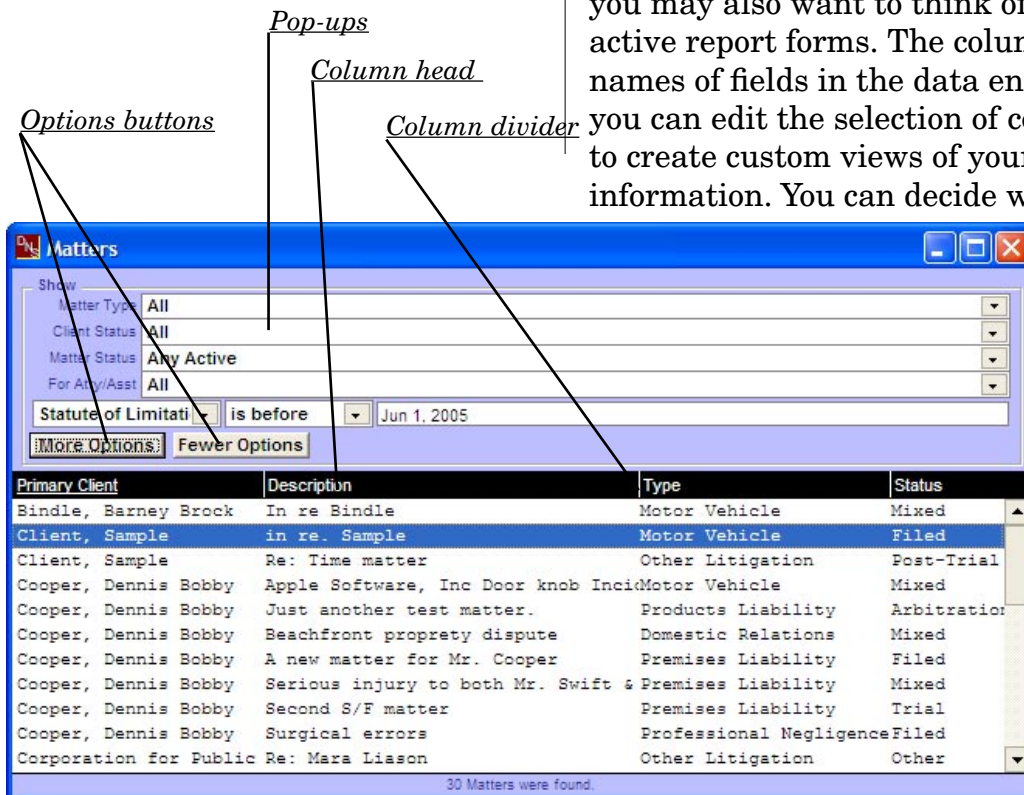


Working with Lists



Lists are windows available from the **Lists Menu**. They have some special features, and you may also want to think of them as interactive report forms. The column headers are names of fields in the data entry screens, and you can edit the selection of columns displayed to create custom views of your client and case information. You can decide which columns

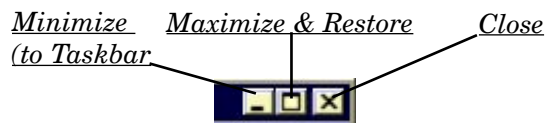
appear, their order, and how they are sorted,

With a *List* active (the front-most window) the following are some standard controls:

- Minimize, maximize and restore, and expand *List* windows (and other windows

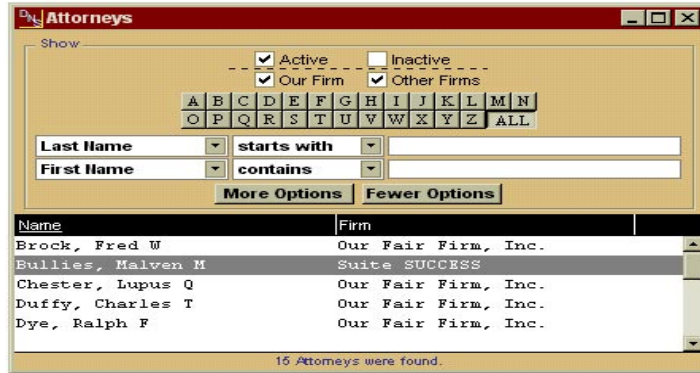
Matters List

as well) using the controls appropriate for the Windows operating system (shown below left).



