

Installing and Preparing PCLaw®

PCLaw 12 New Certification Training

Virtual Training - Lesson 1



**Business of Law Software Solutions
Practice Management**

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Introduction

About PCLaw CIC Certification

Welcome to the PCLaw Certified Independent Consultant Certification course.

A Certified Independent Consultant is a solutions provider, representing a single or a broad range of Practice Management software products, developed to meet the needs of solo practitioners to large law firms.

All consultants certified through LexisNexis are required to attend regular training classes and pass rigorous exams for the products on which they are certified. Upon completion of the class and passing the exams they earn the designation Certified Independent Consultant (CIC).

CICs provide varying levels of training, consulting, and support on a large combination of products including Juris, Time Matters, and PCLaw. Many CICs also provide networking, server support, and other collateral services.

Course Outline

This course is divided into 8 lessons, covering three mediums of delivery: On-Demand Training, Virtual Learning sessions, and classroom sessions. The lessons are as follows:

- PCLaw On-Demand Training (for review of PCLaw features)
- Just-in-Time Training - Installing PCLaw
- Virtual Learning 1 - Installing and Preparing PCLaw
- Virtual Learning 2 - Data Entry
- Virtual Learning 3 - Billing
- Virtual Learning 4 - Accounts Receivable/Template Editor
- Virtual Learning 5 - Front Office
- Virtual Learning 6 - Accounting
- Classroom Training - Becoming a CIC.

Exams

A passing grade of 85% is required on two examinations. The first, an Accounting exam, is required after the Virtual Learning 6 Accounting session. A second, general PCLaw knowledge exam is required after the Classroom Training - Becoming a CIC session. Both exams must be completed successfully prior to certification being awarded. If needed, there is a second exam that may be taken if a passing score is not achieved on the first exam.

Exercises

At the end of each Virtual Learning class, you are given exercises to complete. The exercises consist of multiple tasks, the first of which is reviewed in the following Virtual Learning class. All tasks from the six exercises form a lab, where you will present to the rest of your class on the second day of the classroom sessions.

As part of the exercise/lab assignment, you are required to create a new install of PCLaw, perform the requested data entry, and create a backup of your PCLaw data. You are to copy the backup .PLA file to a removable media or CD, and restore and attach to the backup file as part of a classroom exercise.

Presentation of Material

This course assumes you already have a working knowledge of PCLaw. Therefore basic options, functionality, and data entry are not covered, and are the responsibility of the CIC candidate.

The majority of significant modules, features, and windows are covered in this course. At minimum, a description is provided for the item, but up to three additional layers of material may be provided for a topic. They are:

- **What You Should Know** - Highlights significant options/parameters/techniques for the topic.
- **Behind the Scenes** - Describes the data entry flow, and its affect on the journals, general ledger, and data files, where applicable.
- **Troubleshooting** - Provides procedures and techniques for common client issues.

Behind the Scenes

Behind the Scenes includes a layperson's knowledge of the PCLaw database, it is provided only for the benefit of understanding how PCLaw works in terms of data entry, reporting, and accounting. This information is not intended, and is intentionally insufficient for the purposes of editing the PCLaw database. Any procedure involving PCLaw data files should only be done by PCLaw Technical Support. Independent manipulation of data files may result in support being denied to the firm. Questions concerning PCLaw database files are not included on the CIC Certification exam, and data file knowledge is not required for CIC Certification. However, questions on the PCLaw directory structure, as presented in both Virtual Learning 1 - Installation/Preparation and Virtual Learning 5 - Front Office, are included on the exam.

Troubleshooting

Although common troubleshooting scenarios are provided, they are by no means exhaustive. Other troubleshooting recourses may be found in the CIC Forum, Practice Management Support Center, and communicating with other CICs, or 2nd Level Support. These venues are discussed more thoroughly in the Classroom training session.

Additional CIC Training Available

As extensive as the CIC course is, it cannot cover all the components and levels of complexity of PCLaw.

As a result, additional training material is available on the LNU website. Courses are available both on the client, and the CIC level.

To register for the courses, log on to the LNU website at <http://www.lexisnexis.com/university/>.

Preparing PCLaw

Overview

There is a natural order for installing PCLaw, setting up the PCLaw universe, and performing data entry for the first time entry to billing, to receiving payment from the client.

The first question that you must determine for the new PCLaw client, is the point of launch.

Is this a brand new law firm with no previous history or is this an existing law firm with existing clients and existing data? Or it could be something in between, perhaps the law firm is a 'split', that is, it is branching off from another firm. Or it could be an existing law firm, that would like to bring over none or only selected data from their previous accounting system.

Does the client wish to install PCLaw on a Windows network, or PCLaw on an SQL server?

And what do they want to use PCLaw for? Is it just for time and billing, or does the firm want to use the complete PCLaw accounting package? Are they using a separate Front Office application, such as Time Matters, or do they want to employ the PCLaw Calendar, Contact, Document, Phone Call, and Safe Custody management? Is this a stand alone or network installation? Does the firm want to exchange information with third party applications?

This may seem like a lot of questions, but the information you gather from these types of questions can only assist you in making the correct decisions when installing and setting up PCLaw for your clients.

Objectives

Upon Completion of the Virtual Learning 1 Installing and Preparing PCLaw lesson, you will be able to:

- Recognize the requirements and resulting data structure for installing PCLaw on both the server and workstation.
- Follow the natural order of entry for preparing a PCLaw set of books.
- Create and maintain clients and matters in PCLaw.

PCLaw Editions

Prior to version 10, PCLaw was available in two editions, PCLaw and PCLaw Pro. PCLaw was geared to smaller law firms, and contained fewer features than the Pro edition, particularly Productivity reports, Client functionality, and matter introducing lawyers, to name some of the Pro only features.

For PCLaw versions 10 through 12, all features are available to all users, as PCLaw Pro. Users can opt for either a C-tree and SQL data structure.

C-tree is a multipurpose database technology based on the C program language families. PCLaw C-tree database may be installed on Windows based computers without any prior preparation. C-tree is typically used by smaller law firms who do not anticipate maintaining a large database for their PCLaw set of books.

PCLaw using SQL technology provides the firm with the scalability, flexibility, and reliability of a SQL database that uses client/server technology. SQL was originally recommended for larger law firms of 10 users or more. However, the availability and ease of installation of available SQL server applications has placed this database option within the reach of all PCLaw customers.

PCLaw actively supports Microsoft SQL Server 2000, 2005, 2008, as well as Microsoft SQL Express 2005 and 2008. One of these applications must be installed on the server. PCLaw 12 supports SQL Server 2012; PCLaw 11 provides only limited support of SQL Server 2012; whereas PCLaw 10 is not supported.

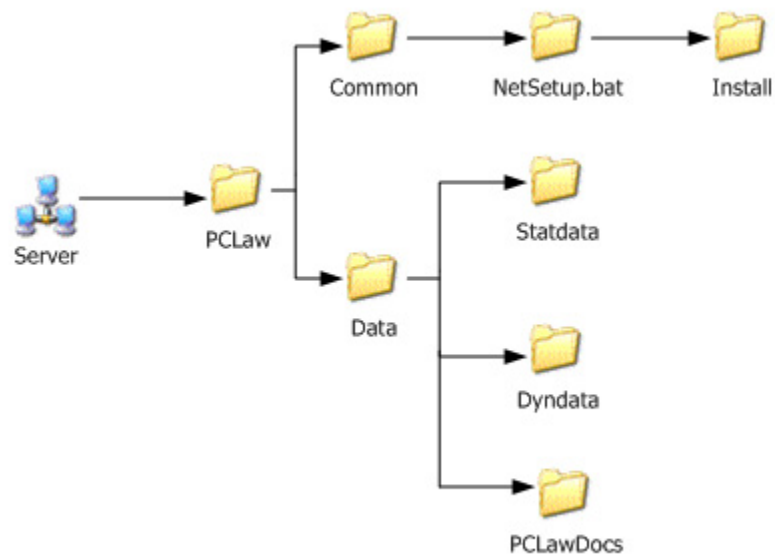
PCLaw workstations attached to the server must have SQL Client installed. Depending on the operating system on the workstation, SQL Client is already included as part of Windows XP, Vista, and 7. If SQL Client is not present on the workstation, it can be installed as part of the PCLaw installation on the workstation. The latest version of SQL client may also be downloaded from the Internet as Microsoft Data Access Components (MDAC).

Database Structure - C-tree

PCLaw has separate directory structures for the server and the workstation.

Server

Installed on the server are shared files to which every PCLaw user requires access. These include the PCLaw data files, electronic documentation and precedents stored through PCLaw using Document Manager, and installation files used to install PCLaw on all workstations.



PCLaw directory structure for the server

The two main PCLaw directories on the server are Common and Data. These directories should exist on the same level, but are not required to reside in the same folder. In the above diagram, both directories exist within the PCLaw folder. The name for the PCLaw folder itself is determined by the user. This folder may sit on the root of a server drive or several levels down, as also determined by the user.

Common Folder

The Common folder uses the name assigned to by PCLaw, and this should not be changed. This folder contains several important components of PCLaw, including the conversion executables and the PCLaw tutorial files. Both items are accessible within PCLaw, and therefore do not need to be accessed by browsing through the directory.



Warning: The PCLaw Common folder name should not be changed.

The Installation files within the Common folder are different. When PCLaw is first installed on the network, the Common and Data folder locations are set. Any additional PCLaw installations on the network should not be performed from the PCLaw CD or downloaded setup file, but by running the Setup executable within the Install folder. This ensures that the same directory structure is employed on each workstation, and that duplicate Common and Data folders are not created.

To run the Setup executable from the workstation, browse to the location of the Common > NetSetup.bat > Install folder on the server, and double click the Setup icon. Best practices dictate that each workstation should have a mapped drive to the PCLaw server, and that the drive letter should be the same for each workstation.

For firms with multiple sets of books, only one Common folder is necessary to serve all the PCLaw databases.

Data Folder

Data is the default name that PCLaw assigns the folder that contains the Dyndata and Statdata directory. The folder name may vary on the discretion of the client. If the firm is running multiple sets of books, there may be multiple Data folders, each with a unique name, such as Data 1, Data 2, Data 3, or perhaps reflecting the Firm Names assigned to each set of books. Multiple Data folders do not have to reside in the same directory, but best practices dictate advantages to maintaining a uniform data structure, for purposes of support or ensuring all PCLaw databases are included when performing an external backup.

Multiple folders are contained within the parent Data folder, with the three most significant folders containing the Dynamic and Static data, and the firm's electronic documents.

The Dyndata folder contains data files that are appended by daily data entry, these include the time, banking, allocation, and invoice data files.

Statdata contains data files that are not commonly appended in PCLaw, such as the list for lawyers, general ledger, bank accounts, and pop up help codes.

The Dyndata and Statdata folders must remain together and within the Data folder.

The PCLawDocs folder may or may not exist, depending on whether Document Manager is enabled in the set of books. The folder may remain in the Data folder, but is commonly placed elsewhere on the firm's network. This folder contains several significant sub-directories. The PCLawDocs folder and directory structure is



Note: For new installs of PCLaw version 11, PCLaw Front Office modules, including Document Manager is enabled by default.

discussed in more detail in the Virtual Learning 5 Front Office session.

The names of the Dyndata, StatData, and PCLawDocs folders are set by PCLaw and cannot be changed.

Workstation

PCLaw program files are commonly installed on the workstation.



PCLaw directory structure for the workstation

The diagram above displays the default directory tree and names created when installing PCLaw on the workstation. If other LexisNexis products are installed on this workstation, the LexisNexis folder is already present. If not, PCLaw creates it.

Within this folder, a PCLaw folder is created where the PCLaw program files are stored, including the PCLaw executable to launch PCLaw. Use this executable to create a PCLaw icon on the desktop, if the icon placed on the desktop during installation is mistakenly deleted.

Significant folders placed within the PCLaw parent directory include LocalData, which houses the experimental set of books, the WSpell and UserDic folders, which contains the spell checker and custom dictionary, the Help folder containing the Help files, and files for linking PCLaw with locally installed applications.

A client may opt to install PCLaw in a location other than Program Files, but there is not a need to re-label any file folders.

PCLaw.cfg File and Registry

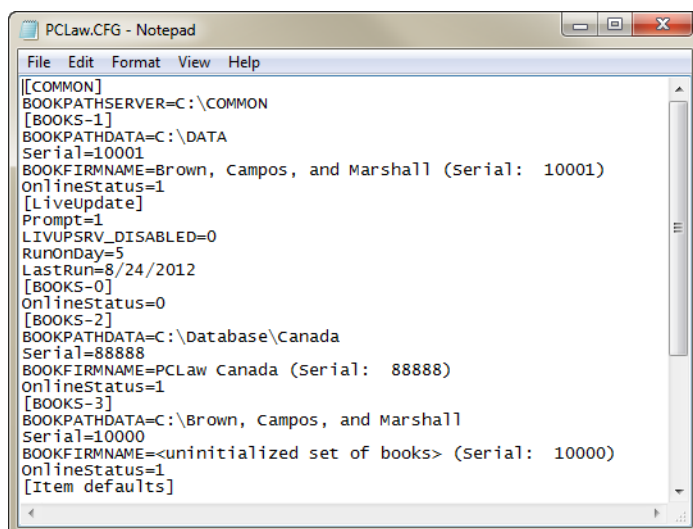
The PCLaw Configuration file contains the destination paths for the Data and Common folder. This file was added to PCLaw as of version 8.10. Prior to 8.10, information from this file was held in the Registry of the workstation, under the HKEY_Current_Users key, and before that, HKEY_Local_Machine.

PCLaw.cfg is located on each workstation in the *Program Files > LexisNexis > PCLaw > LocalData* directory. There is only one file per workstation, regardless of the number of PCLaw books attached on that workstation. Information for each book is included under the heading [Books - #] where # represents where set of books appears on the PCLaw Login window.

Included in the PCLaw.cfg file are:

- **BookPathServer** - Location of the PCLaw Common folder.
- **BookPathData** - Location of the PCLaw Data folder.
- **Serial** - The serial number for the set of books.
- **BookFirmName** - Your Firm Name.
- **Online Status** - Enables or disables the set of books.

Use either Notepad or WordPad to edit the PCLaw.cfg file. Best practices dictate that you save a copy of the PCLaw.cfg file before editing its contents.



```

PCLaw.CFG - Notepad
File Edit Format View Help
[[COMMON]
BOOKPATHSERVER=C:\COMMON
[BOOKS-1]
BOOKPATHDATA=C:\DATA
Serial=10001
BOOKFIRMNAME=Brown, Campos, and Marshall (Serial: 10001)
OnlineStatus=1
[LiveUpdate]
Prompt=1
LIVUPSRV_DISABLED=0
RunOnDay=5
LastRun=8/24/2012
[BOOKS-0]
OnlineStatus=0
[BOOKS-2]
BOOKPATHDATA=C:\Database\Canada
Serial=88888
BOOKFIRMNAME=PCLaw Canada (Serial: 88888)
OnlineStatus=1
[BOOKS-3]
BOOKPATHDATA=C:\Brown, Campos, and Marshall
Serial=10000
BOOKFIRMNAME=<uninitialized set of books> (Serial: 10000)
OnlineStatus=1
[Item defaults]

```

PCLaw Configuration file for multiple sets of books

Common Troubleshooting

A newer version of the software is required to access the data

This message occurs on one or more workstations after updating PCLaw to the latest version. Repeated occurrences of this message indicates an installation loop.

When PCLaw is updated on the server, contents of the server's Data and Common folders reflect the newer version. The first time PCLaw is opened on a workstation, the user is prompted to update. The user only needs to click OK on the prompt, and the update proceeds automatically, accessing the Common folder from the server. The user may then launch PCLaw.

If PCLaw was not initially installed on the workstation using the Install file on the server, a separate Common folder is created on the workstation. This folder is not updated when the installation files on the server are updated. Therefore, the workstation reinstalls the earlier version of PCLaw contained on the Workstation Common

folder, with the prompt reappearing after the update. Repeated attempts to update produce the same results, thus resulting in the loop.

To resolve this issue, BookPathServer in the PCLaw.cfg file for the workstation must be adjusted to show the correct location of the Common file on the server. Once done, perform the update one more time.

Data entry by one user cannot be seen from other workstations

This issue is similar to the installation loop, only it involves the BookPathData value in PCLaw.cfg. The workstation is looking at a false or non-current database, therefore any data entry originating from the workstation is not being posted to the correct database.

This issue results from an improper installation of PCLaw on the workstation.

Correct the path to the Data directory in PCLaw.cfg. All data entry performed on this workstation needs to be re-entered.

The workstation reboots during the installation or update of PCLaw

This issue may occur if the firm's anti-virus software is blocking PCLaw from running certain files.

If this is the initial installation of PCLaw, or if PCLaw is being updated and the firm is not running the Lexis Credit Card Processing application (LCCP), then the anti-virus program may be temporarily disabled to allow the installation.

If the firm is running LCCP, then a more permanent solution is to configure the anti-virus application to allow the copying of the common and program files.

Database Structure - SQL

At first appearances, the data structure between the C-Tree and SQL additions are similar, as both maintain Dyndata and Statdata directories within the Data parent directory.

However, with C-Tree, the complete PCLaw database is contained within Dyndata and Statdata.

With SQL, the entire set of data is contained within the PCLawDB_#####.MDF file, where ##### represents the serial number. A second file, PCLawDB_#####log.LDF is the transaction log. Both files are required in order to access the PCLaw data, and they must reside within the same directory.

These files are completely managed by SQL. Any required procedures, such as creating login names and passwords or attaching data to the SQL server, should be performed using tools supplied by the SQL server software, including Enterprise Manager, Management Studio, or Management Studio Express.

The Dyndata and Statdata directories contain the remaining files where data storage is not required. These include geninfo.32, invoice images, templates, terminology files, and custom tab information.

The remaining directory structure is still intact. The installation files are stored in the Common folder. For firms using Document Manager, documents are still stored within the PCLawDocs folder.

SQL client installed on the workstations does not affect the PCLaw program files directory structure.

System Requirements

PCLaw is supported on a properly configured Microsoft network. PCLaw recommends having a dedicated database server.

- SQL Server 2000/SQL Server 2005/SQL Server 2008 or Microsoft SQL Express 2005/2008
- SQL Server 2012 for PCLaw 12
- Windows Server 2000/2003/2008
- Peer to Peer, Workgroup, and Client Server configurations are all supported.

	PCLaw Workstation	PCLaw Server
Processor Minimum	Pentium 4 1 GHz	Pentium 4 3.2 GHz
Processor Typical	Pentium 4 2 GHz	Core 2 Duo/Dual Core, 2.0 GHz
RAM Minimum	512 MB	1 GB
RAM Typical	1 GB	2GB
Hard Disk Minimum	250 MB	2GB

	PCLaw Workstation	PCLaw Server
Hard Disk Typical	500 MB	4GB
Operating System	Windows 2003 / XP / Vista / 7 (1)	Windows 2005 Server / 2008 Server
Software	Professional SQL Edition: Microsoft SQL Express 2005 or SQL Express 2008 (25 users or fewer), SQL Server 2005, SQL Server 2008	
Screen Resolution	1024x768 pixels at 32-bit color resolution	
Network Minimum	100 Base-T Ethernet (2)	
Network Typical	100 Base-T Ethernet (3)	

PCLaw System Requirements

(1) Because of limitations placed on home editions by Microsoft, home editions of Windows XP, Windows Vista, and Windows 7 are not recommended and will not be supported as a server platform or as a client in an office using a domain controller. Citrix, Linux, and Mac operating systems are not tested nor supported. PCLaw is no longer developed to run on Windows 98, ME, NT, or 2000 operating systems, as these systems are no longer supported by Microsoft.

