

PCLaw[®] Front Office

PCLaw 12 New Certification Training
Virtual Training - Lesson 5



**Business of Law Software Solutions
Practice Management**

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Introduction to Front Office

Notes

PCLaw Front Office is a dynamic suite of modules and tools designed to enhance the organizing ability of the law firm.

Front Office begins with the managing of the firm's contacts. Contacts are far reaching in PCLaw, touching every matter, client, document, and message. Clients and vendors are contacts, and contacts can be much more.

The Calendar best tracks the demands on time for each timekeeper and evaluates the results against a daily goal.

Document Manager organizes electronic documentation, e-mails, precedent templates, and saved research.

Phone Call Manager and Message Manger tracks both external and internal communications.

Finally, Safe Custody Manager is an all encompassing method for managing physical items in the firm's possession.

PCLaw Front Office is the best selling Front Office software for firms with one to five timekeepers.

Objectives:

Upon completion of this lesson you will be able to:

- Manage contacts
- Track time using the Calendar
- Manage both internal and external messaging
- Manage electronic documentation and physical property.

Front Office Settings

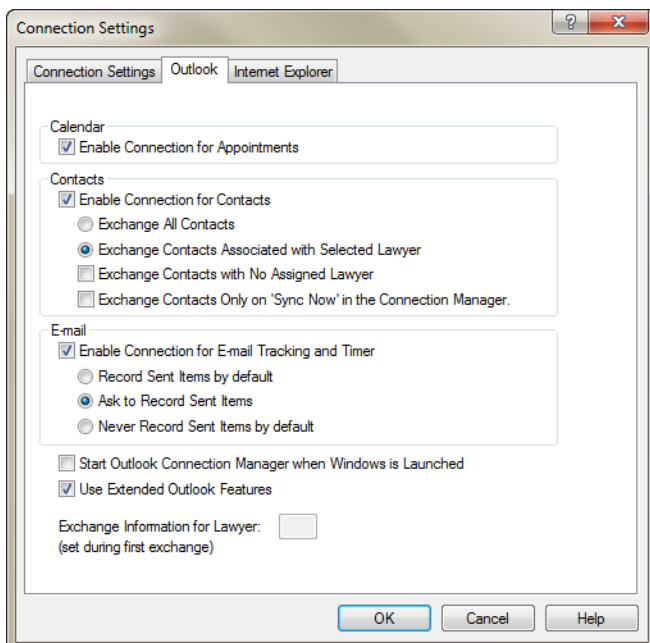
PCLaw Front Office contains tools such as Calendar, Phone Call Manager, Message Manager, and Document Manager. This topic details the settings for enabling and configuring these modules prior to using any Front Office module. You will also learn how to use codes for the Calendar and Documents Manager, as well use the dedicated tabs in System Settings and Workstation Settings for Front Office. Codes for Safe Custody Manager are described in a later topic.

Outlook Tab of Connection Settings

Options > Connection Settings > Outlook Tab

Use the Outlook Tab to define information exchange between PCLaw and Microsoft Outlook. This tab enables the exchange of appointments and contacts, and the tracking of e-mail between these two programs.

In order to exchange information between the PCLaw Calendar and Microsoft Outlook, you must go to the “Connection Settings Tab” and check “Use This Set of Books When Connecting to Other Programs.”



Outlook tab of Connection Settings

What You Should Know:

Enable Connection for Appointments

- Select to exchange appointments between PCLaw and Microsoft Outlook.

Exchange All Contacts

- Select to exchange all contacts between PCLaw and Microsoft Outlook.

Enable Connection for E-mail Tracking and Time

- Select to record time spent processing e-mails.
- Saves e-mails to PCLaw.

Record Sent Items by Default

- Automatically records outgoing e-mail to PCLaw.
- When an e-mail is sent, an Add PCLaw Document window opens immediately.

Ask to Record Sent Items

- Select to have PCLaw prompt you prior to saving an outgoing e-mail.
- At the time that the prompt appears, the e-mail has already been sent.
- Clicking Yes or No on the Save e-mail to PCLaw prompt has no bearing on the delivery of the e-mail.

