-), Multiplication (\*), and Division (/). Use division with caution—if the program is asked to divide a number by zero, an error occurs. When using **Calculated Fields** you must choose an **Alias**. This is the name of the column where the calculated information appears in the final report. This column name cannot be blank or have spaces.

**And's or Or's** is an advanced function for those who understand SQL.

#### 1.3.8.1 Report Templates

Saving a report as a template can expedite the process of writing new reports. Users can preserve the criteria and display information set by clicking the **Save as Template** link of the **Optional Functions** tab.

Users can load and delete their saved templates from the **Maintain Template List** link. Loading a report overwrites and cancels out any report currently in progress.



#### 1.3.8.2 Save Report to Folder

By clicking **Save Report to Folder** you can save your report so you can run it using different output formats: HTML, Excel, PDF, and MS Word. These output formats are selected in [Step 5](#).



The title for your report is displayed in the "Report Title" text box. It is the same title entered in [Step 7](#) and is hard-coded on the saved report.

1. Enter a file name in the "File Name" text box. The file name must be a unique name, up to 25 characters and no spaces.
2. A brief description of the report can be entered for future reference in the large text box. This is optional.
3. When finished, click **Save Report**. A message appears to confirm your report has been saved.

## 1.4 Making Changes in Previous Steps

Once a report is started, you can return to previous steps at any time as long as you have not logged out or the session has not been terminated. It is important to keep selections consistent throughout the report creation process. Be especially cautious of changing information in the earliest steps after you have chosen all other options. If you are doing a group report and change [Step 3](#), selections made in [Step 5](#) must be reorganized based on a new sort order. It is best to review all steps after making any changes to ensure that all of the information is compatible.

**Note:** As of the 4.0.7 release, users can make changes to saved reports when re-running them.

## 1.5 Troubleshooting

**Issue:** Users received an error after saving a report and attempting to view it as a Quick Preview or Full Report.

**Resolution:** In the ColdFusion Administrator, go to **Server Settings | Settings**. Increase the maximum number for POST request parameters. Depending on the number of request parameters, you may have to increase up to 500. See Server Setting Upload Limits for more detail.