Windows Control Buttons

- Resize a list window by dragging any side
- Add a new record to the list by choosing **New Record** from the **File Menu**, or pressing **Control-N**, or select **New** from the contextual (“right-mouse” or option-click) menu.
- Sort the list by clicking on a column name, The underlined column name is the field by which the list is sorted. Reverse the sorting direction (ascending and descending) by clicking again on the underlined column name.
- Limit (filter) the items in the list with the controls provided within the *Show* box above the list. In the *Matters List* illustrated above, these are *Pop-ups*, which offer a pop-up list of fields and the *Options Buttons*, which offer additional fields individually, to refine the filtering. Other



Attorneys List Controls

Set All Columns

lists, the *Attorneys List*, for example, use a different set of controls within the *Show* box, including *Alphabet* buttons to limit the selection to just those for whom the last name begins with the chosen letter.

Checkbox filters limit the list to entries which include the characteristic offered by the checkbox item.

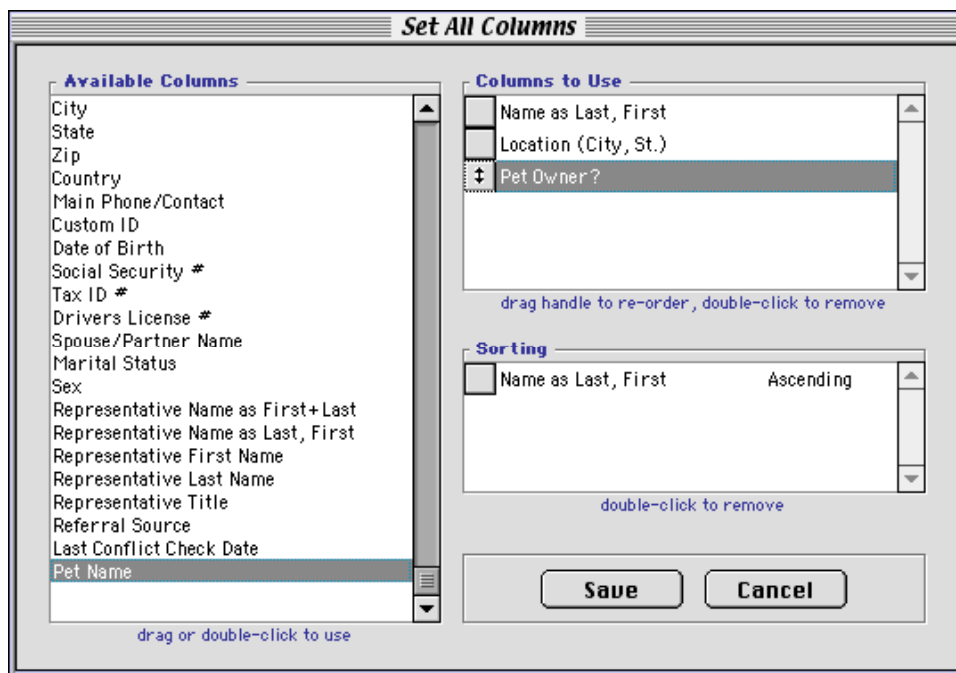
- Re-size a column by clicking and dragging between the columns. The border of a column is defined by the

line in the column head. If the *Personal Settings* option (from the **Edit Menu** of the main menu bar) to “Show Column Lines in Lists” is selected, these lines extend vertically through the data.

- Add a new column by clicking in the empty area to the right of the last column and selecting a new field name from the displayed contextual menu of available fields. Columns may be shown only once.

- Change a current column by clicking on the column head and selecting a different field name from the displayed contextual menu of available fields. Available fields include any custom fields which may have been added to the *Custom Fields* tab for this list (using **Administration Menu/Custom Fields**).

More direct control over the list is available from the *Set All Columns* dialog. Reach it from the contextual menu option **Set All Columns**. A complete list of available fields (columns) appears in a scrolling window on the left side of the dialog, including custom fields which have been added to the list. Select a column for display in your new list by double-clicking it, or by dragging it to the “Columns to Use” area of the dialog. When dragging a field, click it and hold the mouse button down for a moment before dragging. Choose a column to be the primary sorting field by dragging it to the **Sorting** window in the lower right of the dialog. The first field in



Set All Columns dialog

this list will be the “underlined” column head in your list, and the list will be sorted first by that column.