Never Record Sent Items by Default if chosen, no e-mails are recorded in PCLaw.

- The e-mail is saved in Microsoft Outlook, and can be saved in PCLaw at a later date.

Use Extended Outlook Features

- Allow PCLaw access to Microsoft Outlook without Outlook prompting you for permission.
- For convenience, this option should always be checked.

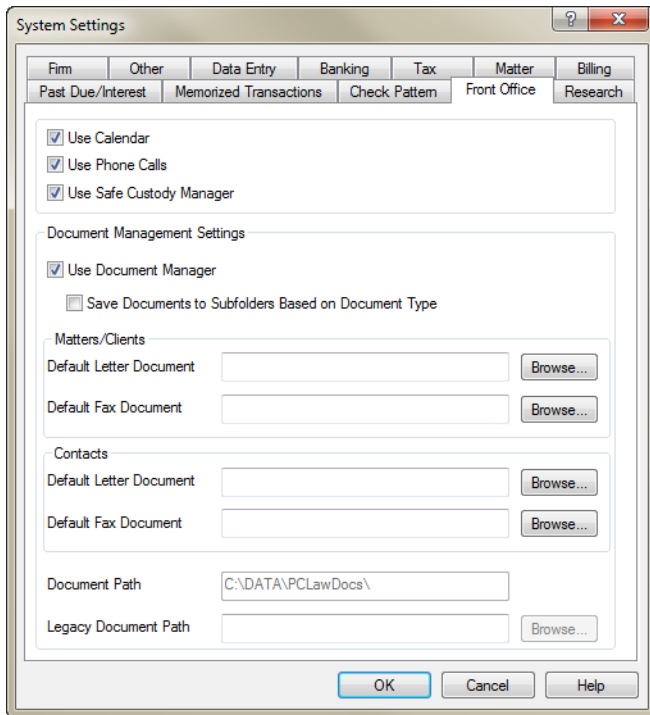
Exchange Information for Lawyer

- Displays the default assigned lawyer for this workstation.
- The lawyer is assigned when Connection Manager is enabled for the first time. PCLaw prompts you to select a lawyer when closing the Connection Manager window.

Front Office Tab of System Settings

Options > System Settings > Front Office Tab

Use the Front Office Tab to enable the Calendar, Phone Call Manager, Document Manager, and Safe Custody Manager. Additional Document Manager destinations are set on this tab.



Front Office Tab of System Settings

What You Should Know:

Save Documents to Subfolders based on Document Type

- Click the check box to enable the creation of document subfolders based on document types selected when saving a document.

Default Letter/Fax Document

- The file name of the sample letter provided with PCLaw is displayed.
- A new document based on this precedent will be initiated when Letter/Fax is selected from the Quick Docs button within Matter Manager or Contact Manager.
- A fax document is also available when clicking a Fax button on one of the Address tabs in Client, Matter, or Contact Manger.
- *Use This Set of Books when Connecting with Other Programs* and *Enable Connection with Microsoft Word* must be checked for Quick Docs to be available on the toolbar of any Manager.
- *Use Phone Calls* must be checked on the Front Office Tab for any of the phone buttons to be available on any Address Tab.

Document Path

- Enter path name of the folder in which documents will be saved by Document Manager.
- Subfolders for each client and each matter will be automatically created under this designated Document Path when saved by Document Manager.

