



Corporate and Estate Manager 15



IT Administration Guide



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Introduction to Corporate and Estate Manager

Emergent Corporate Manager ET is designed to handle the data storage, reporting and document assembly requirements of law firms and corporate legal departments.

Corporate and Estate Manager employs an MS SQL database to store the particular profiles of both Contacts and Matters and the relationships in play between each.

Matters are the actual profiles of the Corporations and Testators under administration by the department.

This guide has been designed as a reference for the more in depth administration and data entry for the Program.

Technical Support

Thank you for licensing Corporate Manager ET. We hope you enjoy using the program.

If you have questions about Corporate Manager ET do not hesitate to call the Emergent Help Desk at:

Vancouver:	778-372-0301
Edmonton:	780-229-0237
Calgary:	403-351-0299
Winnipeg:	204-201-1533
Toronto:	416-408-2833
Ottawa:	613-691-0153
Halifax:	902-334-1533
Toll-free:	866-408-2833

For Customer Service or Technical Support, dial Ext. 1
For Training Support, dial Ext. 4

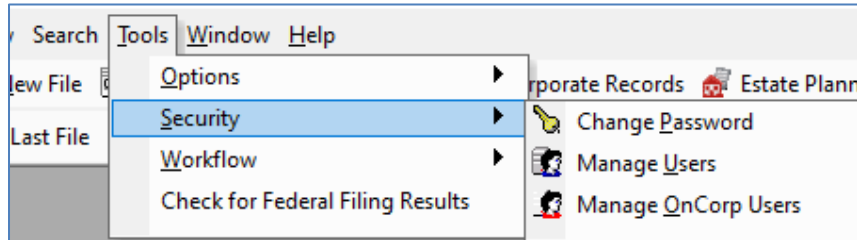


Chapter 1: Data Maintenance

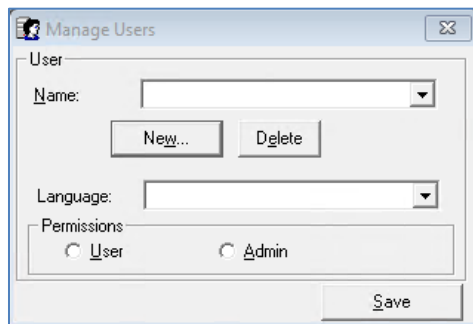


Adding/Deleting Users

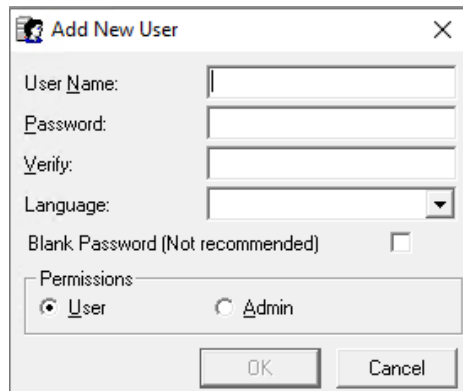
Adding Users is done through the Manage Users sections. Select **Tools > Security > Manage Users**.



In the Manage Users window, select **New**



Enter the Users name, password and identical password confirmation. If no password is required, select the **Blank Password** tickbox



There are two levels of security and permissions available in Corporate and Estate Manager ET: Administrator, and User. Each level provides different accessibility options for the User and is designed to help maintain the integrity of your database.

A password is not needed to delete a User, but can only be done by an Admin level User

Administrator

Administrator access is usually reserved for individuals in your organization such as System Administrators or the individual(s) responsible for maintaining the database and making permanent changes to the system.



Administrator access grants the individual the ability to make changes to the database, alter global settings that will affect all Users, set up or delete Users, set User accessibility levels, and change values in drop-down fields.

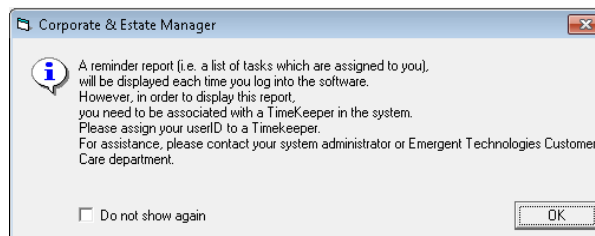
User

User access is likely what the majority of the individuals in your office will have. This type of access allows general Users to create new Contacts and Matters, create/change document templates, edit or delete existing Contacts and Matters, etc. This accessibility option is recommended for Users who are responsible for data entry, document creation, and report generation. This User will not have access to the Security or Application options or Data Maintenance Tables.

Workflow

The Workflow task reminder system is an integrated task management tool within Corporate and Estate Manager ET. Users are assigned tasks that populate Reminder Reports to manage the processing of Records. The Reminder Report opens each time Corporate and Estate Manager ET is started.

