User manual - isolex lite, lite+ & basic - web

Introduction. Purpose of the documentation

The Lite editions, Lite + 1 and Basic, have been specially designed for those lawyers who want to achieve higher performances by organizing clients, files, contracts and deadlines. These editions consider some minimal functionalities, being ideal for situations where the financial issues are managed separately. The higher editions of isolex, however, deal with the part of reports, invoices, tasks and more. In this regard, consult the pages dedicated to these editions.

This documentation describes how to operate and use the isolex® application. Both the graphical elements of the application interface and the specific functionality of the application are described here.

Description isolex®

isolex® is a software solution for law firm that helps you to:

1. You have a unitary infrastructure of the information needed for the law firm;
2. Organize the internal work of the office optimally;
3. Manage your customer relationship comfortably;
4. Manage the clients' files, while monitoring the situation of the existing contracts;
5. You have a complete record of the deadlines in court;
6. Work safely and with maximum confidentiality.

Dashboard

The dashboard is the page where the user is redirected immediately after authentication. It provides some general information, such as:

- Calendar for the current month;
- List of events;
- List of the latest app views;
- List of messages received;
- Exchange.

Cabinet module

The Cabinet module aims to store personal information and files pertaining to the cabinet.

Thus, it includes an Overview (Data Cabinet), the Contacts list and the list of personal files pertaining to the cabinet.

Overview

The Overview page displays general information about the firm, such as address, contact details or bank accounts.

General information editing is done by accessing the Edit button, which appears hover over the Cabinet Details widget.

In the Bank Accounts widget, you can add all bank accounts related to the firm. To add a bank account, access the Add button, which appears when the mouse is positioned on the Bank Accounts widget.

If there is no value in the drop down list in the Bank field, a new bank will be added, by accessing the "+" button, located in the Bank field.

Also here is a list of the last seven contacts added to the application. By right-clicking on a contact in the list, you can view or add a contact directly from the widget that displays the last contacts in the application.

Contacts

This sub-module offers the possibility to view all the contacts entered in the application, automatically taking, from the application, everything that belongs to clients, banks, adversaries, the courts etc. but also those added manually.

By right-clicking on a contact in the list, it can be viewed, navigating to the location of the contact, from where it can be edited, modified or deleted.

File Manager

To view the personal documents related to the cabinet, navigate to the sub-module Documents in the Cabinet. In the file manager you can both upload or download files as well as other operations, such as archiving, copying or moving files in the same module or from one module to another module of the application. For example, to move / copy a file from Cabinet to another module, navigate to the Cabinet Documents page, right-click on the file / folder you want to copy or move.

From the menu that will be displayed, choose one of the desired options (copy or move). A window will open, from which you can choose the destination module.

Clients module

This module manages the external relationship. Here you will find the records of the clients, their files and their contracts.

Adding a customer can be done by accessing Customers from the left menu of the page,

In this window you can specify the following basic customer data:

- whether the client is a natural or legal person;
- the name or name of the natural or legal person;
- whether it is a permanent, occasional or potential customer;
- its geographical area.

If you want to add more information, after completing the data in the client add window, saving the data, opens the created client file where more information can be entered.

The list of customers, displays all active customers in the application.

Checking the option Including inactive clients, which is above the client list, also allows inactive clients to be displayed. In order to be distinguished from the active ones, inactive clients will be displayed in gray list.

By clicking on a row in the list, the details of the client will open in a new page, where you can view, modify or delete the information entered.

By navigating between tabs, user can see the details, files, contracts and documents of the chosen client .

- The Customer Details tab, displays a customer's information and allows a user to modify, add or delete non-mandatory information. At the same time, the menu structure allows deleting a client or setting it as inactive, actions that are possible by accessing the corresponding buttons at the top right of the page.

A client cannot be deleted if it is inactive or has related files / contracts.

If, however, it is desired to delete it, the associated files or contracts will be deleted first, and it will be possible to delete the client in question after these actions.

Also, setting a client as inactive can only be done after any form of collaboration with that client has ceased. In this respect, all active files or contracts will first be canceled or closed and archived, as the case may be.

Activating a file or contract that belongs to an inactive client will automatically trigger the client. The user will be informed by a confirmation message.

The Client Cases tab displays the list of files belonging to the selected client. The menu on this page allows the user to add a new file for the selected client, as well as delete them. By selecting a row by double clicking, you will navigate to the details of a file where you will be able to view or modify the information related to the file.

- The Client Contracts tab, displays all the contracts of the selected client. And in this case, by accessing the menu options, a new contract can be added for that customer or a contract can be deleted. By selecting a double-click contract, you will navigate to the contract details where you can view, edit or delete the information. More details in the Contracts Module.
- The Files Manager tab, displays all the documents attached to the client (the functionality of the file manager has been explained above).