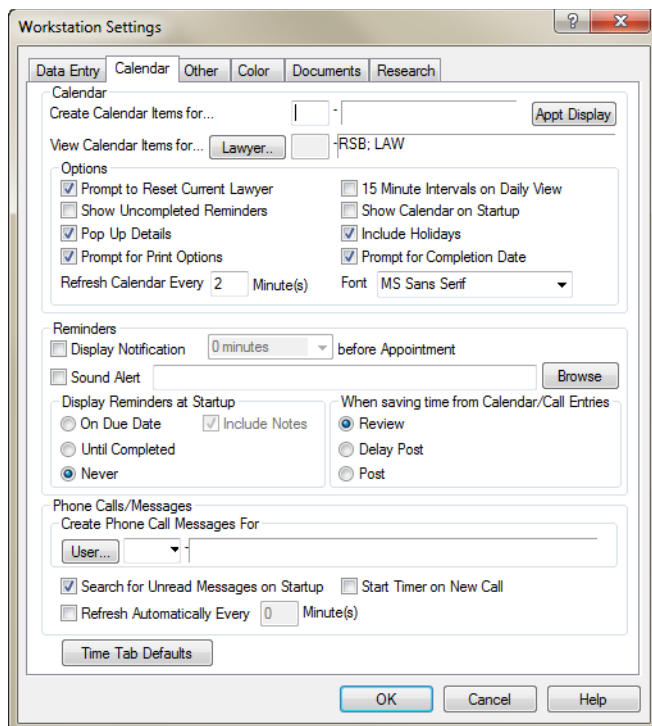
Legacy Document Path

- Enter the path name of the folder in which your old or Legacy word processing documents are stored.

Calendar Tab of Workstation Settings

Options > Workstation Settings > Calendar Tab

Use the Calendar Tab to personalize the Calendar for your workstation, including setting the default timekeepers, prompts when launching PCLaw, and reminders. Also included on this tab are options for customizing the Phone Call Manager.



Calendar Tab of Workstation Settings

What You Should Know:

Calendar

Create Calendar Items

- This choice is the default timekeeper for the calendar entries when this user enters a calendar item.

View calendar items

- Shows only this timekeeper's appointments (by default) on the calendar.
- Shows all appointments, if left blank.

Show uncompleted reminders

- Exhibits all uncompleted reminders in the reminder section of the calendar, until they are marked as completed.

Prompt for Print Options

- Displays the Appointment Schedule Selection window when you click the Print button in the Calendar.

Include Holidays

- Allows you to include statutory holidays for your country on the Calendar.
- First import holidays in the Holiday Pop Up Help window on the Options > Lists pull-down menu.
- Refer to “Holidays” on page 14 for more information.

Prompt for Completion Date

- PCLaw prompts you to enter a completion date, after checking a “To Do” as complete.

Display Reminders at Startup

- Controls the appointment reminders report to appear on startup of PCLaw.

When saving time from Calendar Entries

- Allows you to select whether to review entries, delay post, or post when attaching appointments to time entries.

Phone Calls/Messages**Create Phone Call Messages For**

- Controls who the default user to whom messages are sent.

Search for Unread Messages on Startup

- Allows you to check for unread phone messages when you launch PCLaw.

Start Timer on New Call

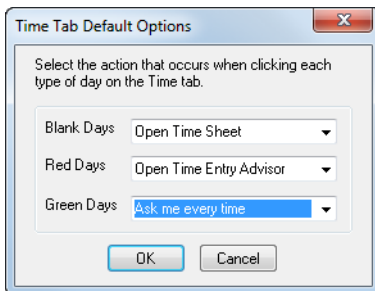
- Enables you to automatically start the timer when you create a new phone call.

Time Tab Defaults

Options > Workstation Settings > Calendar Tab

The Time Tab defaults determine what actions PCLaw takes when the user clicks a square on the Time tab of the Calendar. These options can be set from within the Time tab, when PCLaw prompts the user for an action and allows the choice to be saved as the default. Once the default is set, the prompt no longer appears.

The Time Tab Default Options window is a portal through which these selections can subsequently be changed.