(2) Peer-to-peer and wireless networks are not recommended nor supported. Virtual servers are not recommended nor supported.

(3) Typical requirements depend upon the number of concurrent servers and the number of enterprise-level applications installed on the server.

Purchasing/Downloading PCLaw

When a client purchases PCLaw, renews their maintenance plan, or adds to their license or existing product, they receive two e-mails. The first is a receipt of purchase. The second contains the Product License Key and download information.

Subject: FW: Your LexisNexis Product Keys (Practice Management Id # 0099633236PCLAW01)

Your LexisNexis® Practice Management Id # **0099633236PCLAW01**

IMPORTANT NOTE: If you are not the person responsible for the installation of your firm's software, please forward this email accordingly. We record this message, as it contains the product key(s) required for the installation of your LexisNexis Practice Management product(s).

You are receiving this email because you have either:

- Purchased a LexisNexis Practice Management product
- Renewed your Annual Maintenance Plan (AMP) subscription
- Added users to your account
- Requested your product keys

Click this link to download your LexisNexis Practice Management software:

<https://pmservices.lexisnexis.com/lnelivery/default.aspx?token=f61042352f3a9872bad47ed39147df0311>

Product Purchases

Product Name: PCLaw 12.0
 Product Key: **68823-2vvn7-1Lqwg-1x4wu-245m3-00000-bgb9b-9fqyy**
 Part Description: **9781422423066**
 Users: **1**

Product Name: PCLaw Maintenance 1.0
 Part Description: **9781422423158**
 Users: **1**
 Expiration Date: **Jun 30, 2013**

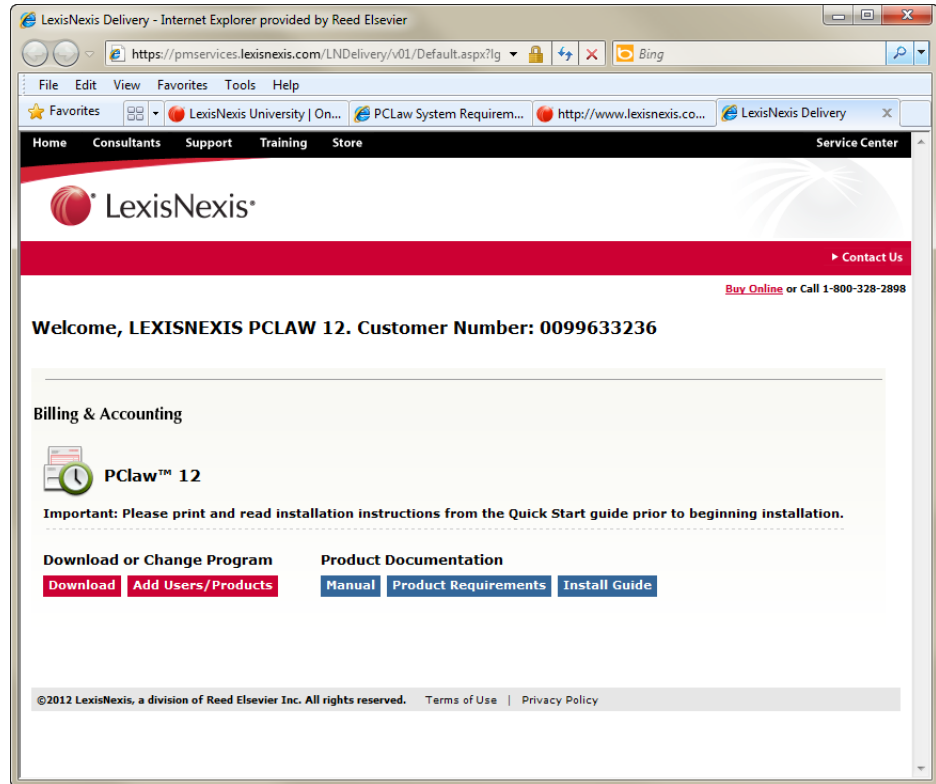
Helpful Resources

- [Get training at LexisNexis® University](#) (Anytime Training is available to customers with a current AMP subscription at no additional charge)
- [Get technical help at the LexisNexis® Support Center](#) or call 800-387-9785 (you will need to enter the first ten digits of your LexisNexis Practice)
- Contact your LexisNexis Practice Management Account Manager at 888-488-3056
- [Find a LexisNexis® Certified Independent Consultant](#)
- [Visit the LexisNexis Practice Management Website](#)

Please do not reply to this message. It was sent from a notification-only address that cannot accept incoming email.

Client Product Key e-mail

To download PCLaw, click the Download link within the email, to advance to the client's customized Delivery page.



LN Delivery page

In addition to being able to download the PCLaw product, and update license information, the firm has access to vital information for installing and setting up PCLaw, including System Requirements, and the Quick Start and Install guides.

Clicking the Download button brings the user to the *Software Download > End User License Agreement*. The user must click the *I have read and agree with the license* link at the bottom of the page in order to proceed.

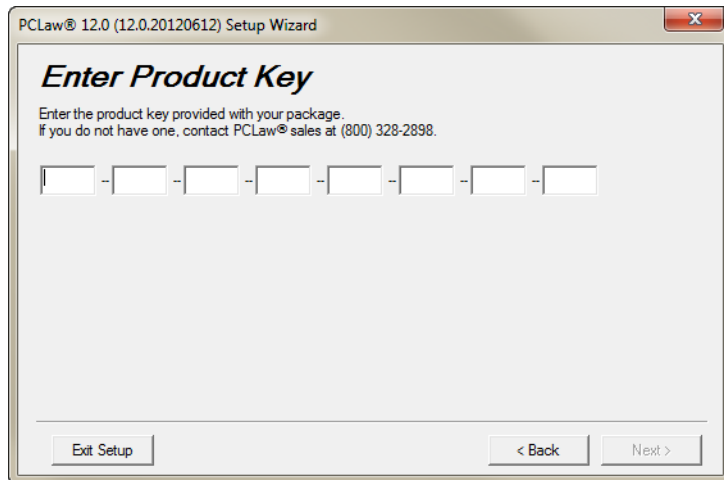
Before proceeding, all applications that link to PCLaw, including Microsoft Outlook, Internet Explorer, and Microsoft Word must be closed. The download proceeds automatically with the application edition that the firm has purchased.

After download, the PCLaw Installation wizard opens automatically.

Installing PCLaw on an SQL Server

Installing PCLaw on an SQL server may have two variances than installing PCLaw using the C-Tree database.

When first installing PCLaw on a brand new system or network, you are asked for a Product Key.



Product Key Window

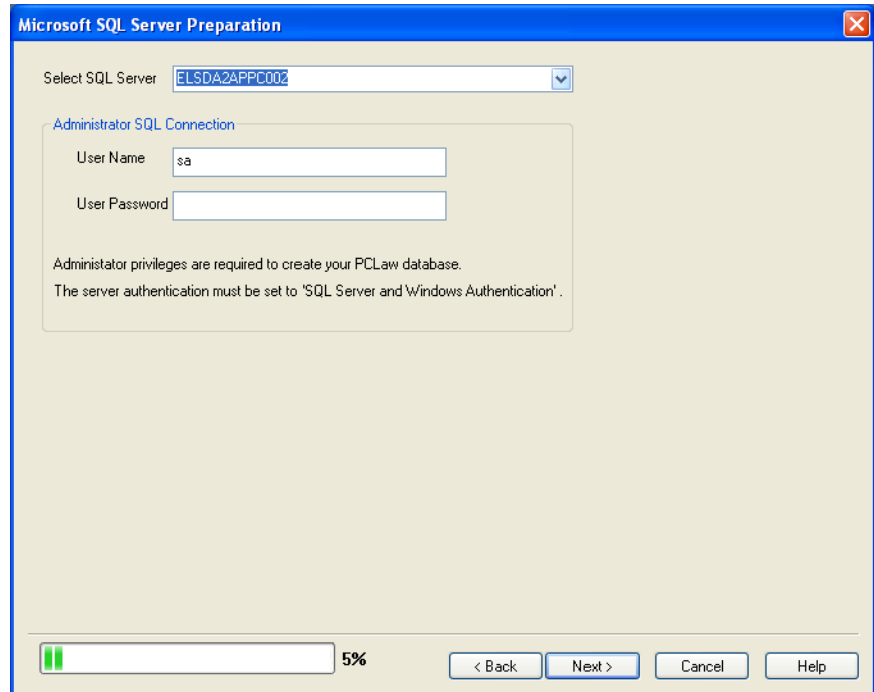
Coded within the product key is whether this set of books is a C-Tree or SQL install. After entering the product key, the installation of the PCLaw program files are completed, and the installation wizard reaches the book preparation stage.

At this stage, PCLaw searches for the SQL server. If one is not found, you are prompted. PCLaw provides SQL Server Express 2005 as part of its installation package.

Once the SQL Server application is installed, or if it was already installed, you are asked to select the SQL server. If there are more than one SQL server applications on your network, you can select the proper server from a drop-down list. The user name and password for the SQL server is required to enable connectivity.



Note: SQL Server Express should be installed prior to continuing with the PCLaw installation.

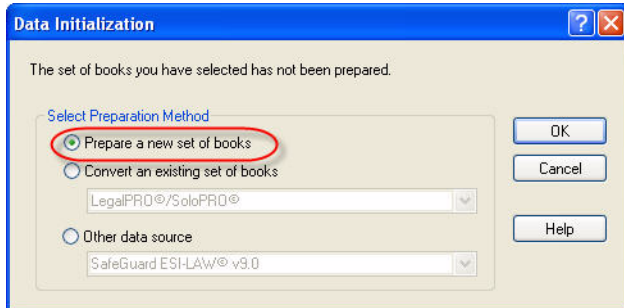


Microsoft SQL Server Preparation screen from the PCLaw installation wizard

Once the SQL server is selected, the book preparation procedure is identical to a PCLaw C-Tree installation, as demonstrated in the Installing PCLaw Just-in-Time training video that preceded this lesson.

New Installations

New installations of PCLaw require information to be entered manually into the application.



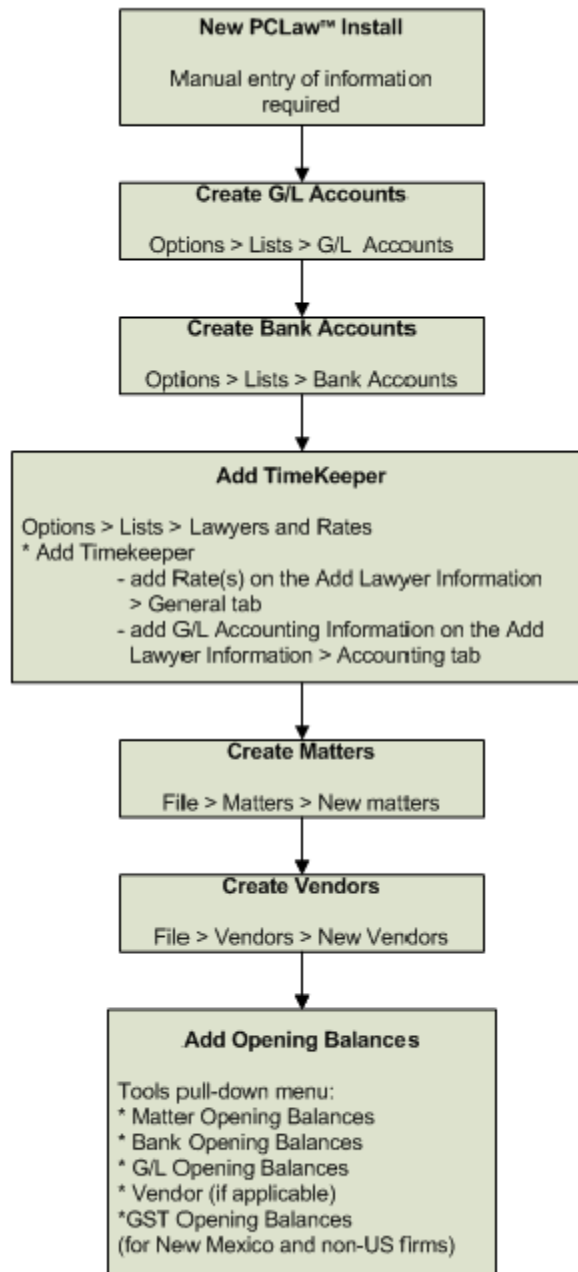
Data Initialization window

PCLaw provides a default list of general ledger accounts, a default general, petty cash, and trust bank account, lists of task, type of law, and explanation codes. However, other information, such as timekeepers, matters, and vendors need to be added. The existing lists in PCLaw may also need to be modified or appended.

Once the basic components are set up in PCLaw to store information, opening balances can be entered next. Opening balances comprise any time, billing, banking, or accounting entry that occurs prior to the PCLaw Start Date.

The PCLaw Start Date is the date when the PCLaw set of books formally begins. Any item or transaction that occurs after the start date is part of the firm's normal day to day data entry and should not be included as part of the opening balances.

Opening balances can be added directly from the Tools pull-down menu. For matters, there is also an Opening Balances tab in Matter Manager and on the New Matters window. Opening Balances windows are only available during the first open month. Once a month is closed in PCLaw, the firm is no longer able to enter opening balances.



Common Troubleshooting:

Opening Balances windows are not available

The firm has closed its first month, only to find that there are still more opening balances data that need to be added to PCLaw.

Reopen the closed month (*G/L > Reopen month*), then restart PCLaw. The Opening Balances windows will return after PCLaw is relaunched.

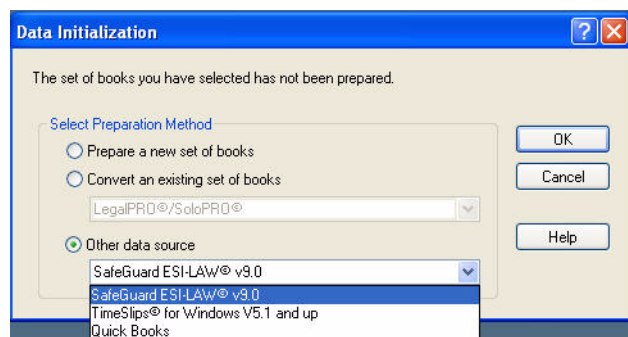
Converting an Existing Database

For firms coming from an existing data source, a conversion is required for importing the data into PCLaw. An initial data conversion can occur on three levels.

A self-conversion can be performed from within PCLaw for selected third party applications. These applications include:

- ESI-LAW
- Timeslips
- QuickBooks

These applications can be selected from the Data Initialization window which appear when opening PCLaw for the first time.



Data Initialization window

Self conversions do not require the assistance of PCLaw Technical Support, nor the Professional Services Conversion department.

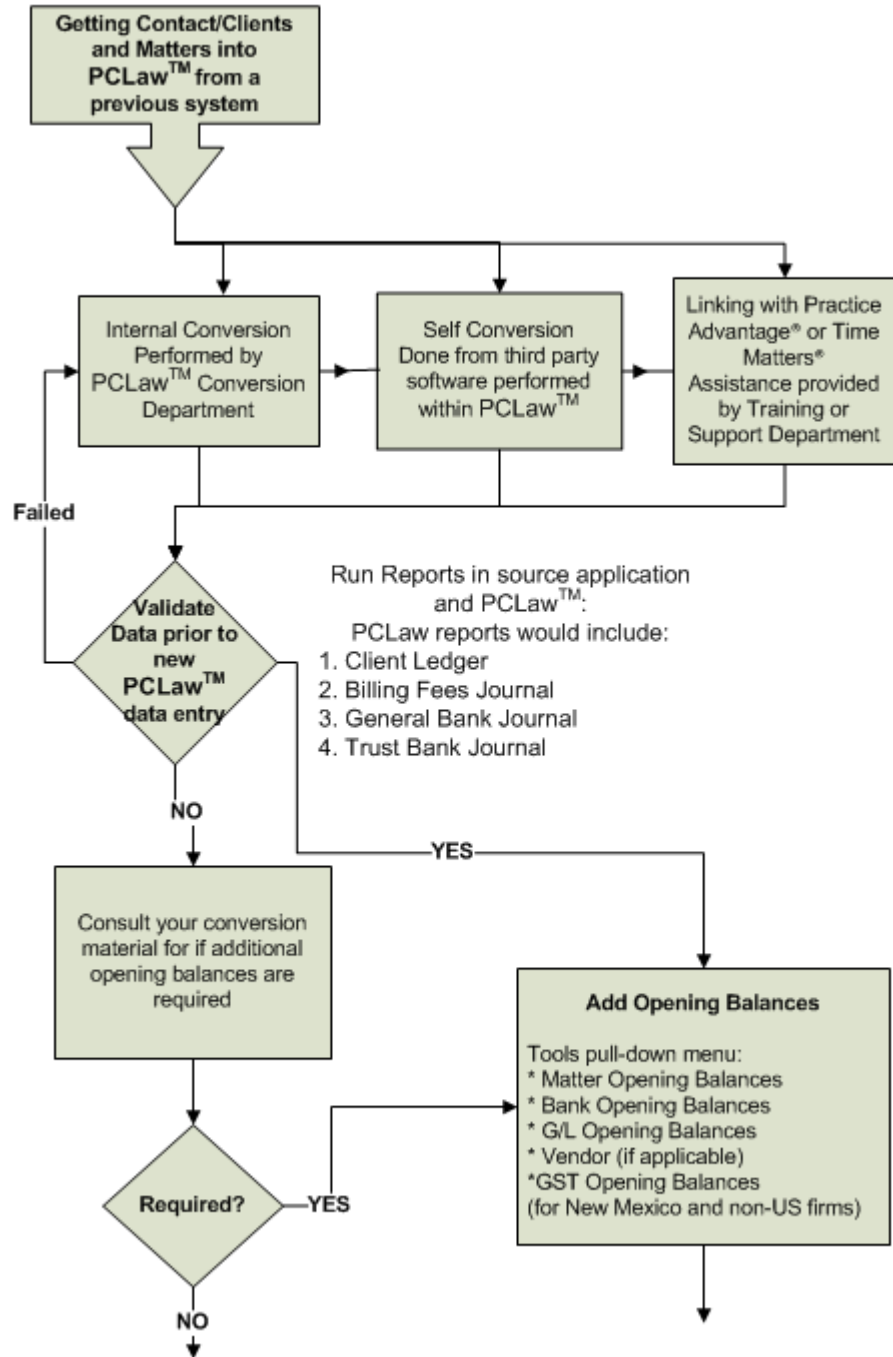
An assisted conversion may be performed if data is being brought over from a LexisNexis Front Office application such as Time Matters. PCLaw Technical Support can guide the user through this type of conversion.

Larger or more complex conversions can be performed through the Professional Services Conversion department for a charge. These conversions can include data splits and sourcing from third party applications where the conversion process cannot be automated.

Conversions from third party applications require the imported data to be validated by comparing the values in PCLaw to the source applications.