Cases module

The Files module allows the user to view and manage all folders in the application in a structured way.

Adding a new case

To add a new case, navigate to the Cases module and access the Add New Case button, which is located on the top right of the page.

The new add case form will open.

In the "Type" section, it is required to choose the type of case (judicial case or another type case), and depending on the type chosen, the other fields will be filled in:

- Case subtype: You can add the folder category from a predefined list or by adding a category by save to writing;
- Case number: is the number of the court case, as it was registered with the registry. If there is no court number yet, the field will be filled in another way (example: FN / 2018).
- Instance: select an instance from the predefined list;
- Synchronization: By checking / unchecking Do not synchronize, you can choose to synchronize the case with the portal.
- Procedural stage: the desired procedural stage is chosen from a predefined list;
- Opponent: Add the opponent from the drop-down list or you can choose to create a new adversary by pressing the Add New Opponent button in the Opponent field.

- Case parts synchronization: by checking the File parts synchronization checkbox, all parts of the case will be automatically downloaded from the portal (other clients, other opponents, other parties).

After saving the data, the newly created case can be accessed, where additional information can be added.

By accessing a judicial case from the list of cases, we will get structured information on tabs.

- The Cases Details tab displays all the case information, which is structured into several groups. This is how the information that was entered with the addition of the case, but also details that can be completed after the case is opened, is taken over:

Internal number: it is automatically granted by the system when the case is created and cannot be modified;

Procedural stage: allows adding and selecting procedural stage;

Object value: the user can enter the value of the object of the file as well as its currency;

Case Details: is a text field where you can enter more details about the case;

The Object Case and **Legal matte**r: there are fields from which certain predetermined information can be selected;

Date of registration: is the date of registration of the case, information that will be taken immediately when the case is created;

The court: it will be chosen by selecting it from the default list of the courts;

Do not synchronize: Checking the "do not synchronize" option allows blocking the synchronization with the court portal;

Web case access: allows to access the case from portal.just.ro directly from the application;

Final solution: choose from a predefined list;

Solution details: can be filled in manually by the user or if the case is synchronized it will be automatically filled with the information taken from the site. If the solution is introduced by the user, the application will not overwrite the information that could be obtained from the portal.just.ro.

The conditions for a case to be retrieved automatically in the collection of cases that are synchronized with portal.just.ro are the following:

- the case must be non-archived and open;
- the case must be of judicial type;
- the "Do not sync" option from the case is not checked;
- the final solution of the case should be incomplete;
- the case has a specified court;
- the index (the information in the "" index "field from the courts) is correct;
- the type of court must be "Court of Appeal", "Court" or "Court";
- the official name (information in the Official Name field) must be filled in; The official name will always be in the format "CourtCAMPULUNGMOLDOVENESC". For

specialized courts, for example the Cluj Specialized Tribunal, the official name is the Commercial Court

Important: **All data obtained and provided through portal.just.ro may be modified according to the information made available by the portal administrator.**
Therefore, this information does not imply liability for the isolex team in any way for any notices or complaints regarding these data.

The menu on the top right of the file details page allows you to *Close, Archive* or *Delete* the file.

Archiving a file will only be possible after it has been closed in advance.

Closing a file implies that any activity has ceased and there are no deadlines in the future.

However, if you wish to close the file, the active terms can be deleted, thus closing the file is possible. If necessary, the file can be reopened later.

Deleting a file is only possible if it has no associated deadlines. In order to delete the file, the terms associated with the file will be deleted

- The Courts tab, displays the instance details added to a case. From the court tab, you can only view the court details. To change the court data, navigate to the Administration module.
- The Other Parts tab contains all the parts associated with the case. If an opponent was added while creating the case, it will automatically be found in the other parts tab. Also, here is a list of all the synchronized parts on portal.just.ro.
  The taking over of the opponents by synchronizing with the portal is done automatically with the legal entity category. The opponents taken over will have a tooltip by which the user is informed that he has been taken from the portal as a legal person. If you want to change the layout, the user will be able to convert the adversary from a legal person to a natural person and vice versa.

Right-clicking on a row in the parts list will bring up the context menu, with the following options:

- Create opponent from the case parties - the user can change the type of the selected party in the opponent;
- Create client from case parties - user can change the type of selected part in client;
- Replace with opponent - the user can replace the selected part with another opponent;
- Replace with client - the user can replace the selected part with another client.
- Delete - the user can choose to delete the selected part.

- The Case Terms tab contains the full list of terms associated with that case. Terms can be downloaded from portal.just.ro or entered manually by the user. If the terms are entered manually by the user, the system will not retrieve the same term from portal.just.ro.