Time Tab Default Options window

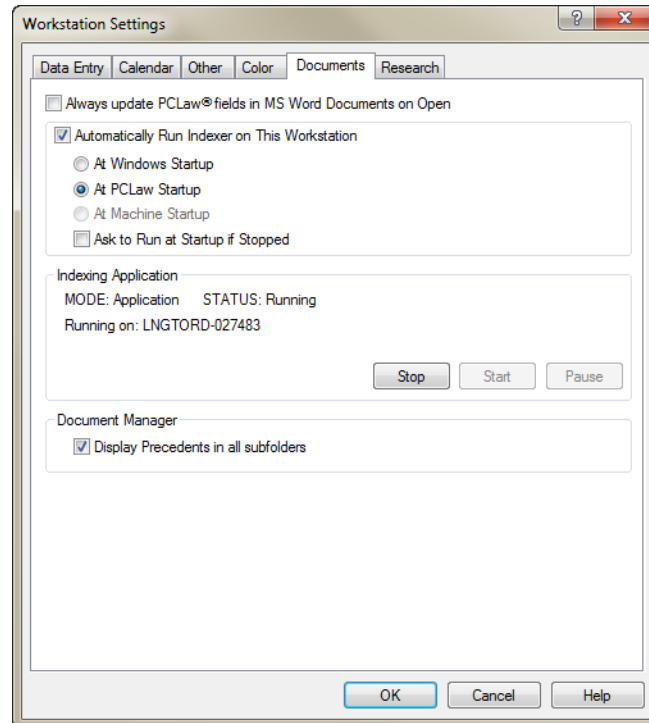
Different defaults can be assigned by type of day on the Time tab. Blank days are future days on the calendar. Red days indicate the timekeeper's targeted hours have not been met for the day. Green days indicate the goal has been met.

The options for each type of day are Open to Time Sheet, Open Time Entry Advisor, or Ask me every time.

Documents Tab of Workstation Settings

Options > Workstation Settings > Documents Tab

Use the Documents Tab to control the PCLaw toolbar, indexing options, and how precedents are handled in the directory structure.



Documents Tab of Workstation Settings

What You Should Know:

Always Update PCLaw Fields in MS Word Documents on Open

- Deselected by default, maintains the document in its original state, if the PCLaw coded information is contained in the saved copy.
- If selected, this option will always update the PCLaw populated fields with new information when a document is opened for viewing.

Indexer Settings

- Enables the preferences for running the Document Indexer on this workstation.

Automatically Run Indexer on This Station

- Enables this setting on only one station running PCLaw.

At Windows Startup/PCLaw Startup/Machine Startup

- Depending on the Selection, the indexer will start up either when Windows starts, PCLaw starts, or when the computer is turned on.

Ask to Run at Startup if Stopped

- Prompts the user to start Indexer, if stopped during previous session.

Indexing Application

- Reports the status of the Indexer and identifies the name of the computer where the Indexer is enabled.

Start/Stop/Pause Buttons

- Indexer controls for the computer.

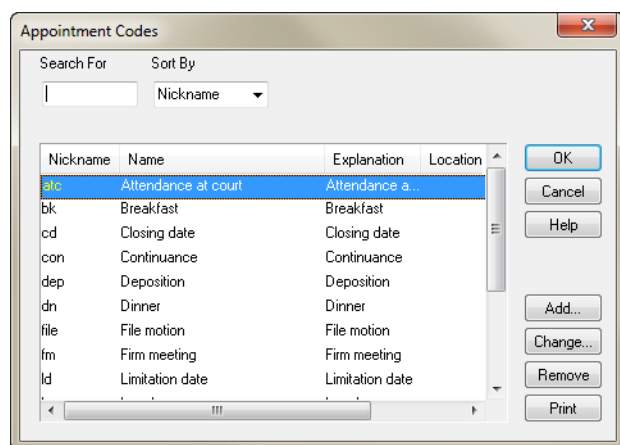
Display Precedents in all subfolders

- PCLaw displays precedents in document subfolders rather than just the root folder.

Appointment Codes

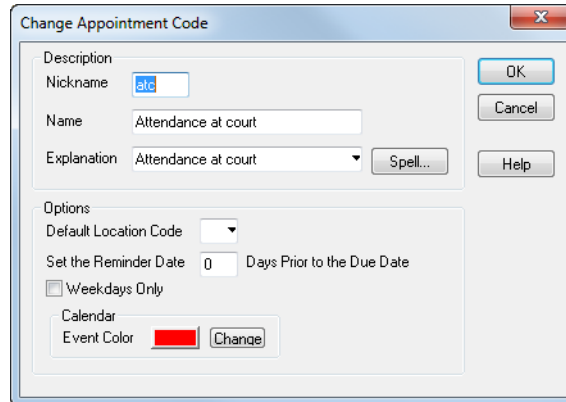
Options > Lists > Appointment Codes

Appointment Codes are used with the PCLaw Calendaring to categorize the type of appointment. For example, if a staff member is going to the courthouse to pay for filing fees, a filing fee code may be associated with this calendar entry. For reporting purposes, the Appointment Listing may be filtered by appointment code.