If the reminder system has not been configured with your Contact or Timekeeper details, the following message will be displayed:



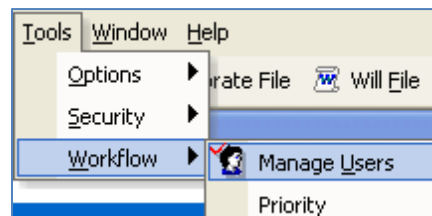
If the User will not be using workflow, check **Do Not Show again** to prevent from seeing this message at login.

Workflow Users

Any User who is listed as a **Timekeeper** can use Workflow and receive tasks.

The Timekeeper name and name used to log into Corporate Manger may be different. Because of this, Corporate Manager ET will need to know the relationship between login particulars and Timekeepers so that the correct tasks are assigned to the appropriate person. For Example, the Timekeeper Regis Smith may log in as Rsmith.

Select Tools > Workflow > Manager Users





The Manage Users screen will allow you to make these relationships. From the System User drop down, select the User's Corporate and Estate Manager ET **Login Name** and then select the **Timekeeper Name** in the dropdown. Once this association is made, Corporate Manager ET will know to assign tasks to Regis Smith and display them when Rsmith logs in.

The screenshot shows the 'Task Users' dialog box with the following fields:

- System User: [Empty dropdown]
- TimeKeeper Name: [Empty dropdown]
- Priority: Medium
- Due Date (i.e. Today plus): 60 Days
- Instructing Lawyer: [Empty text box]
- Task Note: [Empty text area]

Default Task Values

Tasks have default values that make it quicker to assign tasks. These values can always be changed when assigning a task. This can be accessed by **Tools > Workflow > Manage Users**.

The screenshot shows the 'Task Users' dialog box with the following pre-filled values:

- System User: EMERGENTECH\jturner
- TimeKeeper Name: Jean H. Turner
- Priority: Medium
- Due Date (i.e. Today plus): 60 Days
- Instructing Lawyer: Albert Sample Smythe
- Task Note: [Empty text area]

System User and Timekeeper Name – These can be the same or different individuals in your firm. For example, the Timekeeper Name could be the Lawyer or Clerk assigned to the Matter, and the System User could be the Assistant.

Priority – The priority for the Task. Set the Task priority to High, Medium or Low to better define the urgency of the Task. If priority is set to "High", then all Tasks will show High priority unless changed at the individual level.

Due Date – When this Task is scheduled for completion. You can enter 20 days to automatically create a Reminder Task for 20 days after documents have been sent to the Client.


Instructing Lawyer – The instructing lawyer.

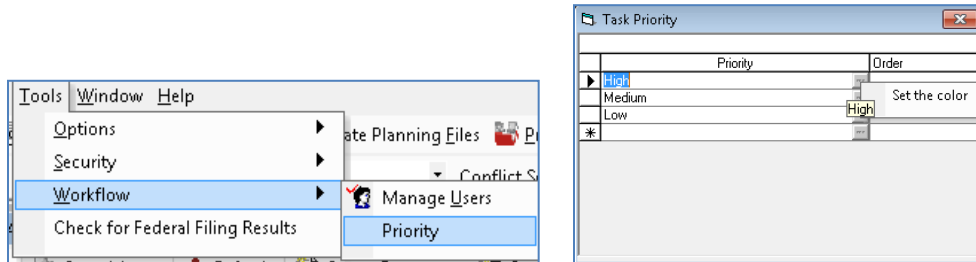
Task Note – Default Tasks details for the user.

NOTE: Any of these fields can be left blank (defaults do not have to be set) and completed each time a task is created or they can be changed at the individual Task level.

Task Priority

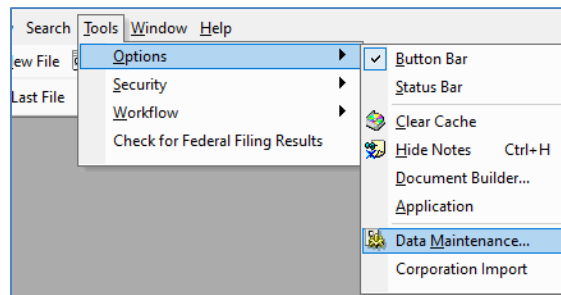


The Task Priority window allows you to define the colour, Order and Priority Values. By default, the priorities are set to Low, Medium and High. Click on **Tools > Workflow > Priority** and right-click on the  to set the colour for the task priority. Further Priorities can be added by clicking on the next empty field and entering a descriptive priority and setting the colour.