This involves running key PCLaw reports, including:

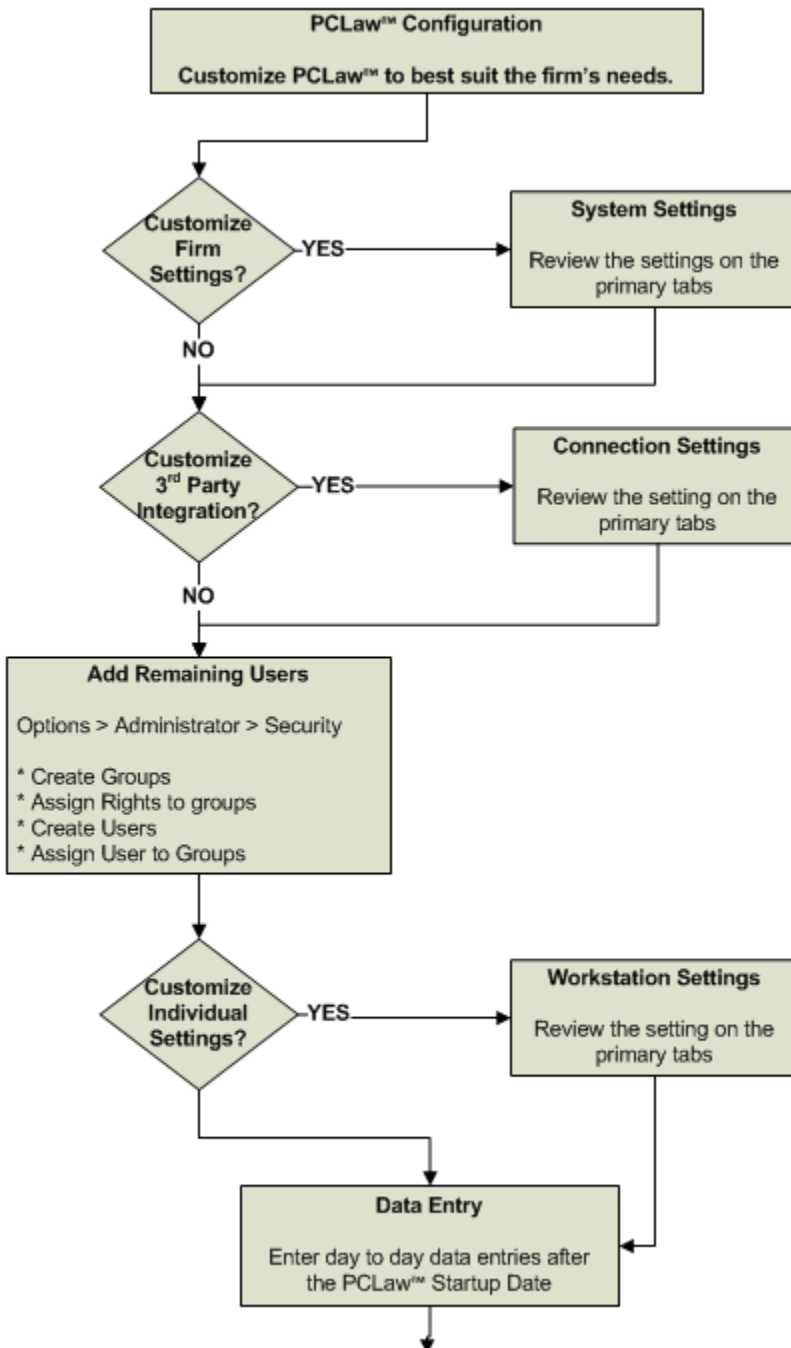
- Client Ledger
- Billing Fees Journal
- General Bank Journal
- Trust Bank Journal.



Depending on the type of conversion, opening balances may be required for matters, bank accounts, general ledgers, vendors, or value added tax.

Configuring PCLaw

PCLaw configuration can occur throughout the installation and setup process and beyond. Some System Settings defaults are selected within the Installation wizard, and other than the Firm name, may be changed at any time in PCLaw.



While the time line is not strict for reviewing and setting defaults in PCLaw, some options are best set prior to data entry, to both standardize data entry and save keystrokes.

System Settings

When a firm reviews and does an initial configuration of System Settings, is dependant on whether the PCLaw set of books is a new install, or is a converted data set from another accounting application.

For a new install, the firm may want to configure System Settings earlier in the time line. Particularly, to prepare the matter defaults on the Matter tab prior to entering matters into PCLaw.

A firm converting from an existing database may not have this option, as depending on the conversion routine, matters may already be in place in PCLaw prior to the Administrator first accessing the application.

For lesson cohesion, only the System Settings > Firm and Other tabs are discussed under the Preparing PCLaw topic while the remaining System Settings tabs are addressed, when the specific PCLaw module(s) that they affect are addressed. For instance, the Matter tab is described later in this Virtual Learning session under the Matters and Clients topic. The Data Entry, Billing, and Document tabs are described in upcoming Virtual Learning classes, with their respective topics.

Connection Settings

Connection Settings can be enabled at any point prior to the firm requiring the exchange of functionality between PCLaw and selected third party applications. It is also required in order to use PCLaw Mobility.

The Connection Settings and Internet Explorer tabs are included in the Data Entry PCLaw Virtual Learning session, while the Outlook tab is described in the Front Office Virtual Learning session.

Security

Setting up users and groups can happen at multiple points during the start up timeline. The PCLaw Administrator may not want all users to have access to the application while its basic components are still being prepared. However, for larger tasks, such as the inputting of matters, the Administrator will probably require some assistance, and thus will want to add specific users to PCLaw to help with this task. When the component and opening balance stages are completed, the Administrator will then want to add the

remaining users and groups, prior to commencing with day to day data entry.

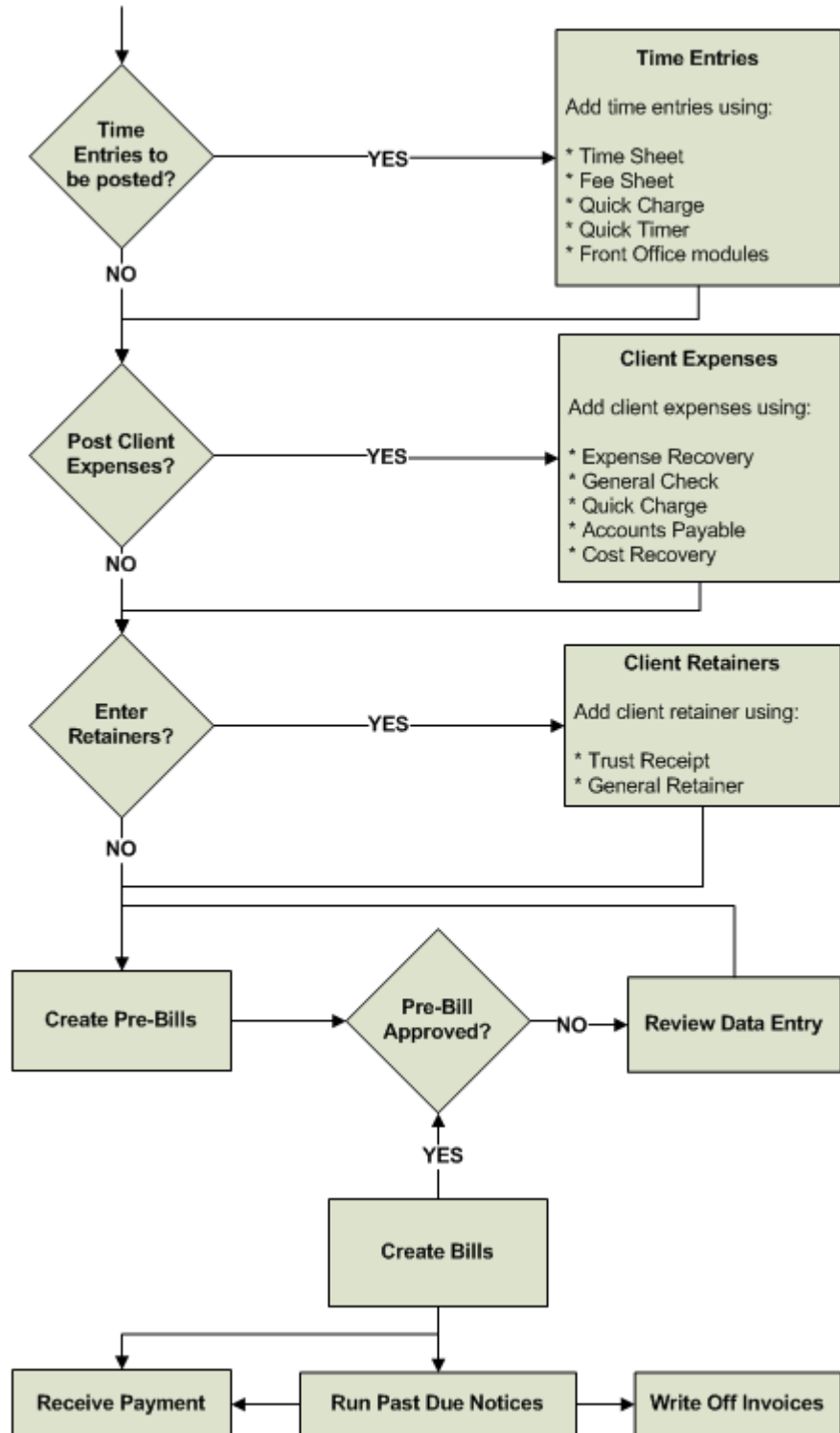
The creation of users and groups are described later in this Virtual Learning session while the Advanced tabs are described with the modules for which they are associated. Advanced Security Preferences, required for using PCLaw Mobility, is described with Mobility in the Classroom Training - Becoming a CIC lesson.

Workstation Settings

Since workstation settings are specific to the user's workstation, they are addressed after PCLaw is installed on the user's workstation, and the user is added to PCLaw Security. Workstation Settings can be configured by the individual user or by the Administrator on behalf of the user.

Data Entry

In general, data entry in PCLaw follows a natural order. This order is reflected in the upcoming Virtual Learning lessons.



Initial data entry involves the creation of time records, tracking expenses occurred by the firm on the client's behalf, and funds received from the client in anticipation of work being performed. These topics comprise the Virtual Learning 2 Data Entry session.

The Billing process includes the creation and review of pre-bills, any required changes to existing transactions, thus culminating in the final bill that is sent to the clients. These topics comprise the Virtual Learning 3 Billing session.

The post billing process includes receiving payment from the client, and processes to run should the client not pay initially, or not pay at all. These topics comprise the Virtual Learning 4 Accounts Receivable/Template Editor session.

Also in PCLaw there are processes that may not affect the Client Ledger, at least not directly, such as the Front Office modules in PCLaw included in the Virtual Learning 5 Front Office session, or entries that are accounting related but do not affect the client, such as maintaining and reconciling the general ledger, included in the Virtual Learning 6 Accounting session, and month and year end procedures, contained in the Classroom Training - Becoming a CIC lesson.

Releases

Periodically during the year, new updates for PCLaw become available. The updates may range in significance, from resolving specific issues within the software, to a complete version release, that includes new features and options.

There are 4 different release levels:

- Releases
- Point Releases
- Service Releases
- Hot Fixes

Releases

This is a major release containing new features in PCLaw. It is considered a marketing release. An example of a release is changing the PCLaw version from 11 to 12. A release also contains fixes for existing PCLaw features, but this is not the prime purpose for the release.

Point Releases

This is also a new feature oriented release, but the new features will not be as extensive as in a major version release. An example of a point release is changing the PCLaw version from 12 to 12.1. A point release also contains fixes for existing PCLaw components, but this is not the prime purpose for the release.

Service Releases

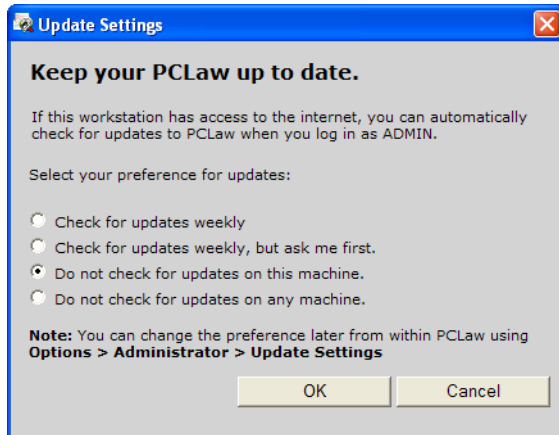
This is a maintenance oriented release, and does not as a rule, contain new features. A service release contains fixes for existing PCLaw components. Prior to 2010, a service release was designated by a letter after the point release, such as 10.1a. In 2010, and after, a service release is designated by the release number, such as SR1, SR2, etc. Therefore, a service release for 11.1 appears as 11.1 SR1.

Hot Fixes

A hot fix is a maintenance release targeted to fix a specific, chronic issue. This release does not contain any new features, and as a rule, does not contain any additional fixes for other PCLaw components. A hot fix does not change the service release number, only the build date following the SR number, on the *Help > About PCLaw* window.

Updating PCLaw

The PCLaw Administrator may be notified automatically should a PCLaw update become available by selecting Update Settings on the Options > Administrator pull-down menu.

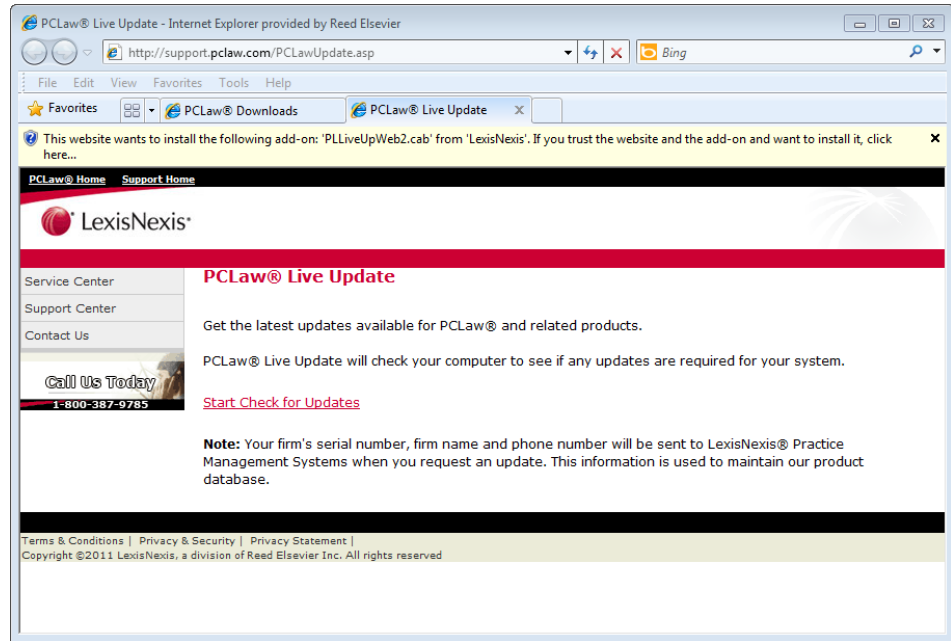


Update Settings window

PCLaw can:

- Automatically check for updates weekly.
- Check for updates weekly, on the approval of the administrator.
- Abstain from checking for updates on specific workstations. This is important if the Administrator does not want general users updating the software.
- Abstain from checking for updates entirely.

Updates can also be performed manually by selecting *Live Updates from Web* on the Help pull-down menu. On the Welcome to PCLaw Update Center page, click the *Start Check for Update* link to have PCLaw scan for newer versions of the client's existing software.



PCLaw Live Update page

The PCLaw download page can also be accessed directly at:

<http://PCLaw.com/techpage.htm>

Behind the Scenes:

It is common practice for Releases and Point Releases to not immediately update the client notification when a new version is added to the Download page. This is strictly to moderate the number of initial updates to the software. Client notification may be enabled within a week, and client entitlement emails are generally spaced out over the course of several weeks.

Basic PCLaw Settings

PCLaw has several modules to use for setting defaults on both the firm and individual level. System Settings determines the application's actions in specific situations on the firm level. Similarly, Workstation Settings perform the same task for the individual workstations. In addition, the Lists menu on the Options pull-down menu contains standardized codes to use in multiple PCLaw tasks.

There are dozens of tabs in System Settings and Workstation Settings, and codes on the Lists menu. This section highlights the tabs and codes necessary to begin the PCLaw set of books, both proceeding to the data entry process.

Firm Tab of System Settings

Options > System Settings > Firm Tab

The Firm tab holds the Firm Name, Address, Tax ID Number, and contact information, which appear by default on the bills, checks, and Past Due Notice templates. This information also appears on some reports within PCLaw.

All fields may be changed as required with the exception of the Firm Name. Once the Firm Name is set, it may only be changed by contacting PCLaw Technical Support. A fax request is required before any changes can be made.

System Settings

Past Due/Interest Memorized Transactions Check Pattern Front Office Research
Firm Other Data Entry Banking Tax Matter Billing

Firm Name: Brown, Campos and Marshall

Firm Address: 123 Commerce Valley Dr E

City: Markham

State: NC Zip Code: 12345

Country: United States

E-mail:

Web Site:

Federal Identification No.:

Numbers

Telephone:

Fax:

Other Firm ID 1:

Other Firm ID 2:

OK Cancel Help

Firm tab of System Settings

Other Tab of System Settings

Options > System Settings > Other Tab

The Other tab of System Settings holds general default information. For the firm's region, the administrator (Admin) can select the Currency, date, and measurement formats. For accounting, the Admin can enable G/L accounting, decide how the firm is going to track specific costs and revenues, and select default accounts for certain PCLaw tasks. There are other options pertaining to matters, vendors, and reports which can require certain tasks to be down or requirements to be met.

Other tab of System Settings

What You Should Know:

Use G/L Accounting

- Deselect to disable the G/L accounting option for the system.
- If disabled, PCLaw accounting functions are not available.
- When disabled, there is no need to close months or years, as financial statements are unable to be produced.
- Most firms that do not enable G/L Accounting, use a different software package for check writing, payment receipts, and general accounting functions.

Separate Hard and Soft Client Costs

- Select to separate hard and soft costs in the General Ledger only on the advice of the firm's accountant.
- Soft costs are expense recovery and billing adjustments.
- Hard costs are allocations from general checks or new payables.
- The implications of hard and soft costs are discussed in detail in the Virtual Training 6 - Accounting session.
- This option is not available for Accrual accounting.

Track Soft Costs in G/L

- Available for Cash accounting only.
- If deselected, soft costs are not posted to the G/L and all receipts for expense recovery transactions are posted to 5010 (or 5011 when hard and soft costs are split).
- Disable only on the advice of the firm's accountant.

Client Disbursement Clearing

- Hard costs clearing account allocated to matters.
- This is the account that PCLaw uses by default for general checks on the allocation to a matter.

Payroll Clearing

- This clearing account is for use for ADP Payroll only.

Track G/L Revenue

- Select *by Lawyer* to post revenue to the individual lawyer's fee account.
- Selecting *by Department* groups revenue items on financial statements under the income accounts that are associated with the department code. PCLaw creates income accounts automatically for department codes when this option is checked.
- Frequent switching between *by Lawyer* and *by Department* may affect the integrity of the general ledger.

Show Vendors in Paid To Pop Help

- Select to have vendors included in Pop Up Help when writing checks.
- This option is essential for firms requiring to submit 1099's.

No Accounting Entries On or Before

- The default date is usually the last day of the last month closed.
- Users may specify a date after that to restrict user entry into a period that is over, but not yet closed.

No Time/Fee Entries On or Before

- Select a date to restrict users from entering Time and/or Fee Entries prior to the specified date in the "No Time/Fee Entries on or Before" field.



Warning: Do not set the date back into a closed period to allow backdating entries. This may have an adverse affect on the relationship between a report balance and the associated G/L Account Balance.