Appointment Codes window

Use the New Appointment Code and Change Appointment Code windows, respectively, to create and maintain appointment codes.



Change Appointment Code window

What You Should Know:

Default Location Code

- Allows you to select a location code to associate this code to a location.

Set the Reminder Date

- Allows you to select the number of days prior to the due date for PCLaw to calculate the Reminder Date.

Weekdays Only

- PCLaw uses only business days when calculating the reminder date, when you select this option.

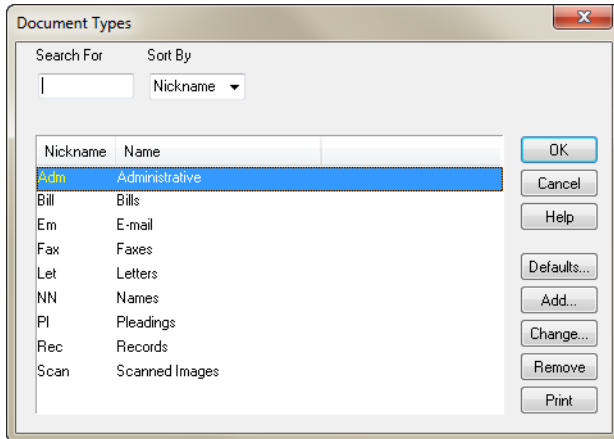
Calendar > Event Color

- On the Calendar, if only one lawyer is selected, events are displayed using the color assigned to the Appointment codes.
- However, if multiple lawyers are selected, the view changes to show events in the colors assigned to each timekeeper on the General tab of the Lawyers and Rates module.

Document Types

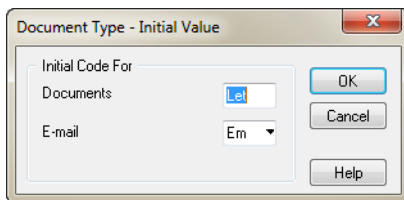
Options > Lists > Document Types

When saving documents, each may be categorized into different groups. A listing of the default types of documents is located in the Document Types list.



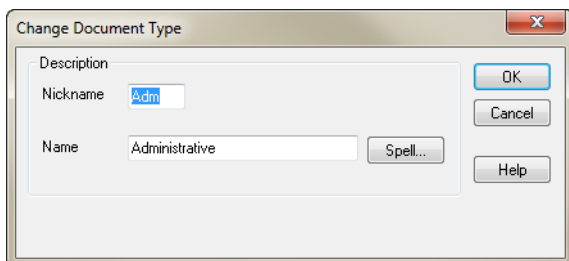
Document Types window

Click the Defaults button to set the initial default codes for documents and e-mails using the Document Type – Initial Value window.



Document Type - Initial Value window

Use the Add Document Type and Change Document Type windows to create and maintain the document type nickname and names, respectively.

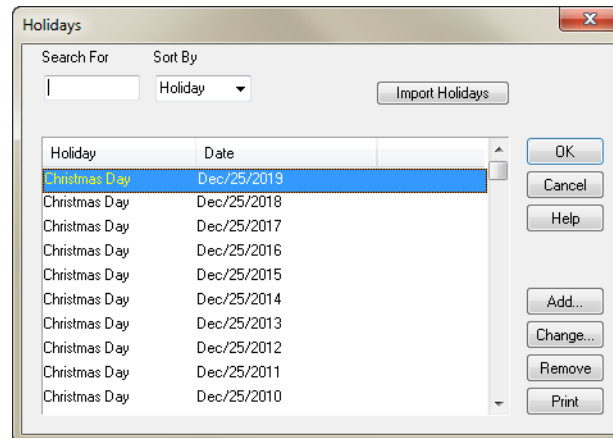


Change Document Type window

Holidays

Options > Lists > Holidays

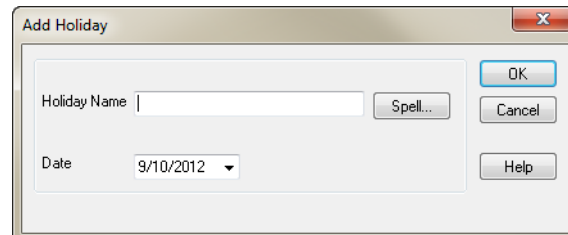
Use the Holidays feature to maintain a file of holidays for use with the Calendar. This listing is customizable and can flag critical dates on the calendar to warn users when attempting to enter appointments on those dates.