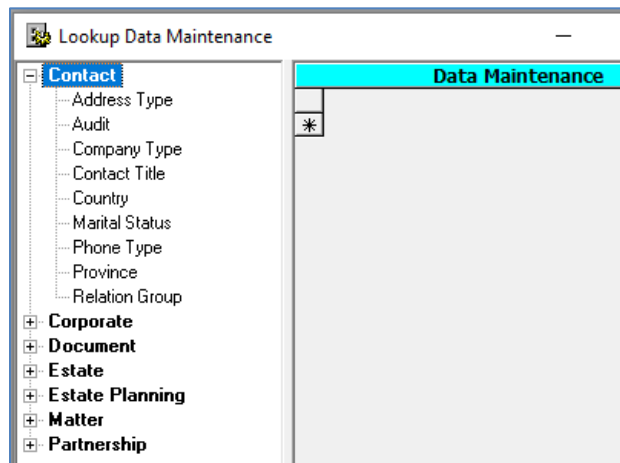


Changing Drop-Down Fields – Data Maintenance

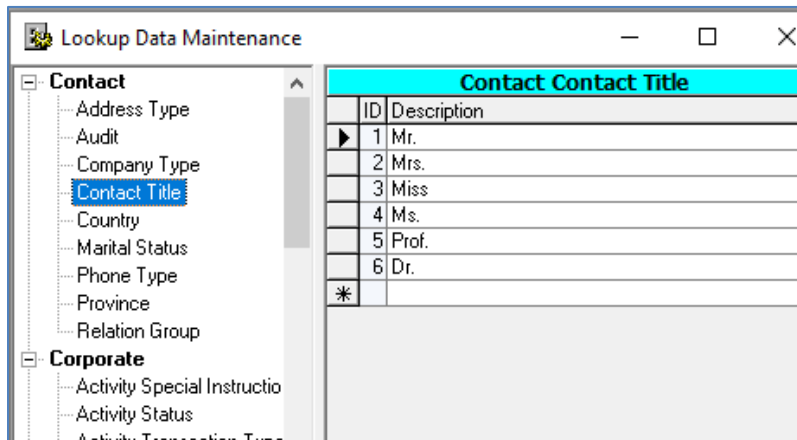
Only Admin Users have the ability to make changes to drop down fields. Go to the main menu bar and select **Tools > Options > Data Maintenance**.



The Corporate and Estate Manager Lookup Data Maintenance window appears.



From the list in the left column of this window, expand Corporate and select the heading for the field you would like to change.



Enter additional information or delete selections from the columns that appear in the right portion of the window.

NOTE: Do not delete a value from a row and leave it blank if you want to remove it from a list. It is important that the entire row be deleted by selecting the row and using the **Del** key on the keyboard. Deleting the value only will leave a blank in the dropdowns.


Adding Timekeepers Types

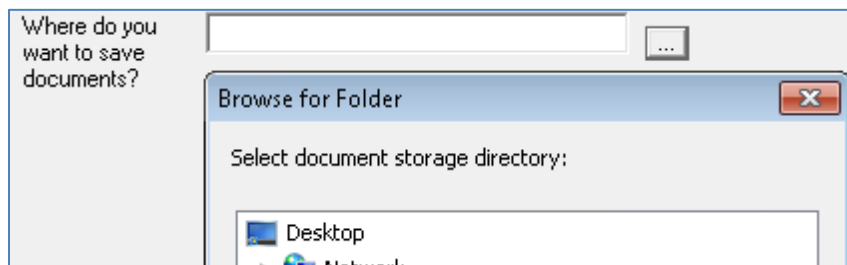
The purpose of the Timekeepers section is to enter the Employee Contacts that are responsible for the Matter within your firm. This includes Lawyers, Law Clerks, Secretaries, Agent for Service, etc. Many of these Types can depend on your Jurisdiction.

A new Type/Relationship can be added through **Tools > Options > Data Maintenance > Matter > Player Type**.

Update Saved Document Folder Locations

From time to time, it might be necessary to change the folder name for saved documents in custom folder locations. Reasons for this may include a change in company name. Firstly, change the name of the current folder. To then update all saved documents for this matter, follow one of these two steps:

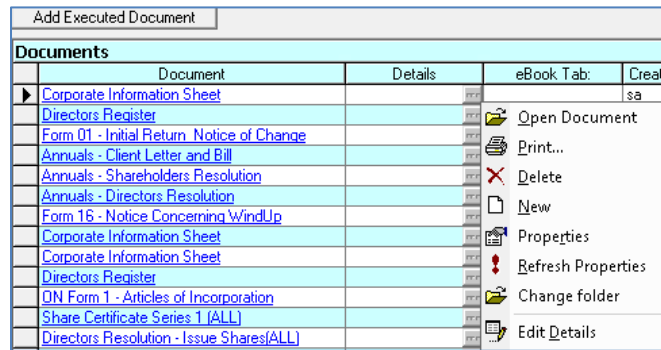
On the **Administration/Annuals Tab** at the text window for **Where do you want to save documents?** click on  and point to the new folder.



OR

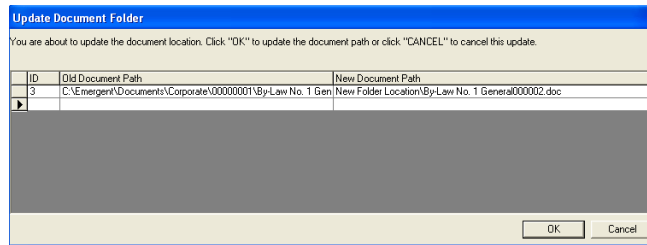


In the **Created Documents Tab**, click on any document row and select change folder.