Sorting Lists

To sort in ascending or descending order, click and hold that term on the right side of the **Sorting** window. The terms *Ascending* and *Descending* will appear in a pop-up list,, and you may select either. If you add a

second field to the **Sorting** window, it will be a secondary sort field. This means that items will first be sorted by the first column, in ascending or descending order, and duplicates within the list will be sorted within their group on the second field, or column, in the list.

Note: You *can* sort on fields which do not appear in your list by putting fields in the **Sorting** window which do not appear in the **Columns to Use** window. This allows very customized sorting. For example, you could add a custom field called “Sort order” and place a number in it for each item in the list. Sorting on this column would let you force the list to appear in any order you wish. Keep in mind that sorting a list on fields which don’t *appear* in the list can be quite confusing to the user.

Saving Lists

The ten predefined lists originally in the **Lists Menu** normally return to their default settings after the list is closed. You can create your *own* views of the data and save them, and they may appear in the **List Menu** as well, or be automatically opened on starting the program. You



Save List dialog & List Menu with saved list



can even create a new default format for the list. Save a revised List by choosing **Save** from the **File Menu** while the list is the front-most window. This displays the *Save List* dialog shown at left. Give the revised list a different name (“Matters: By Description” for example), decide whether you want it to automatically appear in the **Lists Menu** or to be opened at program start-up, and check the appropriate checkboxes in the window.

Lists saved with the “Add to Lists Menu” checkbox marked appear in the menu below the predefined lists. Those saved without the checkbox marked are available from a menu that is displayed when the **Saved Lists** option in this menu is selected.

Those saved with the “Open at Startup” checkbox marked are automatically opened whenever this workstation starts up *CaseMgr*. And if you prefer to set a new default format for a list and to have your preferred format open when the original is selected from the menu or with the assigned key combination, here’s how to do it... Say you want your Client list always to show the client’s birthday and your referral source. Just create the new format by adding the two fields, give it a unique name, and then check the “Use for new lists of this type” checkbox. In this case there’s no need to check the “Add to lists menu” checkbox, since selecting the original *Clients List* from the menu now displays your customized list. The name of this list will show in the “Saved Lists” option of the **Lists Menu**, and if you want to change it, or delete it to revert to the original default arrangement of the *Client List*, you can open the Saved Lists window from the **Lists Menu** and open, rename or delete any saved list. You can also specify whether that saved list should be designated as visible in the main **Lists**



Saved List Window

Types of Lists

Matters	F2	
Clients	F3	
Attorneys	F4	
Law Firms	F5	
Medical Providers		F6
Expert Witnesses	F7	
Court Reporters	F8	
Insurance Companies	F9	
Insurance Adjusters	F10	
Other Contacts	F11	

Special Fields

Deleting an item

Menu, set as the default for lists of its type (with the type versions of the *Client List* or *Attorneys List*, for example), and whether it should automatically open when *De Novo CaseMgr* is started.

De Novo CaseMgr ships with ten different kinds of lists for keeping track of the people and organizations associated with your practice. They can be selected from the **Lists Menu** or activated with a *Control key / Function key* combination for quick keyboard access. The appropriate key combinations used to open each list may be viewed within the **Lists Menu**, to the right of each menu item.

Each of the ten types of list has its own selection of fields, and a special data entry, or detail, window designed for storing just the kinds of information appropriate to that list.

All lists in addition have two special features in common: *Notes Fields* and *Custom Fields*. Some Lists have additional *Linking Fields*, for linking particular kinds of information to information stored in other places. Other windows may have *Memo* fields, for storing text or *Phones, etc.* fields, for phone numbers, email addresses and websites. See the **Special Fields** chapter of the documentation for more detailed descriptions of these special fields.

Delete a list item by first double-clicking the item to open its detail window. Take care to confirm that the displayed item is, in fact, the one you want to permanently delete (deleted list items cannot be recovered). Then choose *Delete* from the **Edit Menu**, or right-click and choose *Delete* from the right-mouse contextual menu, or simultaneously press the *Delete* and *Ctrl* keys on your keyboard.