Holidays Window

Click to populate the Holiday pane according to the country designated when creating your set of books.

Use the Add Holiday and Change Holiday windows to create and/or modify holidays.



Add Holiday Window

Once the Holidays list is imported and has been set, it still must be enabled for the Calendar by checking Include Holidays on the Workstation Settings Calendar tab. Refer to “Calendar Tab of Workstation Settings” on page 7 for more information.

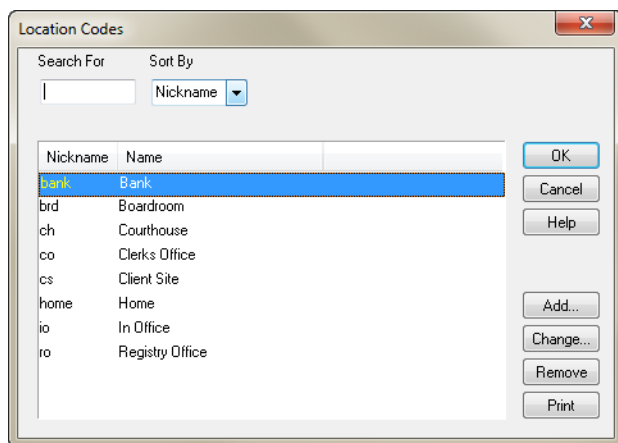
With this option enabled, warnings will now appear when creating Calendar events on days listed as Holidays.

Location Codes

Options > Lists > Location Codes

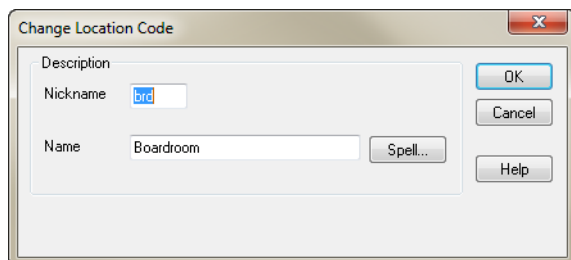
Use Location Codes to indicate where an appointment is to take place. For example, if the appointment is scheduled to take place in the boardroom, the code for the boardroom may be associated with the appointment. Reports may then be run for a particular location to check availability.

Location codes have a second use for storing packets in the Safe Custody Manager. As a result, a location code may also be a safety deposit box, a filing cabinet, or a storeroom.



Location Codes window

Use the Add Location and Change Location windows to create and/or modify locations.