Point to the renamed folder.

Confirm that the information is correct and choose OK to update the document path.





Chapter 2: Document Customization



Document Customization

Custom Logo on Reports

To add an image such as the Firm logo to reports, the following items must be set up:

Create a bitmap (.bmp) or .jpg image of your logo. The reports can accommodate a wide variety of sizes of the logo. However, the space allocated for the logo on the reports is limited. The default size requirement is 140 x340 pixels

Select **Tools > Options > Data Maintenance**. Click the **+** to the left of **Matter** and click on **Application** option. In the Value column to the right of EtManagerLoGO, enter the full path and file name of the logo. E.g. \\Server1\Emergent\Templates\ETCorpLogo.bmp.

NOTE: *It is ideal to place this image in a network location, where everyone has access to it.*

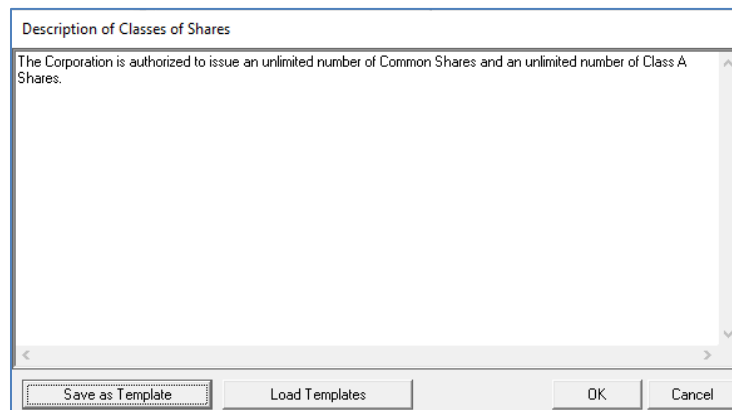
To disable this feature, remove the logo from the destination folder and your reports will complete without the logo.

The Application Option for this logo file will be pointing to the same location as your template folder by Default. The default name for the logo file is ETCorpLogo.bmp, but this can be changed.

Adding Default Clauses for Articles of Incorporation

Clauses used for Business Restrictions, Restrictions on Transfers and Other Provisions can be saved to be used when entering other Companies into Corporate Manager ET. This can be done from the third step of the Organization Wizard or the By-Laws/Jurisdictions Tab/By-Law/Quorum section and selecting the appropriate button. To add a new clause:

Type, or copy and paste the text into this field and choose **Save as Template**.





You can then name the Template and **Save New Template**.

By selecting the appropriate button on the Corporate Tab, a list of all pre-defined clauses will be made available for selection.

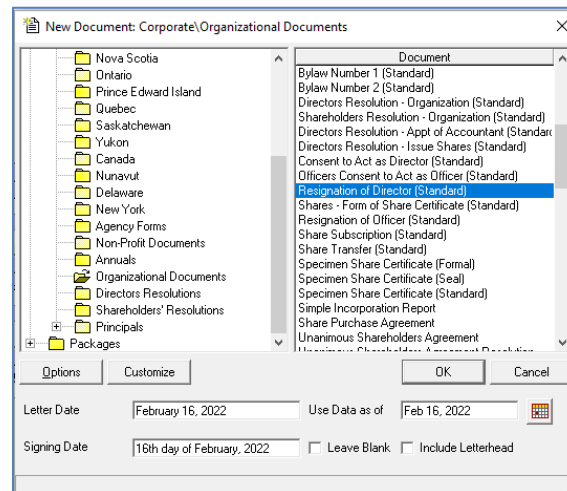
Note: *It is recommended to create the new Template clauses in a Word document and set all attributes, such as font, paragraph justification and spacing, and then copy/paste into the Template window. This will ensure all paragraphs appear the same in the resulting documents.*

Creating Custom Templates

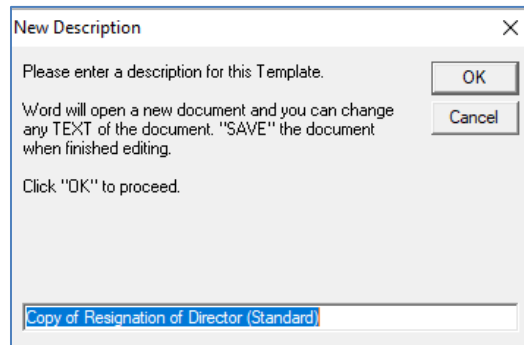
Note: *Government Forms and Templates or Documents contained in Packages should NOT be edited. This procedure should only be done on minute book documents.*

The quickest and most efficient way to create a new Template is to base it on an existing template. The benefit to this method rather than changing the existing Template directly is that a completely new Template is created and future updates made by Emergent to Emergent Corporate and Estates ET will not overwrite the changes made to the generic Emergent Templates.

