Casemaker Weekly Update

In the Features Toolbar is a link to your Clients. In the Clients menu you can create and store a list of clients you will be doing research for. Click Add next to the client field, type in your client's name, and click Save. You also have the ability to set up several matters you are working on for that client. To add different matters to your clients, you will go through the same process of clicking Add, typing a title, and clicking Save. Once you have made your selections, choose Continue. You have now effectively logged in to do research for this client. The Client link will display the client's name, letting you know that from this point forward any research you do, or any documents you view, are being labelled as research for this client.

When you view your history, documents and search queries will be tagged with the time, date and client you had selected. Later, upon clicking the Sign Out link you will be logged out of the system and provided with a Session Summary. Like History, the Session Summary is a listing of everything you did while logged in - complete with a date, time and client labels; however, it is limited to only what you have done during this session. It is useful for some to sign out after completing research for that client. This way, every session summary is client-specific and you can print a copy of your session summary for your client files. The date and time stamps can help you keep track of your billable hours. If you have integrated your Cosmolex practice management account with Casemaker, that particular process is already handled for you! Please note – the session summary page is unique to the session and you will not be shown that page again. However, if you wish to see your client research information you can still find that in History as mentioned previously.