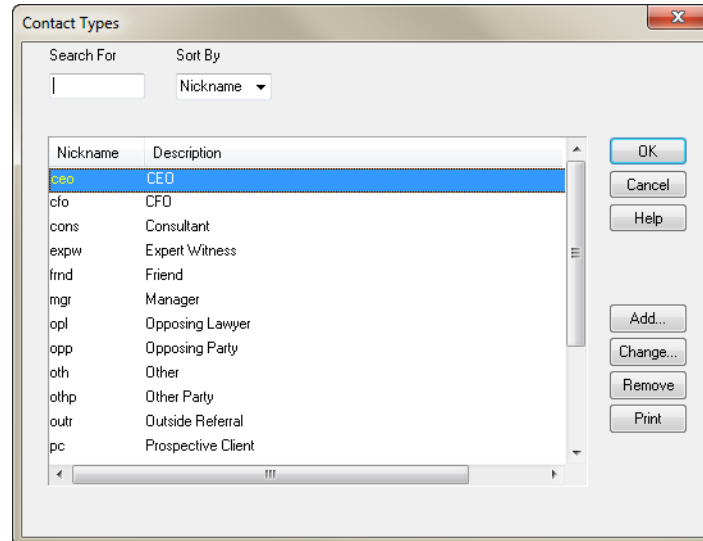


Add Location Code Window

Contact Types

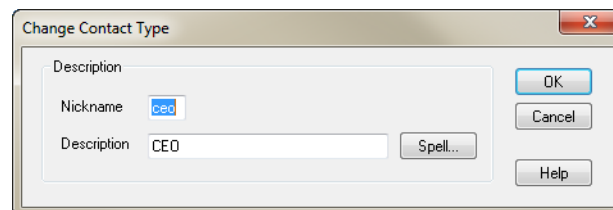
Options > Lists > Contact Types

Use Contact Types to categorize contacts into related groups. For example, a contact in PCLaw may be categorized as an expert witness, and a report may be run to display all expert witnesses.



Contact Types window

Use the New Contact Type and Change Contact Types windows to create and maintain the contact type nickname and description, respectively.



Change Contact window

Contacts

To work with contacts is to encompass many PCLaw features.

Contact Manager is the central module for creating and maintaining contacts in PCLaw. Use Contact Manager to work with pure contacts or with contacts that are also vendors and/or clients. In addition to storing phone and address information, Contacts allow users to view and modify matter associations, related phone calls, e-mails, and documents.

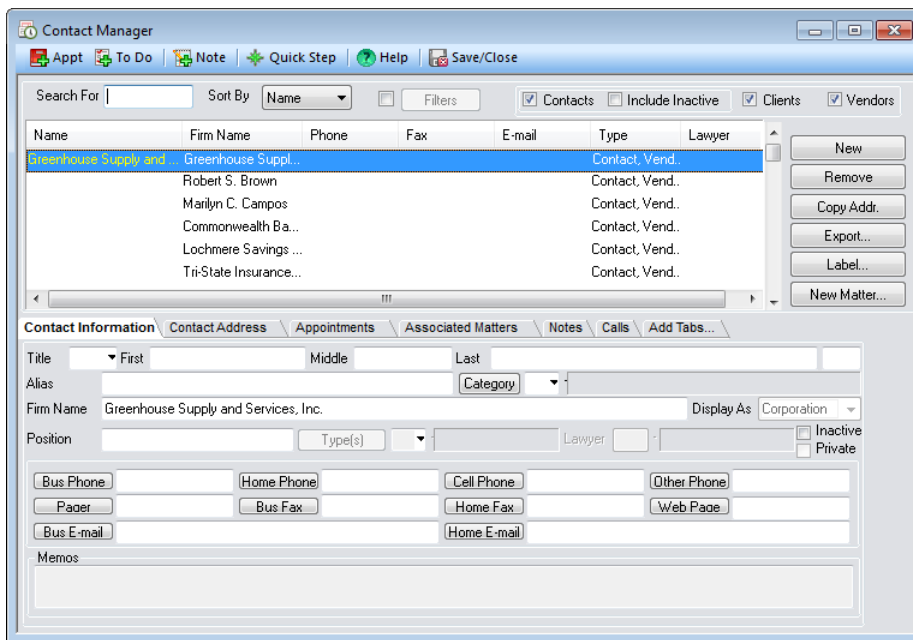
Contacts may also be maintained on a matter basis on the Contacts Tab of Matter Manager.

Finally, use the Contact Listing to compile reports on contacts within PCLaw by choosing parameters.

Contact Manager

File > Contact Manager

Contact Manager provides a centralized contact management system to track and manage contacts related to your firm. These contacts may be associated with both appointments and matters.



Contact Manager window

What You Should Know:

New

- Click this option to create a new contact using the Contact Information window.
- Refer to “Adding Contacts” on page 19 for more information.

Export

- Click this option to export contact information to a word processing or spreadsheet application.

Label

- Select this option to create labels for existing contacts.

Inactive

- Check this box to make the currently selected contact inactive.
- The contact is not deleted from PCLaw, merely removed from current contact lists.

Include Inactive

- Check this box to include on the contact list, any contact that is marked as Inactive.
- This box is only available if the Contacts box is also checked.

New Matter

- Click this option to add a matter to PCLaw using the New Matter window.