The terms entered manually or downloaded from the portal will be automatically synchronized with the calendar of the application.
- The File Manager tab, displays all the documents attached to the case (the functionality of the file manager has been explained above).

Other case type

Folder Other case type, allows the introduction of another type of case that the user will name as he pleases. This case does not allow the synchronization with portal.just.ro nor the association with a court. As in the case of the judicial case, the details of the case contain several tabs:

- The Case Details tab displays all the information in a case, which can be modified, added or deleted by the user. For the details of each field see the Judicial Case;
- The Events tab, involves entering the date and time for the next event. The events are manually entered by the user, these are automatically taken in the calendar;
- The Other Parties tab, allows the addition of other parties, using the same system as for the "Opponents" tab in the Judicial Case;
- The File Manager, displays all the documents attached to the case (the functionality of the file manager is explained in the Documents sub-module).

Contracts Module

The contracts module allows to store all the contracts in one place, as well as to note the fees related to them.

Adding a contract

To add a new contract, navigate to the Contracts module and access the Add new contract button, which is located at the top right of the page that contains the list of contracts.

Checking the Without number option will allow you to add a simple, numberless contract, with only the following information required:

- **Client field** - requires selecting the desired client from the list of existing clients. If there is no desired client, a new client can be added in the same way explained in the other cases.
- **Contract language** - is for information purposes, a field where one chooses between Romanian or bilingual;
- **Currency** - you can choose the contract currency from a predefined list (Coins);
- **Type** - the type of the contract is selected from a predefined list;
- **Date** - is automatically filled with the date and time of the addition, with the possibility of modification. The system allows you to add data from both past and future.

After creating the new contract without number, its details can be opened where the rest of the information can be added. It is also permitted to add a number to the contract at a later date.

If you want to add a number contract, then the Without number option in the contract form, is not checked, and in addition to the fields explained above, you must fill in the Stub and Number fields.

In this case, the date must be within the date range corresponding to the number of contributors, and otherwise another number or date may be chosen for the addition of the contract to be possible.

When adding a new round, the maximum number is not mandatory, only the Lung. Ctr. is required, because according to this field the maximum number will be calculated, and the border can be set as default (it will be automatically chosen for future numbers). The minimum number from which a stub will start is 1.

Adding a new **stub** can be done in the Contracts module Settings sub-module.

Deleting a stub associated with a contract will not be possible and notification will be received.

The list of contracts is similar to the other lists in the application. By activating the Contracts module in the menu, the list of active contracts will open. The date filter allows you to view the contracts according to the desired time interval.

To view in the list of contracts including canceled or archived contracts, the Include inactive contracts filter is checked.

After a contract has been added, by selecting a contract from the double-click list, it will open in a new page where all its data will be displayed.

- The Contract Details tab, allows the user to enter the contract details as well as the information about the fees.
  The introduction of a fee is made from the Honor widget, located on the right side of the Contract Details page. Thus, the fee name, value, currency and date will be entered.

By right-clicking on a fee, the context menu will open, where the user will be able to view, add, edit and delete a fee.

The menu structure allows, in the case of the contracts module, more actions. Thus, by selecting the buttons in the left menu, the following actions can be performed:

- File archive, will set the status of the contract as archived;
- Cancel the contract, set the status of the contract as canceled;
- Delete contract, will delete the selected contract from the list of contracts, only after it is confirmed again by password by the user;
- Restore contract, you will unzip an archived contract;
- Open contract, it will reopen a contract that has been closed.

The cancellation of the contract will not be possible if the contract is canceled or archived. The user will receive a message to this effect.

If, however, it is desired to delete it, the corresponding contract will be unzipped or reopened.

- The File Manager tab, displays all the documents attached to the contract (the functionality of the file manager has been explained in the file manager sub-module).

Opponents module

isolex also offers the possibility to save the data related to an opponent. They can be entered manually or can be automatically inserted from the portal when a new case is added.

Adding a new opponent

To add a new opponent, choose the opponents module from the menu and access the Add new opponent button

Thus, the information needed to introduce a new opponent is the choice of the type of person and the introduction of the name. Once the information is saved, the new opponent is added and found in the opponents list.

In the list of opponents are all the opponents saved in the database, where the user can view their most important information, grouped in columns.

Right-clicking on an adversary from the list will open the context menu, from which the user will be able to view, add, edit, delete or transform an adversary from a natural person into a legal person or vice versa.

An opponent cannot be deleted if he is associated with a file. If you try to delete it, you will receive a notification message to this effect.

Hearing and events module

In this module you can view all the terms in the application, both those entered manually and those taken from the portal.just.ro.

Adding a new hearing

Adding a new term can be possible either by accessing the hearing and Events module from the menu, or by accessing the Terms tab of the folder for which you want to add the term / event.