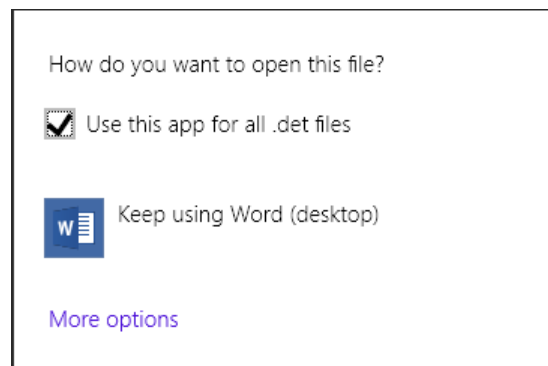
To create a custom template, start the **Create Documents** process from any matter, choose the document most like the new document you wish to create and click on the **Customize** button.



You will then be asked for a password. The default password is **Emergent01**, which will open a dialogue box asking for the name of the new document.



If you are asked, use Word to open the new document.



The new document will open automatically in word ready for customization.

Note: Be **VERY** careful not to change anything between the chevrons <<●>> as these are the merge fields that generate the information in the documents. Also, be aware that changing any section breaks may also affect the behavior of your documents. Changes should be restricted to the wording of the document only.

TO: «THECORP» (the “Corporation”)
AND TO: THE DIRECTORS THEREOF

I, the undersigned, hereby resign as the «txtsOfficerTitle0» of the Corporation to take effect immediately.

DATED «LegalDate».

«txtOfficerName0»



Fields

Fields are the words or phrases in the template with <<●>> surrounding them. When clicked on, a grey box appears. «THECORP» «txtOfficerName0»

Fields can be copied, moved or formatted for styles (font, size, paragraph, etc.) but it's important that the text of the field is not altered in any way. These are the merge fields that insert the data from the appropriate Contact Card.

Sections

IT IS VERY IMPORTANT NEVER TO REMOVE OR CHANGE THE LOCATION OF SECTION BREAKS

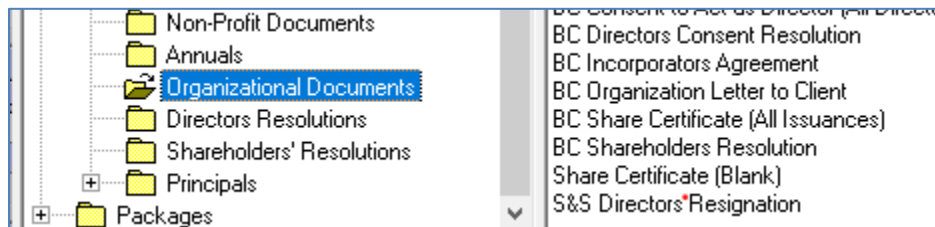
Section breaks control what portions of text will show or be removed on document creation. For example, if the "Audit Exempt" box is checked in Corporate Manager ET, the wording for Accountants will appear in the document instead of the wording relating to Auditors.

To remove a Custom Template from the Document List, go to **Tools > Options > Data Maintenance > Document > Document**, locate the name of the Custom Template and delete the row.

Test your Template

Once you have created your new customized document, save and close it. It is important to always test the Template after changes were made. Merge it to see the Template with the expected changes.

The newly created template will be available at the bottom of the document list in that folder and can be used in the same manner as any other template.



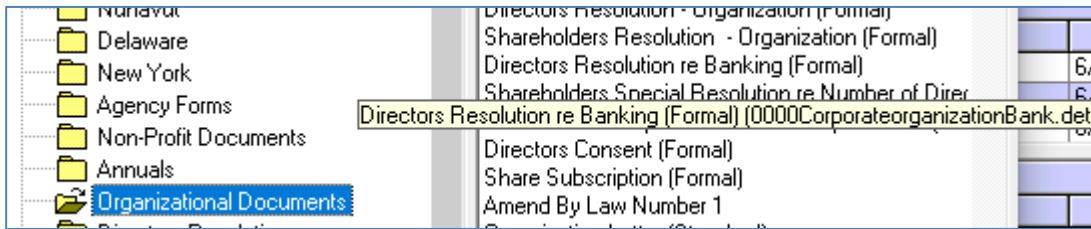
Editing Existing Templates

Note: It is important to create a backup of both the original and the final edited document. If the document is "broken" during editing, the original backup will still be available. After editing, any future updates from Emergent will overwrite the changes made during this process, unlike the Customize process.

Follow this process when text, font, format or style changes are needed in existing documents.