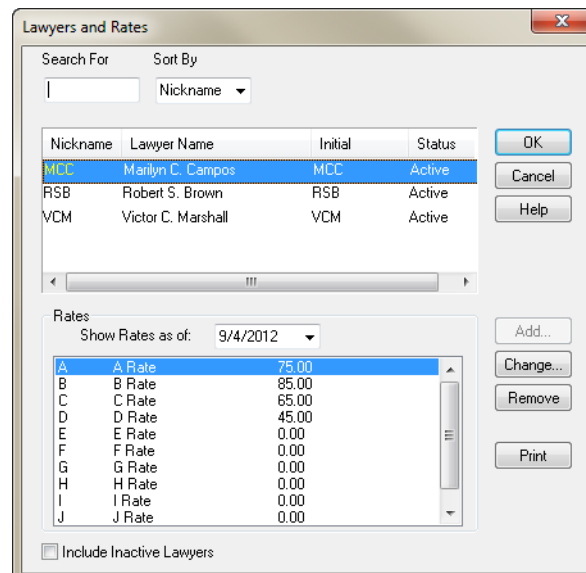
Lawyers and Rates

In PCLaw, tracked time for each timekeeper needs to be entered in the system. In addition to selecting a nickname (a short form for the person's name), initials (as the timekeeper will be delineated on the invoice) and the person's full name, assign default rates to each individual. Use Lawyers and Rates to maintain rates for the firm's individual timekeepers.

Lawyers and Rates Window

Options > Lists > Lawyers and Rates

The main Lawyers and Rates window lists the timekeepers in PCLaw and their corresponding rates. Use this window to further access windows and tabs that manages both timekeeper information and their assigned rates.



Lawyers and Rates window

What You Should Know:

Add

- New Timekeepers can only be added if there are available licenses.
- Click to add a new timekeeper including completing the General, Accounting, Special Fields, and Budget Figures tabs where applicable.

Remove

- Click to deactivate the highlighted lawyer.
- Lawyers can only be removed if they are no longer the assigned or responsible lawyer for any active matter.
- Deactivating a timekeeper who has left the firm creates space under the license for a new timekeeper. The firm's PCLaw software license determines the number of active timekeepers you can have at any one time.
- Deactivating a timekeeper is allowed if they are still designated as the Client Introducing Lawyer for a matter; however, once deactivated, a timekeeper can no longer be a Client Introducing Lawyer for a new matter.
- Deactivating a timekeeper who is the Working Lawyer on a matter is also allowed, even if the matter has unbilled time or fees on the Client Ledger, or if fees and disbursements owing to this lawyer are still outstanding. Inactive timekeepers still appear on reports but no new entries, other than write ups and write downs, can be made with these timekeepers.
- Deactivating timekeepers opens the Global Change Lawyers on Matters window, in order to reassign the roles for Matter Introducing, Client Introducing, Responsible, and Assigned formerly held by this lawyer.
- Resassign roles according to Client, Major Client, Type of Law, and Department on this window.

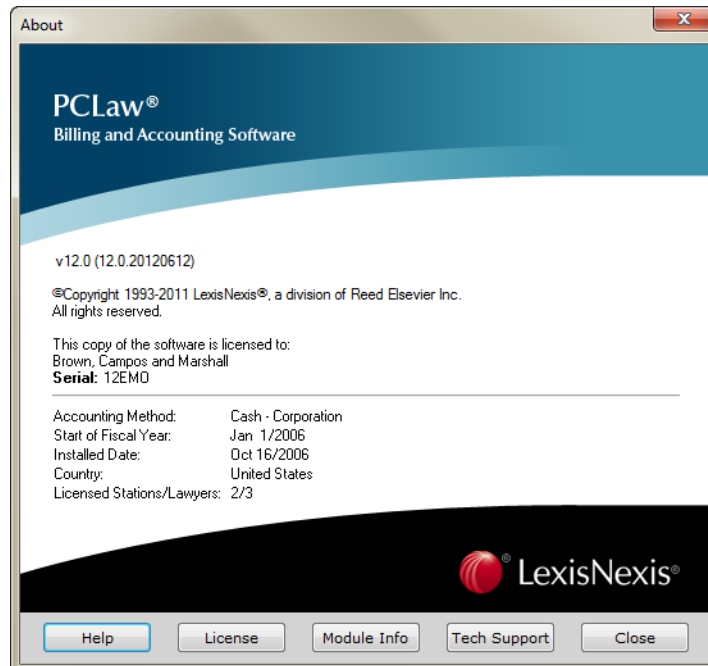
Global Change Lawyers on Matters window

Behind the Scenes

Each active lawyer created counts against the user license. All lawyers are listed on the Lawyers and Rates window, and the Licensed Lawyers value is displayed on the *Help > About PCLaw* window.



Tip: The Global Change Lawyers On Matters window is also available on the Tools pull-down menu.



About PCLaw window

PCLaw creates a record for each time keeper in the Lawyer Information data file. If a lawyer is deactivated, the record is not deleted from the Lawyer Information file, but is assigned an inactive status. The timekeeper continues to be available for reporting purposes.

Common Troubleshooting:

Toggling Lawyers

A firm may want to circumvent the licensing limitations by deactivating a lawyer with the aim of reactivating a timekeeper at a later date, while deactivating a different timekeeper.

This cannot work as once a lawyer is deactivated, it cannot be reactivated without the assistance of PCLaw Technical Support.

Added Timekeeper is not Saved

Adding a timekeeper in the Lawyers and Rates window does not create a record for that lawyer until OK is clicked in the main Lawyers and Rates window. If a user creates a timekeeper, and then cancels out of the main window, the new timekeeper is not available for selection, nor listed the next time the Lawyers and Rates window is opened.

General Tab of Lawyers and Rates

Options > Lists > Lawyers and Rates > General tab

Use the General tab to add basic information for the lawyer, including Calendar defaults, and for creating different rates and effective dates.

Change Lawyer Information MCC-Marilyn C. Campos

General Accounting Special Fields Budget Figures

Lawyer

Nickname Initials

Name

Category

Daily Goal Hours

Calendar

Use Calendar Event Color

Rates

Rate Changes Effective as of:

Rate	Rate Name	Amount
A	A Rate	75.00
B	B Rate	85.00
C	C Rate	65.00
D	D Rate	45.00
E	E Rate	0.00
F	F Rate	0.00
G	G Rate	0.00

* - Rate is newer than the change as of date.

Lawyers and Rates General tab

What You Should Know:

Nickname/Initials/Name

- The nickname is used for inputting data and producing reports.
- Initials are displayed on PCLaw bills, and are viewed by the client.
- The lawyer's name can be displayed on PCLaw bills and reports.

Category

- The lawyer category determines the order in which lawyers are listed on reports.

Calendar

- Check to allow the lawyer to create appointments and todo's on the Calendar.

Daily Goal

- Specify a number of hours each for each timekeeper.
- If the timekeeper is selected and the daily goal is not met, the day appears red on the Time tab of the Calendar.

Rates

There can be an unlimited number of rates for the firm. Users can create a Standard rate, a Discount rate, a Premium rate, a Legal Aid rate, and a Travel rate. Each timekeeper can have a different value for a specified type of rate.

A default rate is entered for a matter from the New Matter window when changing that matter. The rate can be adjusted on the Main tab of Matter Manager.

Rates are used in time entries, such as Time Sheet, Quick Charge, Quick Timer, and any PCLaw Timer. If a matter is an A rate matter, then the dollar value of the A rate is automatically entered for the specified timekeeper.

Timer	Date	Matter	Lwyr	Task	Hours	Rate	Amount
6/28/2011	6/28/2011	100	RSB	BW	2.00	2000.00	4000.00

Example of Rate on the Time Sheet

For example, a matter is charged the A rate. The A rate for Robert Brown is \$400 per hour. Time entries entered for Robert Brown automatically default to \$400 in the Rate column. Marilyn Campos has an A rate of \$385. Her time entries automatically default to \$385, even if they are entered on the same time sheet as Robert Brown.

Rates may be associated with a group of matters based on the Rate Table or customized at the matter level.

Lawyers and rate information is best demonstrated in a table format:

Lawyer	Category	A Rate	B Rate	C Rate	D Rate	E Rate
Robert S. Brown	Senior Partner	\$400.00	\$350.00	\$300.00	\$275.00	\$250.00
Marilyn C. Campos	Partner	\$385.00	\$330.00	\$280.00	\$275.00	\$250.00
Victor C. Campos	Partner	\$385.00	\$330.00	\$280.00	\$275.00	\$250.00

The Lawyer column lists the timekeeper, each with a unique nickname and initial. The timekeeper's position in the firm is demonstrated in the Category column.

The remaining columns display the rates for each rate code. If one lawyer has 12 different hourly rates, then all lawyers should have values filled in for the same rate categories, even if a timekeeper

only has fewer unique billing rates. The same value can be assigned for the multiple rates. This prevents a matter, assigned a rate H for example, from being billed at a rate of zero, or omitted from billing entirely, all because a lawyer only assigned values for rates A, B, C of his table, because he only has three separate billing rates.

The Rate columns represent the default rates assigned in the Matter Manager. If the rate is not assigned a value, then you must add the value for each time entry added to the Time Sheet.

Behind the Scenes:

Each Billing rate added to a lawyer creates a separate record in the Lawyers Rates data file. This file links the lawyer with the rate created in Rates Pop Up Help on the *Options > Lists* pull-down menu. Specific rate values are stored for the timekeeper in this file.

Accounting Tab of Lawyers and Rates

Options > Lists > Lawyers and Rates > Accounting tab

Each timekeeper has an individual fees account where auto allocated fees are posted upon receipt.

If a timekeeper is a partner and the firm is a partnership, LLP, LLC, etc, he/she may have Draw and Equity accounts assigned, as well as Income Allocation percentages.

The screenshot shows a window titled "Change Lawyer Information LAW-Lori Angela Wheeler". It has four tabs: "General", "Accounting", "Special Fields", and "Budget Figures". The "Accounting" tab is selected. The "General Ledger (G/L) Information" section contains the following fields:

- Fees Account: 4000.LAW
- Use Draw And Equity Accounts
- Draw Account: 3501.LAW
- Equity Account: 3000.LAW
- Retained Earnings Account: 3500.LAW
- Income Allocation Percent: 0.00

At the bottom, there is a "Department" dropdown menu set to "Firm". On the right side of the dialog, there are buttons for "OK", "Cancel", and "Help".

Lawyers and Rates Accounting tab

What You Should Know:**Fees Account**

- PCLaw creates a default fees account when a lawyer is added.
- Accept or change the account to match your G/L account numbering.

Use Draw and Equity Accounts

- Check this box if the timekeeper is also a partner.
- Lawyer Draw and Equity accounts are not available if the firm is a corporation.

Draw Account/Equity Account/Retained Earnings Account

- PCLaw creates default accounts when a lawyer is added.
- Accept or change the account to match the firm's G/L account numbering system.

Income Allocation Percent

- Type a percentage to have PCLaw automatically allocate that portion of the firms' income/loss to the lawyers' equity accounts.

Department

- Departments can be used for the income statement or when reporting revenue, for example when Track G/L Revenue By Department is selected on the Other tab of System Settings.

Behind the Scenes:

PCLaw automatically creates a new fee account, Fees-Lawyer Name (4000.ABC) on the General Ledger and Balance Sheet whenever a timekeeper is added. ABC represents the lawyers initials as selected on the General tab. The account is created when OK is clicked on the main Lawyers and Rates window.

For partnerships, if Use Draw and Equity Accounts is checked, then additional accounts are created in the same manner as the fees account. Equity-Lawyer Name (3000.ABC) is an Equity account whereas Retained Earnings-Lawyer Name (3500.ABC) and Drawings-Lawyer Name (3501) are Retained accounts.

These accounts are considered Reserved Accounts, that is, PCLaw reserves the account for a specific use. These accounts, however, are not control accounts, as they are not assigned to a specific journal in PCLaw.

A separate record is created in the G/L Account Information data file for each new account. These records include the lawyer's ID.

Special Fields Tab of Lawyers and Rates

Options > Lists > Lawyers and Rates > Special Fields

This tab is used primarily for electronic billing purposes, to provide generic firm and timekeeper information for the electronic billing process. Electronic billing tabs storing detailed data, including the required electronic billing template, are in Matter Manager.

If a firm performs electronic billing, the client who requests this format provides instructions as to what is required. Electronic Billing is primarily required by insurance companies.

Budget Figures Tab of Lawyers and Rates

Options > Lists > Lawyers and Rates > Budget Figures

Create a budget for the selected lawyer by completing the hour and time values for each required month.

Budget Period	Hours	Value
Mar 2012	0:00	0.00
Apr 2012	0:00	0.00
May 2012	0:00	0.00
Jun 2012	0:00	0.00
Jul 2012	0:00	0.00
Aug 2012	0:00	0.00
Sep 2012	0:00	0.00
Oct 2012	0:00	0.00
Nov 2012	0:00	0.00
Dec 2012	0:00	0.00
Jan 2013	0:00	0.00

Lawyers and Rates Budget Figures tab

Rate Categories

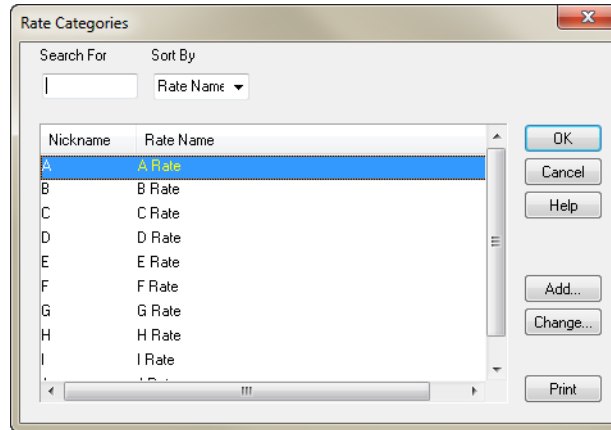
Options > Lists > Rate Categories

As well as from within Lawyers and Rates, Rate categories may be maintained through any pop up help window of the same name, or accessed on the *Options > Lists* pull-down menu.

Rates are listed by Nickname or by Rate Name.

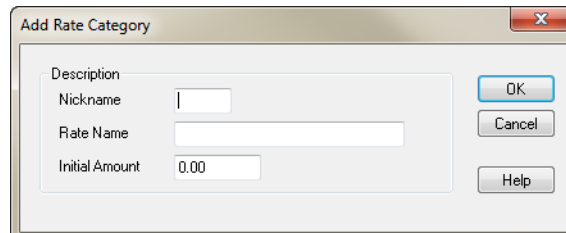


Tip: You can also budget for all lawyers by month using the Lawyer Budgeting feature on the Tools pull-down menu.



Rate Categories window

Use the Add Rate Category and Change Rate Category windows to create or modify rates, respectively.



Add Rate Category window

Security

Use Security Settings to control users' access to critical functions and reports in PCLaw. When users log in, PCLaw records the User ID on reports to track who makes each entry.

Security Overview

PCLaw Security is based on users and groups. Groups are defined to have access to specific PCLaw features. Users are created, assigned a unique password, and made a member of one or more groups. Once a member is assigned to a group, the user has the same rights of the group.

Additionally, the advanced settings may restrict or give access to matters, bank accounts, timekeepers, and other items in PCLaw on an individual user basis. For example, a user may have access to view the Trust Bank Journal, but may be restricted to viewing only the mixed trust account, and not a private trust fund account.

Security is mandatory for a new PCLaw sets of books and cannot be disabled. Firms updating from PCLaw 6 and lower, where security is disabled, have the option grandfathered into PCLaw 12.

In the PCLaw Setup Wizard you are prompted to enter a password for Admin. This is a mandatory field and must be completed. After PCLaw is installed, Security can be accessed from the *Options > Administrator* pull-down menu.

The Admin User

PCLaw automatically creates the first user in security, called Admin. This user cannot be deleted from the Users box. The Admin user is assigned as a member of the Admin group and cannot be removed from that group, nor can the Admin group be removed. Only the Admin user can access advanced Security Settings in PCLaw.

The Admin group receives all rights in PCLaw by default and cannot have any of these rights restricted. Other users can be assigned to the Admin group and receive all the rights to the group. The assignment of these users is not permanent, as they can be removed from the group at any time.

The Admin has the rights to create new groups, assign access to PCLaw features, create new users, and assign rights to those users. When PCLaw is locked, the Admin is able to override the lockout and open PCLaw.

Groups Tab of Security Setup

Options > Administrator > Security > Groups Tab

All new users in PCLaw must immediately be assigned to a group. Therefore, you must create groups before adding users. A group can have any number of users. It may be limited to a few PCLaw features, or have rights to all PCLaw features.

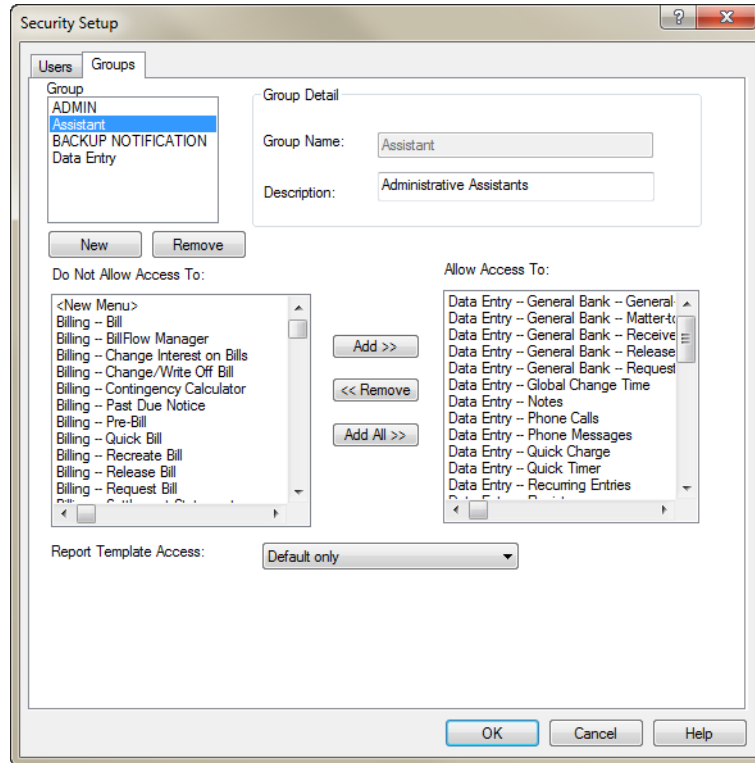
Use the Groups tab to administer groups to grant or restrict access to features in PCLaw. Create groups with access to specific features or groups of features.

Each user may belong to more than one group. Changes to groups will not be viewed by the users until they log out and re-enter PCLaw. The Admin group level may not be removed.

Notes



Warning: Only the PCLaw and Network administrators should have access to the Admin password. Limit the use of Admin login as much as possible by assigning users their own unique identity.



Security Setup - Groups tab

What You Should Know:

New

- PCLaw displays the Group Detail window where a Group Name and Description can be added.

Remove

- A group cannot be removed if there are users still assigned to that group.

Add All>>>

- When giving a group access to only a few features, it is more efficient to add the features one at a time.
- To give a group access to a majority of features, add all the features and then remove those whose access is to be restricted.

Report Template Access

- Select from the drop down menu whether the group has rights to use only, change but not save, or change and save different report templates.

User Tab of Security Setup

Options > Administrator > Security > Users Tab

From the User tab, administrators can create new users and remove users, control membership of users to groups, administer passwords, and access the advanced tabs for each user. If Advanced Security Preferences are enabled, then an Account Access section is also available. Advanced Security Preferences is discussed with PCLaw Mobility.

Security Setup - Users tab

What You Should Know:

User

- Many PCLaw reports allow you to see the user that has posted each transaction.
- To utilize this feature select the Show User Name option when producing the report.

Add>>

- A user must be assigned to a minimum of one group immediately after creation.
- Users can be assigned to multiple groups.



Note: There should be a user setup for each staff member.



Note: Users can have memberships in multiple groups.

Show User Rights

- Click to view the features in which a user has rights using the PCLaw Menu Maintenance window.
- Select each pull-down menu to see the menu options available to the user.

Advanced

- Click to set *Advanced* options for a user.
- Advanced security options allow users to be assigned individual rights to view or to change Calendar events, matter, time, or bank account information, or limit access to Matter Manager.