The term can be selected directly to the desired file, using the list that contains all the files in the database.

The Status field, implies the classification of the hearing into one of the following types: judgment, pronouncement or event.

The entered hearings will be found in the tab file terms, within the file for which it was entered.

Also, all the entered terms will be automatically synchronized with the calendar.

Calendar Module

The calendar contains both the events added by the user and the deadlines taken from the files.

To add an event, select the Calendar module from the menu and access the Add New Event button at the top right of the Calendar page.

In the New Event Add box, the user can add the event title, description, start date and end date. You can also choose if the event is repetitive, add other guests to the event (by adding the email address in the Guests field), and add notifications.

Administration Module

The Administration module contains the following sub-modules:

Administration of courts

The administration of the courts is done through the Administration module. By clicking on the Instances option in the menu, the list of all instances found in the application will be displayed. Clicking on a court will open the court details in a new tab. Here, the user can manage the data of the respective court.

The menu on the left of the list allows you to add or delete a court. Deleting a court is only possible if the court is not associated with a file. Associating a instance with a file can be done by adding the file, where you can choose the desired instance from the drop-down list of the Instances field.

For synchronization with protal.just.ro it is obligatory to have the instance type, instance name and index number for the instance. Based on this information, the application will be able to retrieve data from the Write system.

Audit

In Audit, the application administrator, can view all the hits made by all users of the application.

In the audit list you can see the user, the url, the description of the action, the response and the date. Also, by accessing Select range, you can filter the search, selecting only the desired range.

Document settings
The **Default Folders** tab gives the user the ability to create default folders for the Customers, Contracts, Personal, Folders modules. Thus, each client / file / contract or new staff added will have the default folders created in the file manager.

In the **Recycle Bin** Tab, you will find all deleted files or folders in the application. From here the user has the possibility to restore or delete them permanently.

Files and folders found in the trash for more than 30 days will be automatically deleted.

Personnel

The Personnel sub-module will display the entire list of users or staff in the application.

To add a new user, access the Add New User button at the top right of the Personal page. After completing the form, the user will receive the authentication data at the email address.

Careful! The number of users allowed in the application depends on the Edition and the number of users chosen when registering for the isolex account.

The isolex application allows the addition of personnel. The personnel list refers only to the keeping of the personnel of the cabinet and not to the users of the application.

To add new staff, access the Add New Staff button at the top right of the page.

Convert user into a personal one

In order to transform a user into a personal one, the desired user from the list is selected and with the right click the option Transform into personal is selected from the context menu. Thus, the transformed user will be removed from the role and will no longer be able to use the authentication data.

Convert a personnel into a user one

To transform a staff into a user, select the desired staff from the list and with the right click, select the option Transform into user from the context menu.

This will open the personal transformation form into the user, where the role, email address and password of the new user will be completed.

After saving the data, the user will receive the application access data at the specified email address.

Personal settings

By accessing the Profile section at the top right of the page, the user information as well as the application settings will open.

Thus, you can set the default currency, time zone, date format, language used but also the option to receive emails. In order to receive emails with event notifications or other application notifications, the option to receive emails must be checked.

FAQ

- ***How to register an account in the isolex application?***
    1. Navigate to https://app.isolex.ro/auth/login

2. Select the Record option.

3. Fill in all the data from the registration form and choose the desired edition.

4. As soon as your application has been processed, you will receive the username and password required for authentication on the email address.

5. After saving the data, the user will receive in the email address, the necessary data for authentication.

Be careful! The number of users allowed in the application depends on the Edition and the number of users chosen when registering for the isolex account.

- ***What is the method of taking the time trial?***
  The taking of the time limits can be done both when registering a new file and after adding the file.

1. Choosing the desired file.
2. Enter the file number, exactly as it appears on portal.just.ro.
3. Selecting the court in the "court" field.

4. Checking the Sync option.
5. Data backup.
6. After the registration of the file, the time taken will be found in the list of terms from the file.

- *How do I add and set up a new court?*
  The isolex application has a predefined list of instances, but if a desired instance is not found in the list or has been deleted, here are the steps for adding and configuring a instance:

1. Accessing the Instances from the Isolex application Management module;
2. Access the Add button from the left menu of the Instances page.
3. Once the court add box is opened, it will be completed as follows:
4. type of court (court, court, court of appeal, prosecutor's office, ICCJ)
5. the name of the court (eg Câmpulung Moldovenesc Court)
6. the official name (the official name of a court will always be in the format "CourtCAMPULUNGMOLDOVENESC")
7. index (the index of a court can be found on the portal.just.ro website for each court separately. For the Timiș Tribunal the index is 30)
8. contact details (address, phone, email)

Synchronizing a file with portal.just.ro will not be done if the Index of a court is not completed correctly.

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