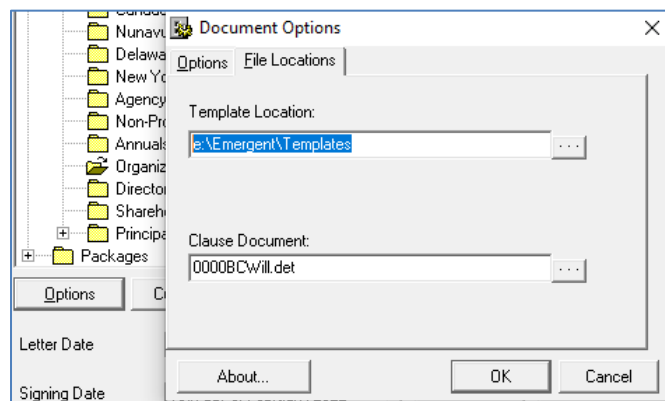
Determine the name of the existing template

Click on the **Create Document** button from any record to open the Documents window. To determine the name of the existing template, hover over the document you want to edit, the yellow note will have the template name at the end of the line.



Open the **Templates Folder**

All templates are located in one folder. Open the templates folder to access the documents by clicking on the **Options** button and **File Location** Tab. Highlight and copy the Folder address. Next go to **Start > Run** or open File Explorer and paste the Folder Address and click **OK**. This will open the Template Folder.



Make a backup of the template you are about to change

When making a number of changes to a template, it is a good idea to make a backup copy before beginning. This will allow you to restore the original template if unexpected errors arise. One way of making a backup of a file is to right click on it and choose **Copy** and then right click anywhere in the **same** folder other than on a document and choose **Paste**. This will create "name - copy" of the file.

Make the required changes to the template and **Save**. You can change any part of the template, however, **do not make changes to the merge fields**. They are the values found between the markings <<●>>. These are the fields that will populate the information from the database. You can remove them or move them within the document. **Do not add, remove or change any section breaks**, as section breaks contain critical information for the actions of the Template.

Test your Template

It is important to always test the Template after changes were made. Merge it and check for the expected changes. If the Template breaks, simply restore the backed up copy by deleting the broken template document and renaming the copy with the original file name.



Packages

Packages are a combination of documents and reports bundled together to create one comprehensive item. An Organization Package can include Directors Resolutions, Shareholders Resolutions, By Laws, Share Certificates and Directors, Officers and Shareholders Registers as well as the Reporting Letter.

Custom Packages can be setup through **Tools > Data Maintenance > Document > Packages**. A Package is made up of the following Items.

Package ID – This is a unique number that is assigned to the package. All documents and reports in this package must have the same number.

Package Description – This is the name of the package that the Users will see. All documents and reports in this package must have the same Package Description.

Jurisdiction ID – Contents of the package can be included or excluded based on their Jurisdiction. A Jurisdiction ID of 0 means that this document or report will be included regardless of its home Jurisdiction.

NOTE: The Jurisdiction ID will not filter content within a document or a report, it is only used to determine if the item should be included

Jurisdiction ID	Jurisdiction
1	Alberta
2	British Columbia
3	Canada
4	Manitoba
5	New Brunswick
6	Newfoundland
7	Northwest Territories
8	Nova Scotia
9	Ontario
10	Prince Edward Island
11	Quebec
12	Saskatchewan
13	Yukon
14	Nunavut

Type – This column is based on a query type to populate the document. This type should match the related column in the document table or the docType property of the document. Most documents that are not directly related to Directors, Officers or Share Transactions can be a Type of 10000. For Reports, the Type must match the type number in the reports table below.

Template Name – This is the exact name of the Template. For Documents, it must include the extension. For Reports, no extension is required.

Template – This is the name of the document the User would see if they ran this document independently of the package.

Order – This Column determines the order of the document or report within the package. An item with 1 would appear first in the package. The Sort items should be unique within the package group.



IsDocument – This column determines if the item is a document or a report. -1 is a document and 0 is a report.

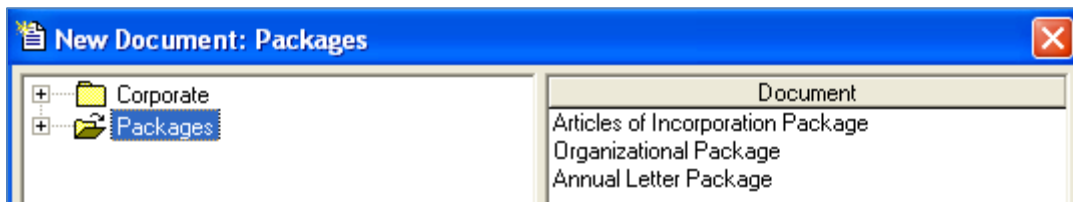
The number and type of Documents that can be included in the package is unlimited. The reports can be selected from the following:

Type	Template Name	Template Description
1	Corporate Information Sheet - Current	Corporate Information Sheet –
17	Shareholders' Register	Shareholders' Register
27	Officers' Register	Officers' Register
28	Directors' Register	Directors' Register

The resulting package will appear as the following.