Report

- Click to produce a User Security Listing.
- Producing the User Security Listing automatically saves the changes for the current security session and closes the Security Setup window.

OK

- Users are now able to log into PCLaw under their own user name and password.
- They will only see the menu items that they have been granted access.
- Restricted features do not appear on the pull-down menus or in Quick Step.
- Users with limited rights in PCLaw should not be given access to Security.

Clients

A client in PCLaw is the customer who employs the law firm. A matter in PCLaw is the working file or case for the client. A client can have multiple matters. All matters in PCLaw must be associated with a client. This chapter focuses on the PCLaw modules that perform on the client level.

Creating New Clients

File > Client > New Clients

New clients can be created without creating associated matters. Generally, firms may create clients autonomous of matters to enable the major client option. A major client in PCLaw is used to group separate but associated clients.

For example: A firm works on behalf of a bank. In PCLaw, the bank entity itself is the major client, while each branch comprises of associated clients. The firm then uses New Client to create the major client, and subsequently create the branches as associated clients when matters are created for a respective branch.

Reports and payments can be made on behalf of a major client and may include any of the associated clients. The New Client window contains the same client information fields found in the New Matter window.

New Client window

What You Should Know:

Client

- PCLaw does not assign a value to this box, even if Automatic Matter Numbering is enabled.

Is a Major Client

- Major Client designation allows associated clients to be assigned.
- An example of major and associated clients is a retail chain of stores. The head office is the major client, and each location or franchise is an associated client.
- Matters can be assigned to both major and associated clients.

Associate to This Major Client

- Enter a client number to associate this client to a major client.
- A client cannot be both an associate client and a major client.

Client Intro Lawyer:

- Select a lawyer to designate a client introducing lawyer for this client.
- This lawyer stays with the client.
- The client introducing lawyer is defined as the lawyer who brings a client to the firm.
- Although a client/matter can be created without a Client Introducing Lawyer, it is important for reporting purposes that each client/matter has a Client Introducing Lawyer.



Note: If the client has both a person and a corporation name, both names are included in the Conflict Search.

Alias

- Alias is a PCLaw 12 text field that can be used for alternate names or to differentiate clients from each other.
- Alias is included as part of the Client Display Name for Matter Pop Up Help.
- It is not available as a filter or displayed as content on any PCLaw report.
- A Client Alias token can be added to billing templates, however it is not found on templates by default.

Categories

- Categories is a PCLaw 12 Pop Up Help list.
- Select a category from the drop-down list to classify the client.
- Items on the Categories list can be added or modified on the Options > Lists > Category Codes menu.
- A new template has been added to the List of Clients, which displays the assigned categories along with other client details.

Display As

- If both a person and firm name is provided, select which name is to be prominent.

Adding a Second Client Name

A second person can now be added as a client, but saved as a separate entity. This new option is available from Client Manager, Contact Manager, and Matter Manager, and in the accompanying New or Add windows for Clients, Contacts, and Matters.

The fields for the second client name are hidden when blank. On the data entry window for Client, Contact, or Matter, clicking the Add Name button expands the area to display the additional fields.

Additional Name area

What You Should Know:

If two names are stored as the client, the client address fields are linked to the first client name, and are retained if the second client is removed. An address for the second name can only be added as a contact address.

The second client can be assigned a unique Alias and Category. The Type of Client can be either a person or a firm, and is not dependent on the first client's type.

Adding a second name creates an abstract client, in that the client is a combination of the two names entered. Use the **Display Client Name As** field to assign a dedicated name to the abstract client. The abstract client is displayed on reports and Pop Up Help. Removing the second client name returns the client to the first client name entered.

Behind the Scenes:

A contact can only be the primary client once. A contact that is a primary client can be a secondary client for another primary client. A contact can be the secondary client multiple times, without limit.

This limitation exists because when a person or company is added as a primary client, two records are created in PCLaw, one as a client and one as a contact. When a person or company is added as a secondary client, only one contact record is created in PCLaw. A client record is not created.

This allows the firm to remove the secondary client, without affecting the integrity of the client record.

The address and contact information for the client is part of the client record, and is attached to the primary client. The Second Billing Address information is also part of the client record, and attached to the primary client record.

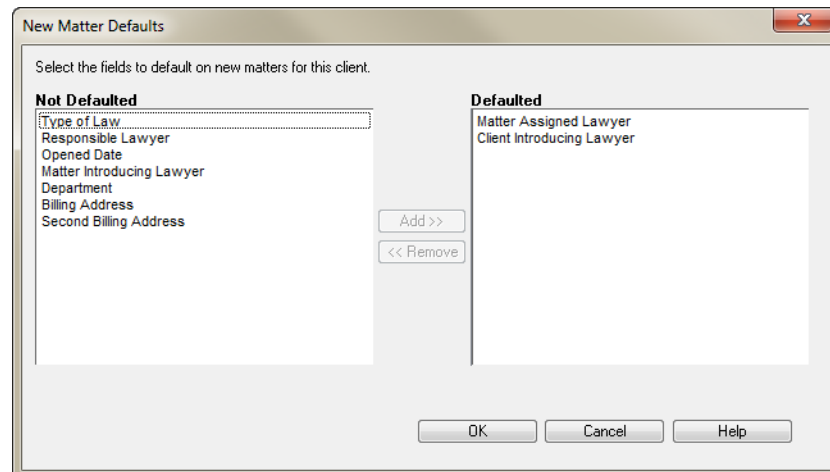
Common Troubleshooting:

Using an existing contact for the secondary matter

PCLaw will automatically match up secondary clients with existing contacts, but only if the secondary client name is entered exactly as the contact is saved in PCLaw.

New Matter Defaults

This feature sets default values for new matters created for this client. Automatically Default Client must be checked on the New Matter Settings window on the Matters tab of System Settings for fields to be listed in this window.



New Matter Defaults window

Client Manager

File > Client Manager

After a client is created, client information can be viewed or changed through Client Manager. The toolbar allows for quick movement between clients, the ability to add new clients, and to produce PCLaw reports. Separate tabs in Client Manager displays information for clients, matters associated with the client, and custom tabs.

Selecting a Client

When opening Client Manager for the first time, the user must select a matter. Thereafter, the last client viewed is remembered automatically.

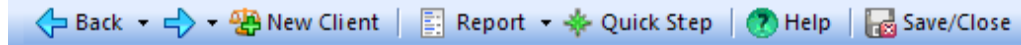
Client Law, Peter

Client Information bar in Client Manager

To change the client to work with, type the client nickname in the Client box, or double-click to select from *Pop Up Help > Clients*.

Toolbar

The tool bar allows for easy movement between clients and for accessing other PCLaw features. Client Manager creates a short list of clients as they are viewed during the Client Manager session.



Toolbar in Client Manager

Main Tab of Client Manager

The Main tab contains the basic information for the client, including name, address, phone numbers, lawyer, and major client status. This tab is available to users with assigned rights to Client Manager.

Client Manager - 101 - Chaucer, Samantha

Client Chaucer, Samantha

Main Matters Add Tabs...

Is a Major Client

Associate with a Major Client

Client Intro Lawyer

Title Middle Last

Alias Category

Firm Name Type Of Client

Address

Street

City

State Zip

Country

Attention

Phone & E-mail

Business Cell

Home

Bus. Fax

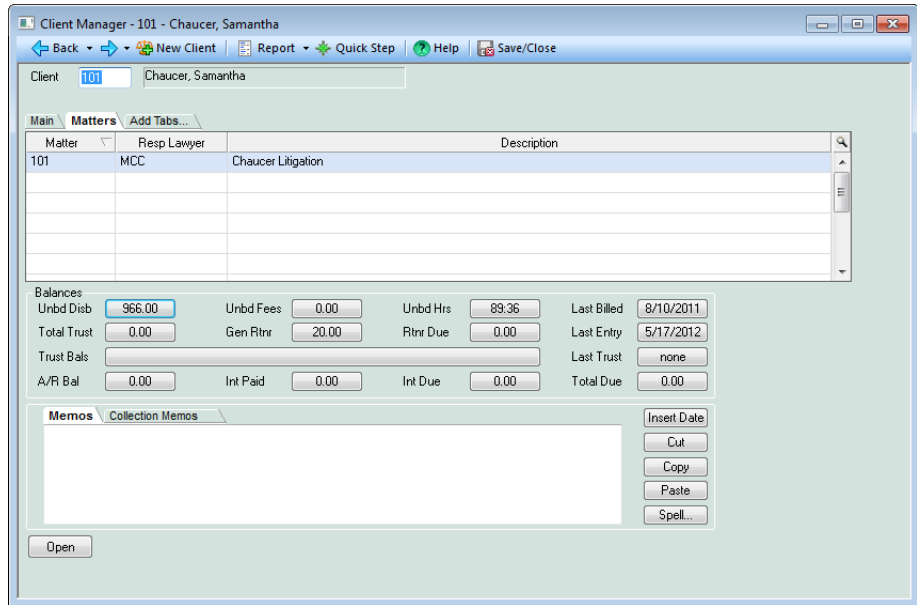
E-mail 1

E-mail 2

Main tab of Client Manager

Matters Tab of Client Manager

The Matters tab operates as an interactive client summary for all matters assigned to the client.



Matters tab of Client Manager

Balances

Client summary information appears in the Balances area. If (*All Matters*) is selected, the overall balance appears for all matters assigned to the client. If an individual matter is highlighted, matter summary information appears for that matter.

Each balance is displayed on a button. Click that button to view detailed transactions that comprise the balance, filtered for that matter only. The buttons are not interactive for client balances.

Summary	Opens to....	Filter Restrictions/Notes
Unbd Disb	Register > Ledger tab	Disbs & Unbilled
Unbd Fees	Register > Time tab	Unbilled & Both
Unbd Hrs	Register > Time tab	Unbilled & Both
Total Trust	Register > Ledger tab	Trust & Billed + Unbilled
Gen Rtnr	Register > Ledger tab	Receipts & Billed + Unbilled
Rtnr Due	Register > Ledger tab	Receipts & Billed + Unbilled
Trust Bals	Register > Ledger tab	Trust & Billed + Unbilled
A/R Bal	Register > Invoice tab	Refer to matter summary
Int Paid	Receivables by Client	For matter
Int Due	Receivables by Client	For matter
Last Billed	Register > Invoice tab	Not filtered
Last Entry	Register > Ledger tab	Not filtered

Summary	Opens to....	Filter Restrictions/Notes
Last Trust	Register > Ledger tab	Trust
Total Due	Register > Ledger tab	Not filtered

To access the Matters tab, the user must be assigned rights to Client Manager. To drill-down on respective matter totals, the user must be assigned rights to the Register and the reports described above.

Memos/Collection Memos

The bottom portion of the Summary tab contains areas for storing memos for the matter command buttons for editing text.

Memos appear on the Matter Manager > Summary tab and the List of Clients report.

Collections Memos tab appears on the Matter Manager > Summary tab, List of Clients and the Receivables by Client reports.

Conflict and Global Searching

PCLaw provides standard name searching with Conflict Check, and a customizable search tool, Global Search. Both tools are able to scan the database for particular words, names, or phrases.

Conflict Search

File > Client > Conflict Search

Use the Conflict Search to determine if new clients will cause a conflict with existing files. Most bar associations and law societies require conflict checks for lawyers and their firms. It is a violation of several rules regulating the bar to represent someone, directly or indirectly, with a conflict of interest with an existing firm client.

In PCLaw, Conflict Search checks all clients, matters, contacts, and/or vendors to determine if there are any previous contacts with a potential client or matter that could lead to a conflict of interest. Names are checked with possible occurrences in calendar events, phone calls, notes, all data entry and billing, and documents added to Document Manager. Conflict searches can be set to run automatically when creating a client or matter on the Matter tab of System Settings.

When saving a new client or matter, PCLaw searches the name fields and reports any conflicts. Further, conflict searches may be performed manually when creating a new client or matter. On the New Client or New Matter window, click the Conflict button after

entering the client or matter information to open the Conflict Search window.

File Conflict List

What You Should Know:

Name Matching Rule

- Define what is searched by selecting the parameter in the drop-down menu.
- Choose from Name Contains, Name Starts With, Exact Match, or Full Phrase.

Show Full Re Line/Memo

- Display the complete Re or Description line and Memos on the File Conflict List for all matches.

Name

- Type the first and last or firm name of the person to be checked in the Look For area.
- When the Conflict button is clicked in New Matter or New Client, the last name of the new matter or client is filled in automatically into the first Name box.

Global Search

Use Global Search to find words or data that may have inadvertently been entered incorrectly, associated incorrectly, or where you simply cannot recall a name, but can remember a note, time entry, payment comment that was entered, etc.



Note: You can conduct a conflict search for up to 12 names at one time.

Check one or more of the following in the Search area:

File Global Search List

What You Should Know:

Matters (Active and Archived)

- Search saved information for all active matters, inactive matters, and archived matters.
- Matters that are purged are not searched as the information is not retained by PCLaw.

Clients/Contacts/Vendors

- Search saved information for all persons.
- Clients and vendors in PCLaw can be merged as a subset of clients.

Time Dockets

- Search saved information for all time and fee entries.
- This includes time entries posted to PCLaw from third party applications using PCLaw Timers.

Billing/Disbursements/General Bank/Trust Bank/Payables

- Search saved information for other data entry.

Documents

- Search all documents added to PCLaw through Document Manager.

Show Associated Matters for Contacts

- If a discovered conflict is a contact, check this option to display any matters associated with that contact.

Show Associated Matters for Clients

- If a discovered conflict is a client, check this option to display any matters assigned to that client.

Client Reporting**Client and Matter Change Log**

The Client and Matter Change Log provides a record of changes made to matter information, such as name, address, description, and the status of the matter. The report may be produced by matter, client or date range. Use this report periodically to monitor adjustments to matter information.

Productivity by Client

This report ranks clients by criteria selected when creating the report. Run the report to show client with the most unbilled, billed and paid fees, unbilled and billed disbursements, or total A/R, trust, and payment received.

Matter Settings

Prior to adding matters to your database, PCLaw can be configured to aid in the creation of the matters. Defaults can be created for the firm to ensure both the correctness of information added to PCLaw, as well as to decrease the volume of data that need to be entered.

Included in this section is the Matter and Tax tabs of System Settings, and other tools from the *Options > Lists* pull-down menu. In PCLaw Advanced Security, we will look at the Matters and Permissions tabs. We have already examined maintaining lawyers and billing rates from the *Options > Lists* pull-menu. We are now going into further detail about Departments, Referral Sources, and Types of Law.

Matter Tab of System Settings

Options > System Settings > Matter Tab

The Matter tab of System Settings determines the configurations for new matters created in PCLaw. Options affect only matters created after the option is selected and saved. To change information on previously existing matters, use Global Change Matters.

The screenshot shows the 'System Settings' dialog box with the 'Matter' tab selected. The dialog has a title bar with a question mark and a close button. Below the title bar are several tabs: 'Past Due/Interest', 'Memorized Transactions', 'Check Pattern', 'Front Office', 'Research', 'Firm', 'Other', 'Data Entry', 'Banking', 'Tax', 'Matter', and 'Billing'. The 'Matter' tab is active. The dialog is divided into several sections: 'Address' with fields for City, State (IL), and Country (USA); 'Default' with dropdowns for Task Code, Rate (0.00), and Department; 'Sort Options' with radio buttons for 'By Client as Entered' (selected), 'By Client and Matter', and 'By Client and Description'; 'Automatic Matter Numbering' with radio buttons for 'Disable', 'By Firm' (selected), and 'By Client'; 'Charge Hold' with checkboxes for 'Credit Hold' and 'Trust Receipt Hold' (with a '7' in a box next to it); and 'Files Can Be Destroyed After' with a '0' in a box and 'Years' label, and checkboxes for 'Run Conflict Search on New Matter/Client' and 'Log Matter Changes' (checked). At the bottom, there is a 'New Matter Settings...' button and 'OK', 'Cancel', and 'Help' buttons.

Matter Tab of System Settings

Address

- Specify the most common city, province/state, and country for new matters.

Task Code

- Enter the default task code to assign to new matters.

Rate

- Enter the default rate category code, such as A, B, or C, to assign to new matters.

Department

- Select the default department to assign to new matters.

Sort Options

- Select between *By Client as Entered*, *By Client and Matter*, and *By Client and Description*.
- Sort determines the default order of matters for clients in client-based reports such as Client Summary, List of Clients, and Pop Up Help.

Automatic Matter Numbering

- Users may override any matter number, as long as that number does not previously exist.
- *Disable* - Manually assign matter numbers when creating new matters.
- *By Client* - The matter number is derived from the client number automatically – client 150 defaults to 150-001 – the first matter for client 150. For the next matter for that client, the matter defaults to 150-002.
- *By Firm* - The system increments the matter numbers, i.e. 100, 101, 102, 103.

Charge Hold

- *Credit Hold* - De-select to default new matters not be on Credit Hold when a file is created.
- *Trust Receipt Hold* - De-select to default new matters not be on Trust Receipt Hold when a file is created.
- *Days to Hold Receipt* - Specify the default number of days to hold receipt.

Files Can Be Destroyed After x Years

- Specify the number of years a file must be legally kept for before it can be destroyed.
- When Archiving a Matter the Destroy Date automatically advances to the number of years specified in System Settings.
- When running the report for closed matters, this date can be utilized to display all matters to be destroyed as of a specific date.

Run Conflict Search on New Matter/Client

- Forces PCLaw to conflict check the new name entered into new matters or new clients.

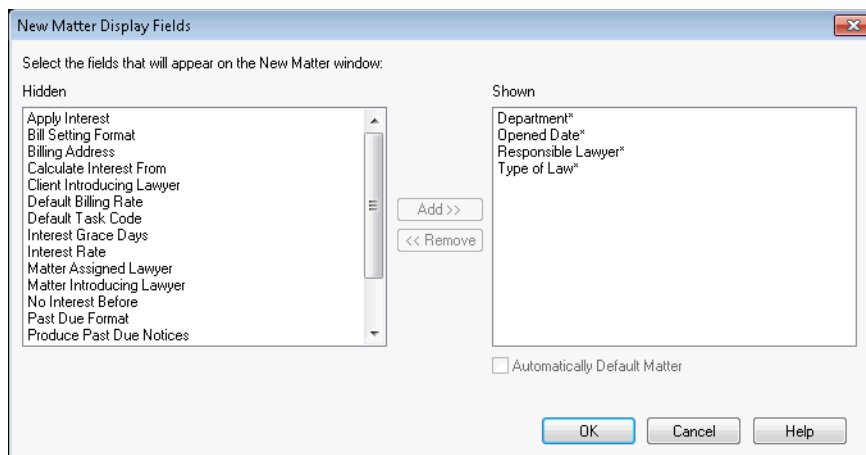
Log Matter Changes

- Select to record changes to a matter on the Matter Change report.

New Matter Settings

Select additional fields to appear or not appear on the New Matter window. Fields that are marked with an asterisk are mandatory for input when creating new matters, and are always displayed.

The benefit of this feature is for users who are restricted from changing data in Matter Manager, but certain data must be entered upon initial entry to start a new matter.



New Matter Display Fields

Hidden

- Lists possible fields that could appear on the New Matter window, but currently do not.
- Highlight a field to add it to the New Matter window, then click the *Add >>* button.

Shown

- Lists all fields that currently appear on the New Matter window.
- Highlight a field to remove it from the New Matter window, then click the *Remove <<* button.

Automatically Default Matter

- Check this box to force a default initial value on the field that is highlighted in the Shown box.
- Values are added on the client level, either in Client Manager or the New Matter window, which is then applied to any new matters for that client. Click the New Matter Defaults window in either of these locations.
- Refer to “New Matter Defaults” on page 48 for more information.



Note: Generally all columns on the right such as Include Fee Entries, should be selected by default and deselected during Billing, as needed.

Tax Tab of System Settings

Options > System Settings > Tax Tab

For firms collecting sales or a value added tax, use the Tax tab of System Settings to set the tax rates, and the applicable dates for when they apply.

Additional fields have been added for PCLaw version 10 SP 4 to enable historic rates for value added tax to be applied. These rates would be active for charges occurring prior to a set date.

The screenshot shows the 'System Settings' dialog box with the 'Tax' tab selected. The 'Sales Tax' section includes checkboxes for 'Charge sales tax on fees at a rate of: 0 %', 'Charge sales tax on disbursements at a rate of: 0 %', and 'Post input tax credit to G/L'. It also has date pickers for 'Charge fees entered before: 1/1/1982' and 'Exempt from charges before: 1/1/1982'. The 'Goods and Services Tax (GST) / Harmonized Sales Tax (HST)' section includes a 'Charge GST' checkbox, 'Sales tax charged after GST' checkbox, and various rate pickers (Sales tax rate: 0 %, Rate on fees: 10 %, Rate on disbursements: 10 %). It also has a 'Charge items before' date picker set to 1/1/1982. At the bottom, there are checkboxes for 'Matters taxable by default' and 'Show Tax category on Time and Fee screens'. The dialog has 'OK', 'Cancel', and 'Help' buttons.

Tax Tab of System Settings

Sales Tax

- Select to charge a sales tax as applicable.
- Select Post to G/L, if you take a Tax Credit for sales tax paid out.

Goods and Services Tax (GST)/Harmonized Sales Tax (HST)

- Select to charge a value added tax, as applicable.

Matters Taxable By Default

- Check to enable applicable tax on all new matters created from this point forward.

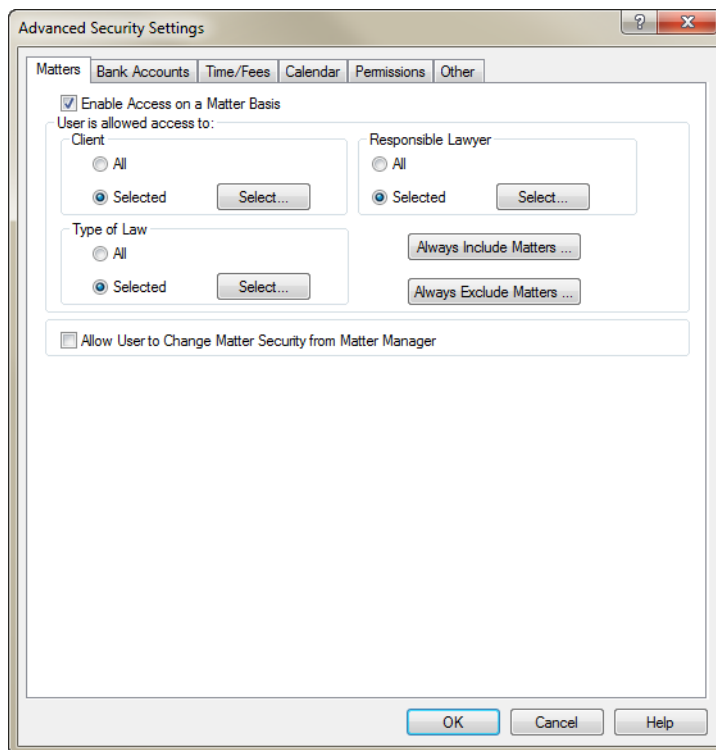
Show Tax Category on Time and Fee Screens

- Select to allow the tax category to be overridden on time and fee entries.

Matters Tab of Advanced Security

Options > Administrator > Security > Advanced > Matters Tab

Matters may be restricted on an individual matter basis for each user. Depending on which entries are marked, each user will have access to entries for selected clients, types of law, and responsible lawyer.



Matters Tab of Advanced Security Settings

Client

- Selections enable access to all clients or to the selected clients.

Responsible Lawyer

- Selections enable access to all responsible lawyers or to the selected responsible lawyers.

Type of Law

- Selections enable access to all types of law or to the selected types of law.

Always Include Matters

- Select to always include matters in Matter Pop-Up Help.

Always Exclude Matters

- Select to always exclude matters in Matter Pop-Up Help.



Note: Prior to PCLaw 12, the Permissions tab was labeled as the Matter Manager tab, and its rights only applied to Matter Manager

Allow User to Change Matter Security from Matter Manager

- Selection enables the staff to specify which users have access to the matter from Matter Manager.
- If the staff member is allowed to change matter security, then the user can do this in a Matter Manager window.
- On the *Matter Manager > Settings tab*, access Security to change other users' security for this matter.
- User Names with access to the matter are selected. Select/deselect users, as applicable, to allow access or restrict access to each user, respectively.

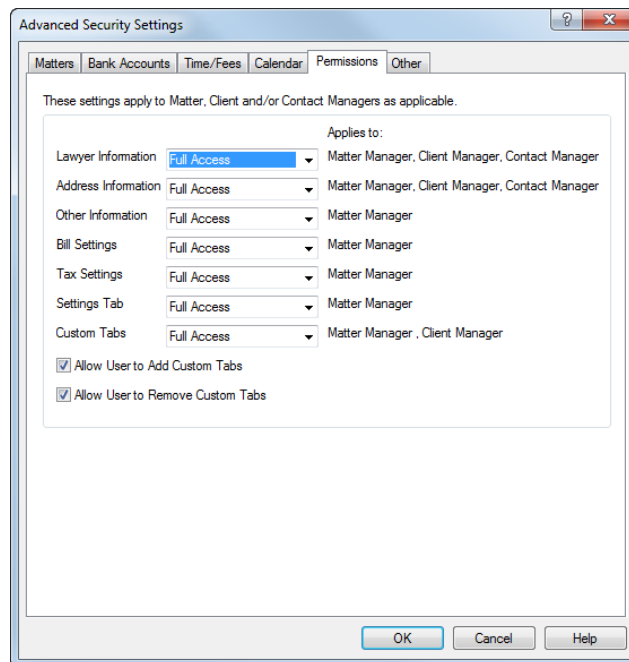
Permissions Tab of Advanced Security

Options > Administrator > Security > Advanced > Permissions

Areas that may be restricted in Matter Manager are as follows:

- Lawyer information
- Address information
- Other information
- Bill settings
- Tax settings
- Custom tabs.

These restrictions are controlled by the selection on the Permissions tab of Advanced Security. By default, each user has full access to Matter Manager unless restrictions are chosen. Additional settings apply to Client Manager and Contact Manager



Advanced Security Settings - Permissions tab

Full Access

- Allows user to view and change the field.

View Only

- Allows user to view the field, but not change it.

Hidden

- Does not allow the user to view or change the field.

Allow User to Add Custom Tabs

- Check if the user is allowed to add custom tabs to the matter.

Allow User to Remove Custom Tabs

- Check if the user is allowed to Remove custom tabs from the matter.

Categories

Options > Lists > Category Codes

Categories can be accessed from the Client Manager, Contact Manager, and Matter Manager, and from the accompanying New or Add windows for Clients, Contacts, and Matters. Categories, once assigned, can be standardized in a list format and referenced through Pop Up Help.

The screenshot shows the 'Client Manager' window for client 'Able, Barry B.'. The form includes fields for Title, Alias, Firm Name, Address, and Phone & E-mail. The 'Category' dropdown menu is highlighted with a red circle, and the current selection is 'Last Able'.

Main tab of Matter Manager

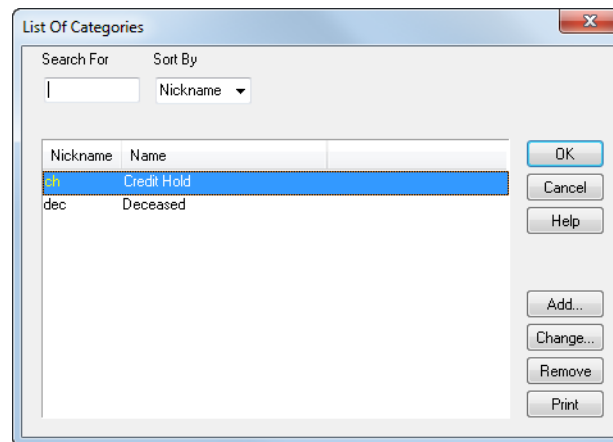
What You Should Know:

Select a category from the drop-down list to classify the client. Items on the Categories list can be added or modified on the Options > Lists > Category Codes menu.

A new template has been added to the List of Clients, which displays the assigned categories along with other client details.

Categories

Use Category codes as an additional classification for a client. Categories are found on the Primary Address tab of Matter Manager, the Main tab of Client Manager, as well as on the New Client and New Matters window.

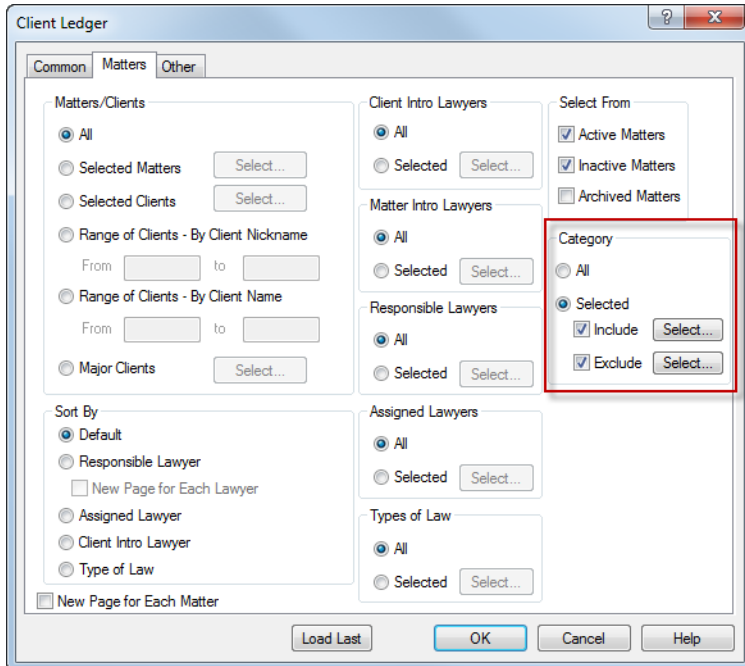


List of Categories window

A Category code consists of a nickname and a name. The list is sortable by either criteria.

Selecting Categories

Many of the matter based reports now have a Category option on their respective Matter tabs. This option allows the selection to include or exclude specific categories. The exclude option is vital to ensure certain categories are not part of an action. For instance, a firm can create a category of Deceased to exclude these clients from holiday card mailings.

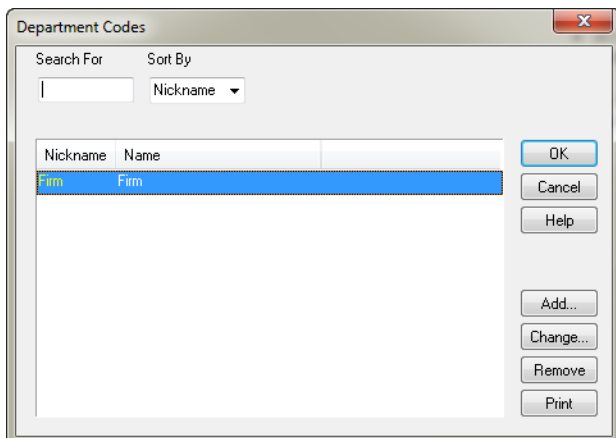


Matters tab of Client Ledger

Department Codes

Options > Lists > Department Codes

Department codes are used to categorize General Ledger accounts. Once categorized, Income Statements and Balance Sheets may be run for a specific department, or a consolidated Income Statement or Balance Sheet can be created. Firm is the default department category, and the only category created by PCLaw.



Department Codes window

Add

- Click to create new departments using the Add Department Code window.
- Nicknames may be up to eight characters in length.
- A general ledger account may be assigned to new or existing departments, if *Track G/L Revenue by Department* is enabled on the Other tab of System Settings.

Change

- Click to modify the highlighted department using the Change Department Code window.

Remove

- Click to delete the highlighted department.

Print

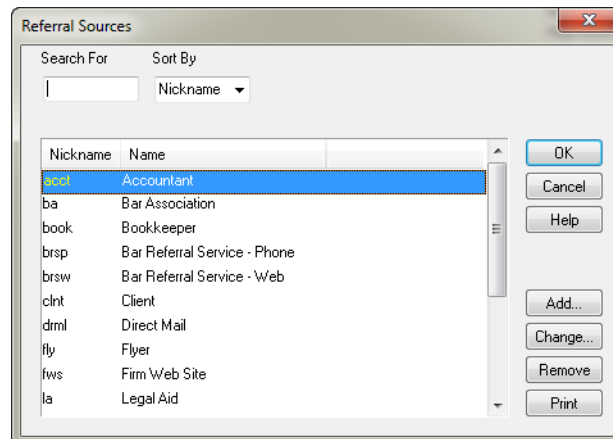
- Click to print a Department Codes report.

Referral Sources

Options > Lists > Referral Sources

Referral sources in PCLaw are used as a marketing tool to track the method in which matters come to your firm. They consist of a nickname and an extended name. For example, the referral source “ye” might represent the yellow pages.

Referral Sources may be added to a new matter through New Matter or/and subsequently added/changed within Matter Manager. The List of Clients can be run by referral type.



Referral Sources window

Add

- Create a new source using the Add Referral Sources window.

Change

- Click to modify the highlighted source using the Change Referral Sources window.

Remove

- Click to delete the highlighted source.

Print

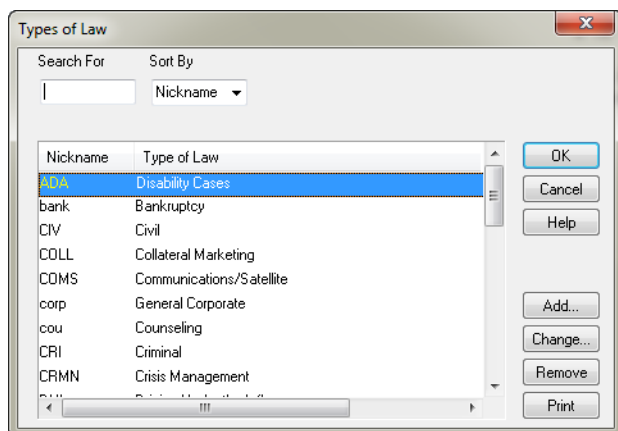
- Click to print a Referral Sources report.

Types of Law

Options > Lists > Task Codes

Each matter is assigned a type of law to ensure PCLaw can track productivity or display a list of matters by these categories. A type of law may be added when creating a new matter through the New Matter window, and subsequently adjusted in Matter Manager.

A type of law consists of Nickname and Description fields. A Matter Bill Setting profile may also be assigned to a type of law.



Pop Up Help - Types of Law window

Add

- Click to enter new law types using the Add Type of Law window.
- A type of law nickname may be up to four characters in length.
- Select the profile to assign a Matter Bill Setting to the code.

Change

- Click to modify the highlighted type of law using the Change Type of Law window.

Remove

- Click to delete the highlighted type of law.

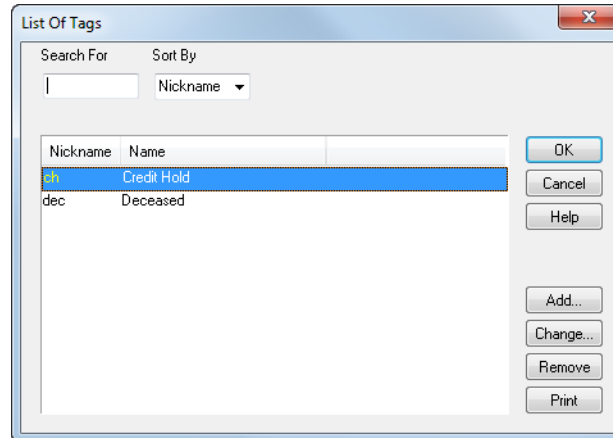
Print

- Click to print a Preset Types of Law Listing.

Tags

Options > Lists > Tag Codes

Tag codes are a feature new to PCLaw version 12. Use Tag codes as an additional classification for a client. Tags are found on the Primary Address tab of Matter Manager, the Main tab of Client Manager, as well as on the New Client and New Matters window.



List of Tags window

A tag code consists of a nickname and a name. The list is sortable by either criteria.

Matters

In PCLaw, the parties for whom the firm is working are called clients, the cases or files worked on for these clients are called matters. Matters are used to coordinate client related activities such as fees, expenses, payments, appointments, and phone calls, and to organize matter related documents, e-mail, and research. Data entry, billing, payments, and reports are all matter driven.

Prior to adding time or expense entries, or creating billing matters must be added to PCLaw. Over the life of the matter, the matter nickname may be adjusted or the matter may be assigned to a new client. Matter information may be changed or summarized through specific features and PCLaw modules. Reports and labels may be printed for the matter. This chapter focuses on PCLaw modules that are used on the matter level.

Creating New Matters

File > Matter > New Matter

Matters are used to coordinate client-related activities such as time and fees, disbursements, trust, billing, payments, and front office records. Matters must belong to a client. If the client does not exist in PCLaw already, a new client is created with the matter. If the client is already present in PCLaw, it can be assigned to the matter as the new matter is being created.

Use the New Matter module for adding matters to PCLaw. The New Matter window can contain as few fields as are considered mandatory, or additional fields from the Main and Billing tabs of Matter Manager can be added. Mandatory fields are:

- Matter Nickname
- Client Nickname
- Last Name or Company Name
- Responsible Lawyer
- Date Opened
- Type of Law
- Department.

The window may also display custom tabs, containing custom fields that are marked mandatory, if desired.

If the client requests that invoices are received in an electronic billing format, electronic billing tabs may be present.

For new systems, prior to closing the first month, a Matter Opening Balances tab is present.

Notes



Note: In order for a new matter to be created, it must be associated with a client.

You may print Case Labels and Mailing Labels using the 8 tabs of matter information. The minimum amount of information necessary is as follows:

- **Matter Number** - Date Opened
- **Client Number** - Responsible Lawyer
- **Type of Law** - Last Name/Company Name

Main Tab of New Matter

The Main tab appears when opening New Matter. All mandatory fields for creating a new matter are contained on the Main tab.



Note: In most instances, PCLaw assigns the next available matter and client number.

New Matter > Main tab

What You Should Know:

Matter

- Must be unique (alphanumeric) 12 characters maximum.

Client

- All matters that belong to the same client should have the same client number.
- Client nicknames have a six character maximum.

Default Rate

- Use a case rate rather than a specific dollar value.
- If a matter is categorized as an A rate file, then the default rate used in a time entry is the A rate for that timekeeper.
- The A rate for the timekeeper is specified in the Lawyer and Rates table.
- Rates can be overridden in the Split Lawyer Charges window, if desired.

Client Address

- A Company/Person field has been included within this window.
- If both a Last name and Company name have been filled in, users have to option to display this client as either the person or company.
- Buttons have been included and linked to Phone Call Manager (from phone numbers) and e-mails, if applicable.

Alias

- Alias is a PCLaw 12 text field that can be used for alternate names or to differentiate clients from each other.
- Alias is included as part of the Client Display Name for Matter Pop Up Help.
- It is not available as a filter or displayed as content on any PCLaw report.
- A Client Alias token can be added to billing templates, however it is not found on templates by default.

Categories

- Categories is a PCLaw 12 Pop Up Help list.
- Select a category from the drop-down list to classify the client.
- Items on the Categories list can be added or modified on the Options > Lists > Category Codes menu.
- A new template has been added to the List of Clients, which displays the assigned categories along with other client details.