Document Packages							
Package ID	Package Description	Jurisdiction ID	Type	Template Name	Template Description	Order	Is Document
17	Annual Letter Package	0	10000	0010AnnualLetter.det	Annual Letter	1	-1
17	Annual Letter Package	0	1	Corporate Information Sheet	Corporate Information Sheet	2	0

Once a custom group has been created, it can be selected from create document icon under the Packages Folder.



The resulting package will be one Word document allowing for quick review, tasking and printing.

There are special features for Documents with a sort Order of 1. All other documents in the package will have the formatting of this document. It is important to have headers, footers and page margins correct for the first document to ensure proper formatting.

Placing Firm headers and footers on Reports - All reports in a package can have headers or footers appear on them. For this feature to appear, the first document of the package must be a Word Template, .dot or .det file. In this initial document, set up the second page header and footer. Check Different first page in the Layout tab if the header and footer of subsequent pages is to be different. Page numbering can also be produced to number every page in a Package.



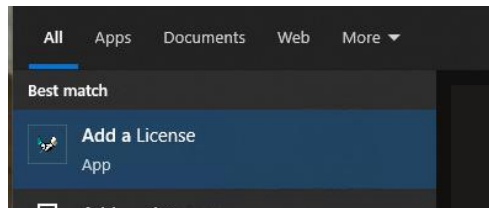
Chapter 2: IT Section



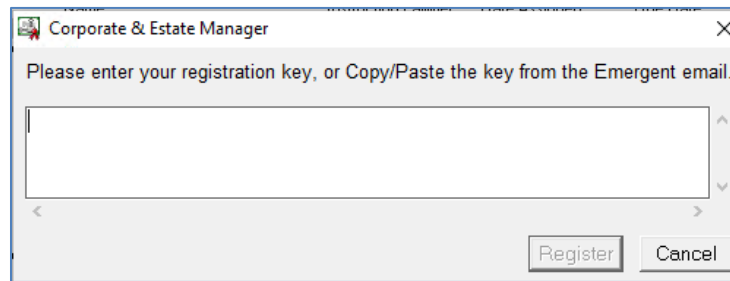
Licensing Corporate and Estate Manager

It will usually be the role of the Administrator or First User to license Corporate and Estate Manager ET during installation. Once the program is licensed, the Licence Key will be renewed annually.

To add the Licence Key, search from the Windows and select **Add a License**



Copy and Paste the Licence Key code as provided by Emergent Customer Care.



Database Administration

File Locations

Client file components will be installed by default to C:\Program Files\Emergent Technologies\Manager. Even though these files can be installed to any location, it is advised to keep them at the default.

Registries setting are found in: HKEY_LOCAL_MACHINE > SOFTWARE > Emergent Technologies.

Audit Trail

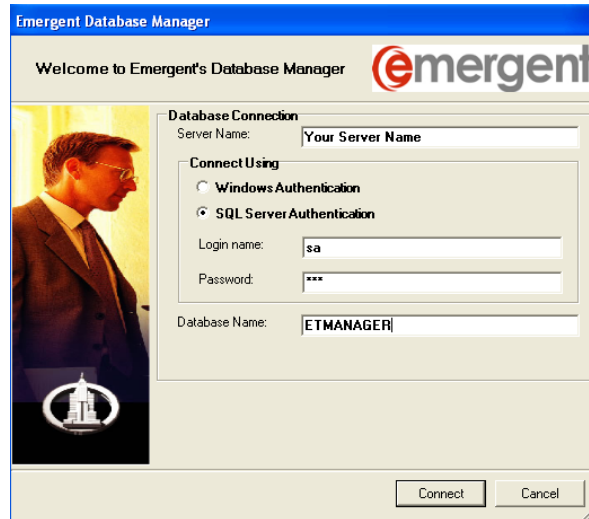
The Audit Trail on the Contact Card shows any changes made to the data, including date and User.

Description	Old Value	New Value	Updated By
Contact Added	43042020		sa
Contact Address Added	43042020		sa
Address line 1		33 Hippo Way, 200,	sa
City		43042020, onto	sa
State or Province		ON	sa
Postal Code		M3J K3K	sa
Street Number		33	sa
Street Name		Hippo Way	sa
Suite Number		200	sa

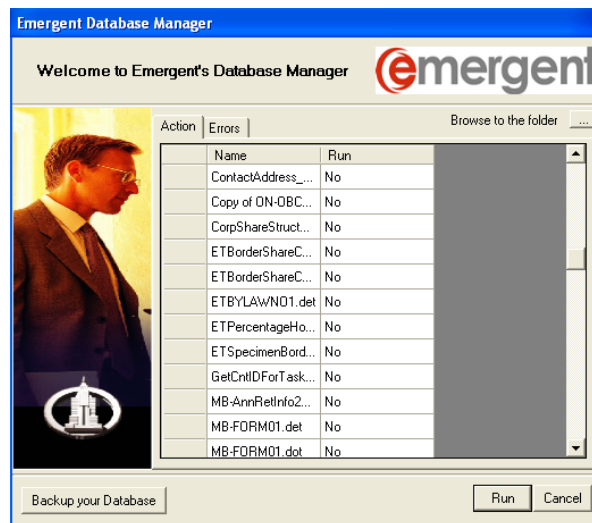


Emergent Database Manager

The Emergent Database Manager allow the administer an efficient way to apply database upgrades, Update Forms and Precedents, run custom scripts and backups directly to the database. Connect to the database with a secure log in window.