New Matter Defaults

- Set default values, for the client, for selected fields.

Conflict

- Click to open the Conflict Search window.

Billing Tab of New Matter

The Billing tab appears on the New Matter window only if billing fields are selected to be shown on the New Matter Settings window on the Matter tab of Options > System Settings.

Options specific to billing are covered in the Virtual Training 3 - Billing session.

Billing tab of New Matter

What You Should Know:

Bill Settings

- Accept the default Matter Bill Settings profile or select a different profile for this matter.
- If the Billing tab is not included on the New Matter window, this option appears on the Main tab.

Allow Bill Settings Overrides

- Check to allow selections of individual billing options on the Billing tab of Matter Manager.

Frequency

- Select the interval from the drop-down menu to set the matter's billing frequency.

Billing Template

- Select to assign a default billing template to the matter.

Allow Bill Setting Overrides

- Check to enable the remaining fields on the Billing tab to modify values from the selected bill settings layout.

Split Lawyer Charges

- Click to assign automatic allocation of time and fee charges using the Split Lawyer Charges window.
- Allocations do not need to add to 100%.

Rate Exceptions

- Click to assign automatic allocation of time and fee charges using the Split Lawyer Charges window.
- Allocations do not need to add to 100%.

Custom Tabs of New Matter

A Custom tab appears on the New Matter window if two conditions are present:

- **Add This Tab by Default For Matters or Add This Tab by Default for Clients** must be selected on the Custom Tab Layout window for one or more custom tabs.
- One or more of the custom tab fields must be marked as a required field.

The Custom tab that appears on the New Matter window comprises only the required fields of all the custom or electronic billing tabs enabled to default to the matter or client. The complete custom or electronic billing tab appears in Matter Manager. All non-required fields do not appear in the New Matter window, and must be entered in Matter Manager.

Opening Balances Tab of New Matter

This tab is available only for a new set of books where a month has not been closed. Matter opening balances are for matters that existed prior to the start date for the set of books. The tab allows for the entry of previous accounts receivables, unbilled fees and disbursements, as well as trust balances for up to five trust accounts. Previous invoices can be added using their original issue date.

This window is also present on the Tools pull-down menu, and as a tab in the Matter Manager.

Behind the Scenes

When a matter is created in PCLaw, records are created in multiple data files to establish the matters. These files are linked to one another. Only the most prominent files are discussed here.

If the client is new to PCLaw, a record is created in the Person Information data file. This allows the client to also serve as a contact, and if required, as a vendor.

If a client is created at the same time as the matter, a record is added to the Client Information data file. If a matter is created for an existing client, then the new matter records are linked to the pre-existing client record.

For the matter, a record is created in the Matter Information data file, storing information contained on the Main, Billing, and Settings tab of the Matter Manager.



Tip: To work with custom tabs, select Custom Tabs on the Options pull-down menu.

A second record is created in the Matter Balances data file. This record stores the summary of all accounting transactions posted to the matter. This record exists for speed purposes, therefore PCLaw does not need to calculate matter balances on data entry and other windows. Information provided by the Client Summary, on the Reports > Client pull-down menu is pulled from this file.

Multiple records are created in the Address Information data file. One for the client address, if a new client is created for the matter, and separate records for each billing address assigned to the matter.

Common Troubleshooting:

Duplicate clients exist in PCLaw

Duplicate clients may exist if a new client is created for a new matter, when the client is already in the PCLaw database. Matters can be reassigned to existing clients using the Renumber Matters/ Clients wizard on the File > Matter pull-down menu.

Changing the Client Address for one matter changes the Billing Address for all matters belonging to that client

This occurs when the Billing Address is identical to the Client Address. If a change is implemented to the Client Address, PCLaw automatically writes the same change to the Billing Address. However, if the Billing Address is unique from the Client Address, a change in the Client Address is not applied to the Billing Address.

Client Summary does not reconcile to the Client Ledger

If the Client Summary and Client Ledger do not reconcile for one or more matters, or the Matter Summary panes in the data entry windows do not report the correct balance, then the matter balances need to be reset.

As described, the Client Summary and the Matter Summary panes retrieve information from the Matter Balances file. The Matter Balances data file stores balances only and not individual transactions. This architecture exists to increase the speed and performance of PCLaw.

The Client Ledger reads individual transactions and sums the value for each transaction type.

It may be possible that for whatever reason, an incorrect value is stored in the Matter Balances file. To rectify, select Verify Data Integrity on the Tools pull-down menu, and click the Reset Matter Bal button. You can reset balances on a matter, client, or firm level.

Matter Reporting

PCLaw provides multiple reports for displaying all facets of client and matter reporting including all purpose ledgers, dedicated WIP reports, and changes to the clients and matters themselves. Matter reports are grouped together on the Reports > Clients pull-down menu. Below is a sample of some of the available matter reports.

Client Ledger

The Client Ledger lists transactions by matter, including opening balances, disbursements, time and fees, billing, and payments. All accounting history pertaining to the matter is contained on the Client Ledger. The report can be created by matter, client, or responsible lawyer, for all dates or a specific period. A summarized ledger displays only matter and firm totals, or firm totals only. Options allow the user to view only time entries, disbursements, receipts, trust entries, or billed items.

Client Accounting Ledger

The Client Accounting Ledger displays G/L postings for matter transactions. Fees are displayed only after they are billed, while a running balance is provided for unbilled disbursements, receivables, trust, taxes and general retainers. Balances for both the report period and report end date are provided.

Client Summary

The Client Summary lists account balances for billed and unbilled fees and disbursements, accounts receivables, trust, and matter information. The report can be run by matter, client, or responsible lawyer, for all dates or for a specific end date.

List of Clients

The List of Clients report provides a list of clients and their relevant information. Included on the report are the client number and name, major client number, client introducing lawyer, and business phone numbers. When generating the report, you can choose to display client address, a list of associated matters, matter cross references, contacts associated with the matter, memos, and/or collection memos. The report can be run to include active, inactive, and archived matters. Purged matters are not included on the report. The Firm Summary quantifies the listed active, inactive, and archived matters.

Matter Status Report

The Matter Status Report provides an overview of the last entries to the matter with respect to data entry, billing, documents added, calendar events, notes, and memos. If requested, the Matter Status report also displays matter balances. The report is generated for the default entry date, but also includes post dated entries. Matters are included on the Matter Status report, if they have activity in the date range of the report.

Matters Opened Summary

This report displays the number of matters opened for a 12-month period. Values are provided for each lawyer, as client introducing, responsible, and assigned lawyer.

Matter Manager

Notes

Matter Manager in PCLaw is the core of the firms' practice. Matter Manager is a powerful yet easy to use tool that organizes and tracks all matter related information from one location.

Use Matter Manager to view and change:

- Accounting balances
- Client and matter contact information
- Appointments, tasks and to do's
- Case notes, memos, and collection notes
- Phone calls and messages
- Client ledger
- Related contacts and matters
- Documents, e-mail
- Custom information.

This module gives users instant access to all details relating to matter setup and data entry. Other tabs, such as those related to Billing, Calendar, Phone Call Manager, and Document Manager are discussed with each respective topic.

Main Tab of Matter Manager

File > Matter Manager > Main tab

The Main tab of Matter Manager holds critical information for the matter. Some of these fields are populated upon creating a new matter.

The screenshot displays the 'Main' tab of the Matter Manager application. The window title is 'Matter Manager - 05-1236.011 - Able and Able'. The interface features a menu bar with options like 'Matter', 'Entry', 'Report', 'Appt', 'To Do', 'Note', 'Conflict', 'Quick Step', 'Help', and 'Save/Close'. Below the menu bar, there are navigation buttons: 'Refresh', 'Load Last', 'Client Totals', and 'Label'. The main area is divided into several sections:

- Client Information:** Includes fields for 'Opened' (1/17/2005), 'Type of Law' (PIJP - Personal Injury - Plainti), 'Default Task' (BW - Billable Work), 'Default Rate' (A), 'Referral Type' (N/A), and 'Description' (Able v. State of Florida). It also has dropdowns for 'Client Introducing Lawyer', 'Matter Introducing Lawyer', 'Responsible Lawyer', 'Assigned Lawyer', and 'Other Staff', all set to 'RSB - Robert S. Brown'.
- Client Address:** Includes fields for 'Client Address', 'Matter Billing Address', and 'Second Matter Billing Address'.
- Client Details:** Includes fields for 'Client' (Title: First Barry, Middle B., Last Able; Alias: Able Personal; Firm Name: Able Consulting; Type Of Client: Person), 'Additional Name' (Title: First Elena, Middle, Last Able; Alias, Firm Name), and 'Display Client Name As' (Able and Able).
- Address:** Includes fields for 'Street' (1000 Hillside Rd.), 'City' (St. Paul), 'State' (MN), and 'Zip' (55101).
- Phone & E-mail:** Includes fields for 'Business' (612-555-9210), 'Home' (612-555-5658), 'Bus. Fax' (612-555-0418), 'Cell' (612-555-6936), 'Other' (612-555-9341), 'E-mail 1' (baryb@lawdemo.com), and 'E-mail 2'.

Main tab of Matter Manager

What You Should Know:

Matter Intro

- Is the lawyer who brings in additional matters for an existing client to the firm.
- Matter introducing lawyer can be one or more lawyers.
- Multiple lawyers may each receive a percentage of fees earned.
- Matter introducing lawyer is used for reporting purposes only.

Other Staff

- To have a user that exists within the security associated with this matter, enter the user name.
- Double-click to obtain a listing of available users.
- This user appears within the matter status reports.

Billing Address

- The billing address is specific for the matter.
- It can be different than the client address, and is used for billing purposes.

Second Billing Address

- Enable this tab to have PCLaw send a duplicate bill at the time of billing to this address.

Settings Tab of Matter Manager

File > Matter Manager > Settings Tab

Use the Settings tab to track additional information related to the matter. In addition to this information, this tab is also used for the Display Credit Hold Warning feature when entering charges.

Settings tab of Matter Manager

What You Should Know:

Physical File, Cross Reference, Court

- Use these areas as needed.
- They store text information that is on the matter file.
- Contents can be included on labels for a customized template.

Do Not Exchange Information with Other Programs

- If selected, changes to this matter are not exported to any linked software.

Allow General Retainers

- This is a new option for PCLaw 12.
- When Allow General Retainers is disabled on the Data Entry tab of System Settings, the restriction can be by-passed for individual matters by checking this box.
- Select the box to enable posting from the General Retainer module for this matter only.
- This option is not visible when general retainers are not restricted on the firm level.

Summary Tab of Matter Manager

File > Matter Manager > Summary tab

The Summary tab works as an interactive client summary. To access this tab, the user must be assigned rights to the Client Summary.

The screenshot displays the 'Summary' tab in the Matter Manager application. The window title is 'Matter Manager - 05-1236.011 - Able and Able'. The interface includes a navigation menu with 'Summary' selected. Below the menu is a table of financial data and a memo section.

Balances		Unbd Fees		Unbd Hrs		Last Billed	
Unbd Disb	9396.10	1310.00		9.00		11/30/2006	
Total Trust		Gen Rtnr		Rtnr Due		Last Entry	
10236.00		4703.05		0.00		10/1/2012	
Trust Bals		Int Paid		Int Due		Last Trust	
	10236.00	0.00		0.00		10/1/2012	
A/R Bal		Total Due					
0.00		0.00		0.00		0.00	

Memos | Collection Memos | Bill Memos | Pre-Bill Memos

Our client, Barry, was struck broadside by a Department of Transportation truck. We believe the driver of their vehicle was driving under the influence. The client was badly injured. Liability is a given, damages should be easy to prove. The only real outstanding issues are sovereign immunity and whether we will be able to hit the state for punitive damages.

Billing Instructions:
A copy of all invoices need to be sent to Mr. Able's personal attorney that handles his tax issues. Do not include time entries specific to other Matters, if some of the time is shared, enter only the portion with a detailed description of the work performed.

Buttons: Inset Date, Cut, Copy, Paste, Spell..., Print

Summary tab of Matter Manager

This tab is similar to the Matters tab in Client Manager.



Tip: The customizable Ledger tab for Matter Manager is available for version 9.30 and higher. Multiple Ledger tabs cannot be added to Matter Manager prior to this release.

Ledger Tabs

Users can add as many Ledger tabs to a matter as required. Each tab can have a different configuration as to what is listed on the tab, from type of entry, billed status, data range, and working lawyer. Each tab can have a unique name and be assigned to one or all matters. Like all optional tabs in Matter Manager, the Ledger tab can be added, hidden, or removed.

Ledger tabs are added by right clicking on any Matter Manager tab or through the Add Tabs.... tab.

Common tab of the Ledger Quick Tab Selections window

What You Should Know:

Name

- The name can be up to 20 characters in length.
- Best Practices recommends starting the tab name with Ledger to indicate that the tab is a Ledger tab.

Publish to User

- Select the staff member to whom this tab is to be made available.
- Leave this box empty to make the tab available to all staff.

Other Tab

- Click this tab to select the transaction types to list on the Ledger tab.

OK

- By default, the tab is applied to all matters for the selected user.
- However the tab can be hidden or removed from any matter.

Working With the Ledger Tab

The Ledger tab is similar to other grid tabs in Matter Manager. Refer to “Grid Tabs” on page 79.

Date	Entry #	Type	Paid To/Received From	Che/Rec#	Inv#	Expl. Code	Explanation	Amount
1/3/2001	101	Time	Lawyer: VCM 3:00 Hrs X 115.00		15		Discussion with Client	345.00
1/10/2001	102	Time	Lawyer: RSB 2:00 Hrs X 155.00		15		Meet to go over trial strategy	310.00
1/31/2001	100	Inv	Billing on Invoice 15		15		FEES 655.00	0.00
2/7/2001	216	Time	Lawyer: MCC 0:30 Hrs X 155.00		16		Get expert affidavit if needed	77.50
2/22/2001	217	Time	Lawyer: RSB 1:00 Hrs X 155.00		16		Send Interrogatories and other discovery	155.00
2/22/2001	218	Fee	Fees To Lawyer RSB		16		Draft Notice of Hearing	0.00
2/23/2001	219	Time	Lawyer: RSB 1:30 Hrs X 155.00		16		Meeting with client re settlement discussions	232.50
2/28/2001	215	Inv	Billing on Invoice 16		16		FEES 465.00	0.00
2/28/2001	321	Rcpt	Barry B. Able	00018			PMT - Receipt	655.00
2/28/2001	345	Rcpt	Barry B. Able	476			PMT - Receipt	465.00
2/28/2001	382	Trust Rcpt	Matter Opening Balance - Trust Receipt	1225			Receipt	1000.00
2/28/2001	384	Trust Dis	Matter Opening Balance - Trust Transfer	476			Automatic Apply Funds to AR	465.00
3/24/2001	187	Time	Lawyer: VCM 1:00 Hrs X 30.00		17		Meeting	30.00
3/31/2001	186	Inv	Billing on Invoice 17		17		FEES 30.00	0.00
3/31/2001	335	Rcpt	Barry B. Able	478			PMT - Receipt	30.00
3/31/2001	386	Trust Dis	Matter Opening Balance - Trust Transfer	478			Automatic Apply Funds to AR	30.00
5/16/2001	118	Time	Lawyer: MCC 0:30 Hrs X 155.00		18		Please get the docs ready for the production	77.50
5/31/2001	117	Inv	Billing on Invoice 18		18		FEES 77.50	0.00
5/31/2001	313	Rcpt	Barry B. Able	479			PMT - Receipt	77.50
5/31/2001	388	Trust Dis	Matter Opening Balance - Trust Transfer	479			Automatic Apply Funds to AR	77.50
6/2/2001	58	Time	Lawyer: VCM 2:00 Hrs X 30.00		19		Hearing on Motion to Compel Discovery	60.00

Ledger tab of Matter Manager

Use the Ledger tab to:

- View items as you would on the Client Ledger.
- Filter by transaction type, date, billed status, and working lawyer.
- Change or remove items as necessary.

Grid Tabs

Grid tabs list individual events and transactions for the matter in a grid format. The grid lists items associated with the active matter. The type of item is dependent on the tab and may be an event, transaction, contact, or matter. Certain rights in PCLaw must be assigned to access the different grid tabs.

The following tabs are categorized as grid tabs: Events, Calls, Notes, Time, All, Contacts, Related, Docs, E-mail, and Research.

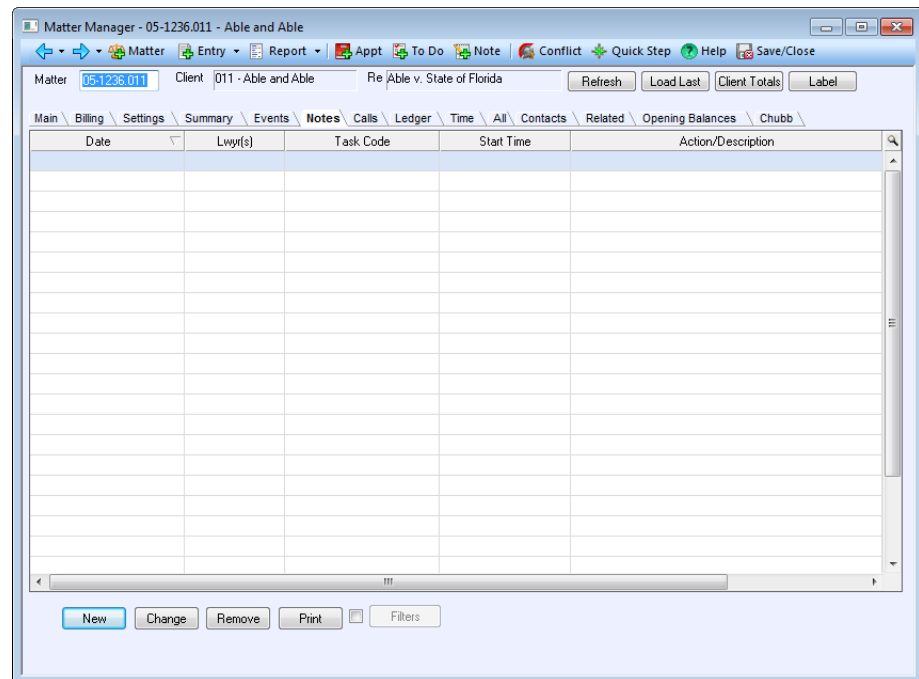
Notes Tab

File > Matter Manager > Notes Tab

With the Notes tab, create or edit notes associated with the active matter. To access the Notes tab, rights must be assigned to the user at *Data Entry > New Notes*.

Use the Notes tab to:

- View notes about the matter.
- Add, change or remove notes.
- Print a Notes Listing.



Notes tab

Time Tab

File > Matter Manager > Time tab

The Time tab provides greater detail for time and fee entries than the Ledger tab. Listed are all time and fee entries posted to the matter through the Time Sheet, Fee Sheet, Quick Timer, third party linked software, and other related features. To access the Time tab, rights must be assigned to the Time Listing.

Use the Time tab to:

- View time and fee entries.
- Add or change time entries.
- Print a Time Listing.