Then choose any of the options to maintain the database:



Back up your database before beginning any update process by selecting the Backup your Database button. Once done, an Operation Completed message will appear. You can then update your database.

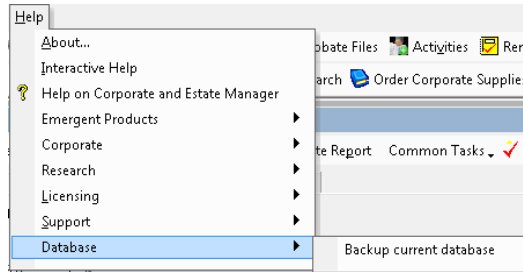
Browse to the folder where the update files are located. You can place all of your update scripts and new templates in one folder and select it. Database Manager will update the database and transfer your scripts to your templates folder

Click the Run Button. Once complete, each task will be identified as having been completed.



Express Database Backup

The Corporate and Estates ET database can now be backed up by anyone at anytime from within the program. Select **Help > Database > Backup current database**. This will create a file called ETManager.BAK located in the default backup location of your SQL server or MSDE installation

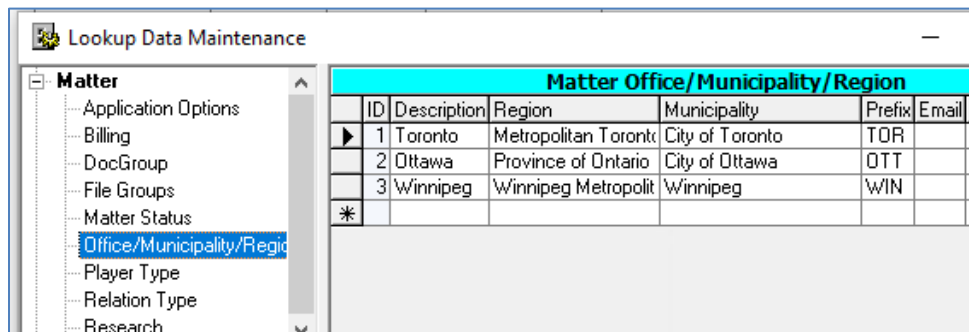


IMPORTANT! This backup process overwrites the previous backup and only the latest backup remains. The backed up file is not permanently saved. It is advised that the ETMANAGER.bak file be moved to a permanent backup media.

Support for Multiple Offices of the same firm:

If the database is being shared by multiple office locations of the same firm, individual files can be associated with a specific office.

To list multiple offices, go to **Tools > Options > Data Maintenance > Matter > Office/Municipality/Region**.



Enter the Following information:

- The Office City in the Description field.
- The Region and Municipality
- The Short Form Description of the office. This value will be used to identify which office a corporate record is stored within the firm. For example, TOR-159 means the minute book is in box # 159 in the Toronto Office.

Once the Offices are set up, the office address needs to be associated with the office.

Open the Our Firm Contact and enter the address on the main screen and additional addresses tab. At the bottom of the address page, there is a drop down called office. Select the office that this address belongs to. The Mailing Address on the General Tab will be the "local" address.



The 'Address Details' dialog box contains the following fields and controls:

- Street/Avenue/Boulevard/Drive...
 - Number: 123
 - Name: Main Street
- Suite/Apt: [Empty]
- P.O. Box: [Empty]
- Address: 123 Main Street
- Department: [Empty]
- City: Toronto (dropdown)
- State/Prov.: Ontario (dropdown)
- Country: Canada (dropdown)
- Office: Toronto (dropdown menu open, showing options: Toronto, Ottawa, Toronto, Winnipeg)
- Postal Code: M4E 1E7
- Look-up button
- Search Address, Links, OK, Cancel buttons

The 'Contact - Smith & Smythe' record view includes a toolbar with 'Save and Close', 'Copy Contact', 'Copy', 'Refresh', 'Delete', and 'Correspond' buttons. Below the toolbar are tabs for 'General', 'Other Addresses', 'Details', 'Documents', 'Relations', 'Audit Trail', and 'Social Networking'. A 'New Address' and 'Find' button are located above the 'Additional Addresses' table.

Additional Addresses				
	Full address of Contact	Default	Type	Effect
▶	246 Central Street, Ottawa, ON, K0K E3R, Canada		Mailing	
	2835 Pembina Road, Winnipeg, MB, D92 F9E, Canada		Mailing	

When creating a new file, the Office will be selected on the Administration Tabs of records, as well as the Registered Office for Corporate records.