Date	Entry #	Matter	Lwyr	Task	Hours	Rate	Amount	Inv#	Expl. Code	Explanation	Notes	Hold
1/3/2006	101	05-1236.0	VCM	BW	3:00	115.00	345.00	15		Discussion w		No Hold
1/10/2006	102	05-1236.0	RSB	BW	2:00	155.00	310.00	15		Meet to go ov		No Hold
2/7/2006	216	05-1236.0	MCC	BW	0:30	155.00	77.50	16		Get expert aff		No Hold
2/22/2006	217	05-1236.0	RSB	BW	1:00	155.00	155.00	16		Send Interrog		No Hold
2/22/2006	218	05-1236.0	RSB	BW	0:00	155.00	0.00	16		Draft Notice c		No Hold
2/23/2006	219	05-1236.0	RSB	BW	1:30	155.00	232.50	16		Meeting with		No Hold
3/24/2006	187	05-1236.0	VCM	BW	1:00	30.00	30.00	17		Meeting		No Hold
5/16/2006	118	05-1236.0	MCC	BW	0:30	155.00	77.50	18		Please get th		No Hold
6/2/2006	58	05-1236.0	VCM	BW	2:00	30.00	60.00	19		Hearing on M		No Hold
6/30/2006	59	05-1236.0	VCM	BW	0:30	75.00	37.50	19		File Complain		No Hold
7/21/2006	61	05-1236.0	RSB	BW	1:00	155.00	155.00	20		Initial Propos		No Hold
9/28/2006	74	05-1236.0	RSB	BW	0:48	155.00	124.00	21		File Notice of		No Hold
10/5/2006	365	05-1236.0	RSB	BW	2:00	155.00	310.00			Court		No Hold
10/23/2006	83	05-1236.0	MCC	BW	1:00	155.00	155.00	22		Answer Due		No Hold
10/23/2006	84	05-1236.0	RSB	BW	1:00	155.00	155.00	22		Answer Due		No Hold
11/6/2006	16	05-1236.0	RSB	BW	0:36	155.00	93.00	23		Discovery du		No Hold
11/7/2006	17	05-1236.0	VCM	BW	0:24	75.00	30.00	23		Check to see		No Hold
5/2/2012	445	05-1236.0	MCC	BW	2:00	100.00	200.00		atc	Attendance e		No Hold
5/3/2012	444	05-1236.0	MCC	BW	4:00	75.00	300.00		mwc	Meeting with		No Hold
5/4/2012	446	05-1236.0	MCC	BW	1:00	500.00	500.00		lr	Legal Resear		No Hold

Time tab

All Tab

File > Matter Manager > All Tab

The All tab displays client ledger transactions, calendar events, and notes associated with the matter.

Use the All tab to:

- View client ledger entries, calendar events, and notes.
- Change any unbilled ledger entry, calendar event, or note.

Related Tab

File > Matter Manager > Related tab

The Related tab enables the user to work with matters assigned to the same client as the active matter. To access the Related tab, rights must be assigned to the List of Clients report.

Use the Related tab to:

- List all matters associated to this client.
- Select a different matter with the same client nickname.
- Add a new matter with the same client nickname.
- Change matter information.
- Print a List of Clients for the current client.

Custom Tabs

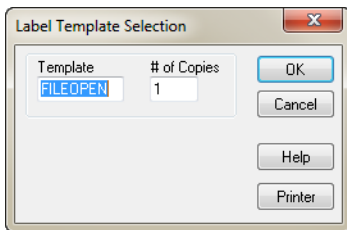
User defined tabs can be created through the Custom Tabs feature, and added manually to existing matters, or automatically for newly created matters. Adding and removing custom tabs may be restricted through the Matter Manager tab of PCLaw in Security > Advanced Settings.

Other Matter Tools

Printing Labels

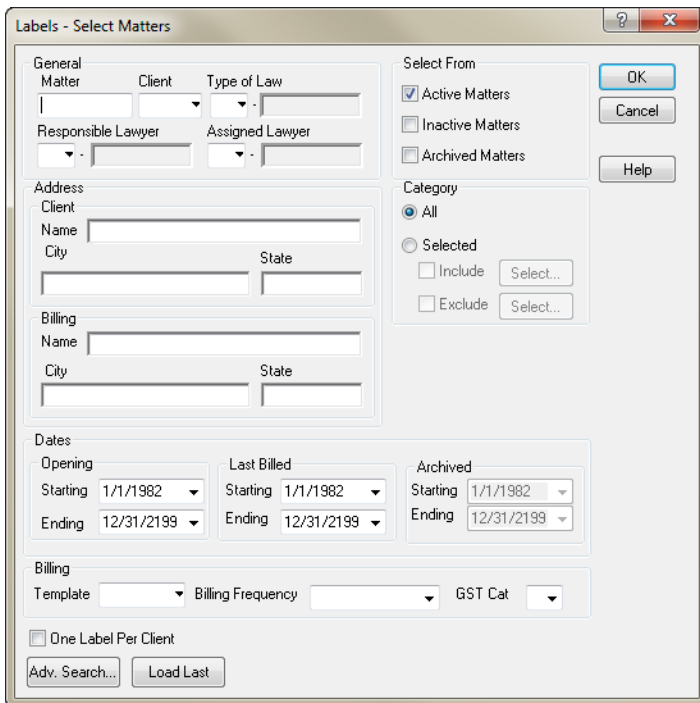
Matter information can be printed on a label format provided by PCLaw or on a custom label the firm designs itself using Template Editor. Multiple copies of a label can be printed. Labels can be produced for all matters, matters associated to a specific client, lawyer or type of law, matters meeting specific billing parameters, and matters from specific places.

The first stage when printing labels, whether from the File > Matter pull-down menu, or from within Matter Manager or the New Matter window, is to select what you would like to print with regards to the template and number of copies.



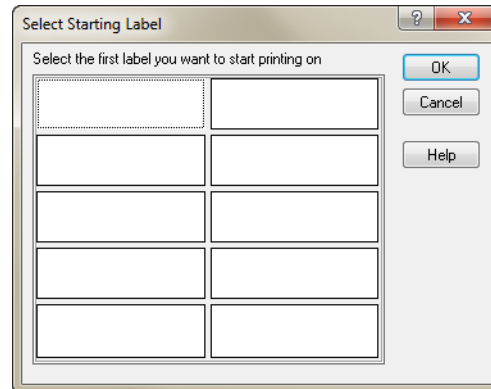
Label Template Selection window

The *Labels > Select Matters* window appears only when printing mass labels from the File > Matter pull-down menu. When printing labels from within Matter Manager or New Matter, labels are printed for the currently selected matter in these modules.



Labels > Select Matters window

The Select Starting Label window appears if the selected template contains multiple labels on one sheet.



Select Starting Label window

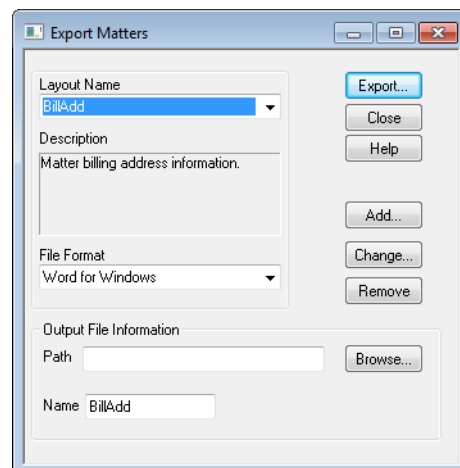
Select the first label where to start printing by clicking the related pane on the screen.

Exporting Matter Information

File > Matter > Export

Matter information may be sent to a word processor or spreadsheet. Using the Export Matter feature, the user may choose what information is exported, save his/her selections as a layout for future use, or use layouts provided by PCLaw.

Most matter information, added and viewed on the grid tabs of Matter Manager can be exported to a word processor or spreadsheet. Selected information is saved on a layout. PCLaw provides several layouts for the Export Matter feature. The firm can use one of these layouts or customize and use its own layout.



Export Matters window

What You Should Know:

File Format

- Select the export application to use from the drop-down list.
- Existing options include:
 - WordPerfect 4.2 for WordPerfect
 - Word for Windows 6.0 for Microsoft Word
 - CSV for spreadsheet applications.
- For word processing programs, note that the exported file is not itself a word processor file. It is a file that can be merged into the variable fields in the word processor document to produce form letters, mail labels etc. Refer to the WordPerfect or Word documentation for more information using merge files.
- For database programs, the exported file is a comma-separated variable (CSV) file that can be read by many database applications. Refer to the database documentation to verify if the firm's database supports CSV files.

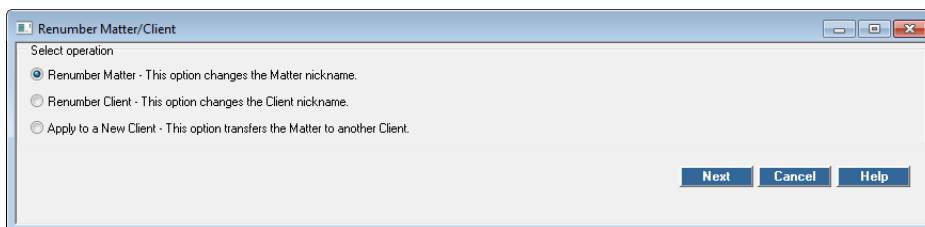
Creating/Changing Layouts

- If an existing layout does not suit the firm's needs, the firm can create its own, then add the matter fields to include.
- The firm may also modify the existing layout.
- To create or change a layout, you must first be in the Export Matters window.
- The process has two steps:
 - Setting the layout information on the Layout tab.
 - Choosing the fields to include in the export on the Main, Address, Selections, Charge, Contacts, and Custom tabs.

Renumbering Matters and Clients

File > Matter > Renumber Matter/Client

After a matter is opened, it is no longer possible to change its nickname or its associated client in New Matter or Matter Manager. PCLaw provides a tool, Renumber Matter/Client, to perform this task. This feature can also change the nickname of the client while retaining its matter associations.



Renumber Matter/Client window

What You Should Know:

Changing the Matter Nickname

- Select this option to change the matter nickname while retaining the matter's association to the same client.

Changing Client Numbers

- Select this option to change the client nickname while retaining client information and matter associations.

Assigning a Matter to a Different Client

- This option enables the user to reassign a matter including all name, address, and accounting information to another client.
- Check from the list of matters from the original client to reassign to the new client.

Global Change Matters

File > Matter > Global Change

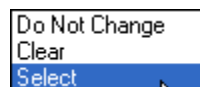
Using Global Change Matters, a user can change information on a client, lawyer, billing profile, or firm level. Most matter settings contained on the Main and Billing tabs of Matter Manager, along with selected options on the Settings tab may be changed globally.

On the Select Matters to View window, the user selects whether to apply the change by client, lawyer, matter bill setting, or firm.



Select Matters to View window

Selections in Global Change are comprised of either drop-down or check boxes. Each drop-down box offers three choices:



Do Not Change

- This is the default settings for all boxes.
- The current individual matter settings do not change for any box with this option.

Clear

- Option deselects the setting for the box.

Select

- Option turns on the setting for the box.
- For data entry boxes, select the check box to the left of the field name to enable the data entry box then select the new setting.

Matter Tab of the Register**Data Entry > Register > Matter Tab**

The register is a central location from which a user may access entries that have been entered into PCLaw. The Matter tab of the Register displays matters associated to a client or responsible lawyer.

Use the Matter tab to change matter information. Print out a List of Clients of matters listed for the selected criteria, or to sort matters under a different category, click the column heading.

Matter	Client	Yes Lw	aw Typ	Description	Home	Business	E-mail	Fax
011-001	011 - Able and Able	RSB	corp	Able vs State of Minnesota	612-555-5656	612-555-9210	barryb@lawd	612-555-0418
011-002	011 - Able and Able	RSB	corp	Able v Taylor	612-555-5656	612-555-9210	barryb@lawd	612-555-0418
05-1236.1	011 - Able and Able	RSB	PIJP	Able v. State of Florida	612-555-5656	612-555-9210	barryb@lawd	612-555-0418

Matter: 011-001 Client: 011 Name: Able and ...
 Re Line: * Credit Hold * Able vs State of Minnesota
 T/Bals:
 Unbld D: 1250.00 A/R: 0.00 Gen Rtrn: 0.00 Trust: 0.00

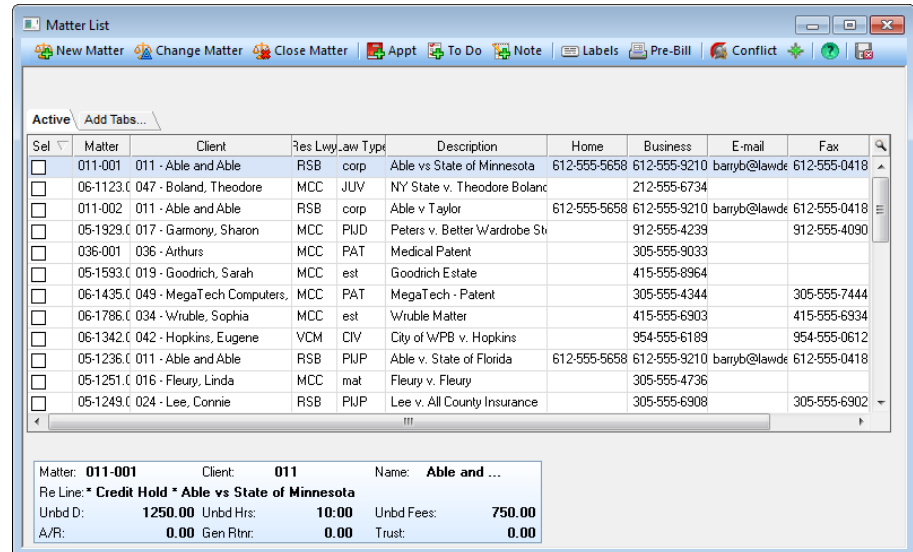
Matter tab**Matter List****File > Matter List**

Create customizable lists of matters based on clients, lawyers, types of law, departments, referral types, or relevant dates. Save these lists as Quick Tabs for easy reference. Use Matter List to perform tasks on multiple matters simultaneously, such as changing information in Matter Manager through Global Change, closing matters, printing labels, and pre-bills. Creating appointments, to do's, notes, and conflict searches can be performed on individual



Tip: Matters cannot be removed using the Matter tab. To close a matter, use the Close Matter module on the File > Matter pull-down menu.

matters. Matters can be sorted by any of the column criteria, including matter nickname, client, responsible lawyer, and type of law.



Matter List

Matter List Toolbar

Use the toolbar in Matter List to perform tasks with multiple matters, such as global change, closing matters, printing labels and pre-bills, as well as tasks for single matters, such as appointments, to do's, and conflict searches. When selecting multiple matters, the icons for single matter functions are disabled.

Adding Quick Tabs

If Quick Tabs in the Matter List are hidden, an Add Tabs window appears when opening the list. Or to add additional tabs to Matter List, click the Add Tabs tab to advance to the Add Tabs window. On the Add Tabs window, existing Quick Tabs can be added or new Quick Tabs can be created.

Use Quick Tabs to create matter lists based on selected matters or clients, lawyers, types of law, departments, relevant dates, and other criteria. Criteria for the tab is grouped under Common, Matter, and Other tabs, containing similar functionality to other PCLaw features.

Exercise 1

The following exercise requires that you install a new PCLaw set of books and then populate it with preliminary PCLaw data.

Task 1

Task 1 is reviewed at the start of Virtual Training 2 - Data Entry.

1. Install a new set of books for PCLaw by running the Setup file either directly from the Common folder, or by selecting PCLaw Setup on the All Programs > LexisNexis > PCLaw.

If PCLaw is not already installed on your computer, download the installation files from <http://PCLaw.com/techpage.htm>.

2. Type, on the Enter Product Key screen, the serial number 10EMO-z63yw-zz8cm-5koi5-2tcfm-00000-zzz44-zz1r6.
3. Select to create a new set of books.
4. On the following Preparation Wizard screens, add the following information where required:
 - Select *New York* for the state. Leave the remaining address information blank.
 - Enable G/L Accounting.
 - Select *Jan 2010* for the System Start Date.
 - The firm is to be a Partnership.
 - Do not add any additional bank accounts at this stage.
 - The firm wishes to use the Cash method of accounting.
 - Taxes are not applicable.
 - Add the first time keeper, *Peter Charles Law (PCL)* with an A and B rate of \$500 and \$300 respectively. Create Partner accounts for this timekeeper.
 - Type and confirm password of *PCLaw* for Peter Charles Law. Type and confirm password of *Admin* for the Admin user.
 - Disable PCLaw Front Office and Safe Custody Manager features.
5. Complete the preparation process.
6. Log into PCLaw as the administrator.

Task 2

1. Add the following groups into PCLaw Security.
 - *Time and Expense Entries* - This group is responsible for time and expenses entries, including notes. They are able to correct their entries using the Register. This group is not permitted to use any data entry feature that affects the general or trust bank.

Notes

- *Senior Level* - This group is assigned all tasks except for System Settings, and items on the Options > Administrator menu.

2. Add or modify the following users to PCLaw Security:

- *Jamie Younger* - Add to Senior Level group
- *Claire Tindale* - Add to Time and Expense Entries group
- *Peter Charles Law* - Move from Admin to Senior Level group. Change his description to display his full name.

Use the person's initials for the user name, and their full name for their description. Passwords are at your discretion.

Task 3

1. The following information needs to be added or options enabled in this set of books on the firm level.

- Federal Identification Number (FIN) - 123234345456.
- Enable the separation of Hard and Soft Costs.
- Include Vendors in Paid To Pop Up Help.
- Make the name and all address fields mandatory for all matters.
- Matter nicknames should include the client number.
- All matter addresses should default to the city of Buffalo.
- Matter files can be destroyed 7 years after the matter is closed.

Task 4

1. Change the account name of *General Bank Account 1* to *First National Checking Account*.
2. Change *General Bank Account 2* to *General Bank Account 99*.
3. Add *General Bank Account 2* with the following information.
 - G/L account - 1001
 - Account Name - *General Investment Certificates*
 - Department - *Investment*
4. Change the name of *Trust Bank Account 1* to *Main IOLTA Trust Account*.
5. Add *Trust Bank Account 2* with the following information.
 - G/L account - 1101
 - Account Name - *First National Trust Account*
 - Department - *Firm*

Task 5

1. Add the following timekeepers to PCLaw, using their initials for the nickname.
 - *Stephanie S. Black* - Partner, A Rate \$400, B Rate \$200, C Rate \$100. Use draw and equity accounts.
 - *Jamie A. Younger* - Associate, A Rate \$300, B Rate, \$150, C Rate \$75. Do not use draw and equity accounts.
2. Make changes to Peter Charles Law rates as follows:
 - Add a C Rate of \$150.
 - Implement future rate changes for the A, B, and C rates of \$600, \$400, \$200 respectively, effective *Jan 1, 2011*.

Task 6

1. Peter Charles Law has brought the following major client to the firm. As of yet, there are no assigned matters. Enter the client into PCLaw.

Great Lakes Coffee Corner (GLCC), 216 Payne Street, Suite 18, North Tonawanda, NY. 14120, Attn. William Crill.

The responsible lawyer for all matters assigned to this client should default to Stephanie Black. Assign 100 for the client number, and all associated clients should follow the 100 series in sequence.
2. *GLCC # 16*, located at 112 River Rd in Lewiston, NY, has had a suit filed against it by Elmer Netherby. Jamie Younger will be the working lawyer on this case. The firm will use its A billing rate for this client.
3. *GLCC* wants to open a new franchise, # 29, in West Seneca, NY, and needs some preliminary real estate work done on possible locations on Main St. Stephanie Black will handle all work for this case.
4. *Damien Hawerchuk*, of 172 Pearl St. in Buffalo, has asked to firm to assist in divorce proceedings against his wife, Natalie. Jamie Younger introduced this client to the firm and will be handling all tasks. She will be charging her B rate. Assign 200 to this client.
5. *GLCC* has dismissed its chief financial officer, John Wails, and has asked the firm to oversee all legal issues, regarding this matter. Peter Charles Law will handle the case personally, using his A rate.
6. Run a list of clients to view all clients and matters.