Contact Information Tab

- Click this tab to view name, phone, and Internet information for the contact.

Contact Address Tab

- Choose this tab to view the contact's main and secondary address.

Appointments Tab

- Click this tab to view Calendar events associated with this contact.

Associated Matters Tab

- Click this tab to view all matters associated with this contact.
- Matters can be associated with contacts either through this tab or using the Contacts Tab of Matter Manager.

Notes Tab

- Click this tab to view notes associated with this contact.

Calls Tab

- Click this tab to view phone events associated with this contact.

What You Should Know:

Inactive contacts can only be viewed from Contact Manager. The Contacts box must be checked on the filtering bar before the option to Include Inactive is enabled. Inactive contacts cannot be viewed by themselves. This option is not associated with the Clients or Vendors check boxes.

No prerequisite is required for making a contact inactive. When the Inactive box is selected, the contact is removed from the list as soon as another contact is highlighted, unless the Include Inactive option is checked on the filtering bar. A contact can be reactivated by deselecting the Inactive check box.

Adding Contacts

File > Contact Manager > New

Use this window to add new contacts to PCLaw. Once the contact information is in place, it may be associated with both appointments and matters for this contact.

Contact Information window

What You Should Know

Name

- Type the contact's *Title, First, Middle, and Last* name, if the contact is a person.
- Type the organization name, if the contact is a firm.
- Indicate the preferred name to use if the contact has both a person and firm name from the *Display As* drop-down menu.

Alias

- Alias is a text field that can be used for alternate names or to differentiate contacts from each other.

Categories

- 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.

Position

- Type the contact's position or occupation.

Type(s)

- Click to designate the contact type using the Contact Types window.

Lawyer

- Select the timekeeper to associate with the contact.
- This is an optional field.

Private

- The contact may be made private for the specified attorney.
- Only users with access to the lawyer's private files will be able to see this contact.

Main Tab

- Complete the primary address for the contact.

Other Tab

- Complete the secondary address for the contact, if applicable.

Memos

- Type any additional notes about the contact.
- Contact memos appear on the Contact Information Tab of Contact Manager and on the Contacts Tab of Matter Manager, if the contact is associated with a matter.

Associating Contacts with Appointments

When creating a new appointment, in the New Appointment window, select the contact or contacts that are to be associated with the appointment.

To associate contacts with the appointment, click the Contact(s) button. Contact Manager opens, allowing the selected contact to be associated with the appointment.

To clear the contact, click Contact(s) and deselect the selected contacts.

Contacts Tab of Matter Manager

File > Matter Manager > Contacts Tab

With the Contacts Tab, work with contacts associated with the active matter.

Use the Contacts Tab to:

- View contacts associated with the matter.
- Add, change, or remove contacts.
- Associate a contact with a matter.
- Print a Contact Listing for the associated matters.

Name	Firm Name	Phone (Bus.)	Phone (Home)	E-mail	Fax	Type	Lwyr	Role
English, Nigel	State Attorney's Office	305-555-6442		nigele@lawdemo.com	305-555-6452			
Hernandez, Anthony								Witness
Redmond, Carl	State of Florida	305-555-5257			305-555-6542			
State of Florida	State of Florida	850-555-9874			850-555-7542			

Title: Nigel English
 Firm Name: State Attorney's Office
 Position: Lawyer
 Contact Type: Inactive Private
 (Bus. Phone) 305-555-6442 (Home Phone) (Cell Phone) 305-555-6879 (Other Phone) 305-555-1002
 Pager 305-555-3456 (Bus. Fax) 305-555-6453 (Home Fax) (Web Page) www.timematters.com
 (Bus. E-mail) nigele@lawdemo.com (Home E-mail)

Change Add Roles

Contacts tab of Matter Manager

Contact Reporting

Contact Listing

Reports > Contact Listing

Use the Contact Listing to run a report on contacts. This report can display associated matters, clients, and attorneys. It can also be run by contact type and date.

The Contact Listing displays contact information and associated matters.

List of Contact Types

Options > Lists > Contact Types

Printed from the Contact Types window, the List of Contact Types displays contact type nickname and description.

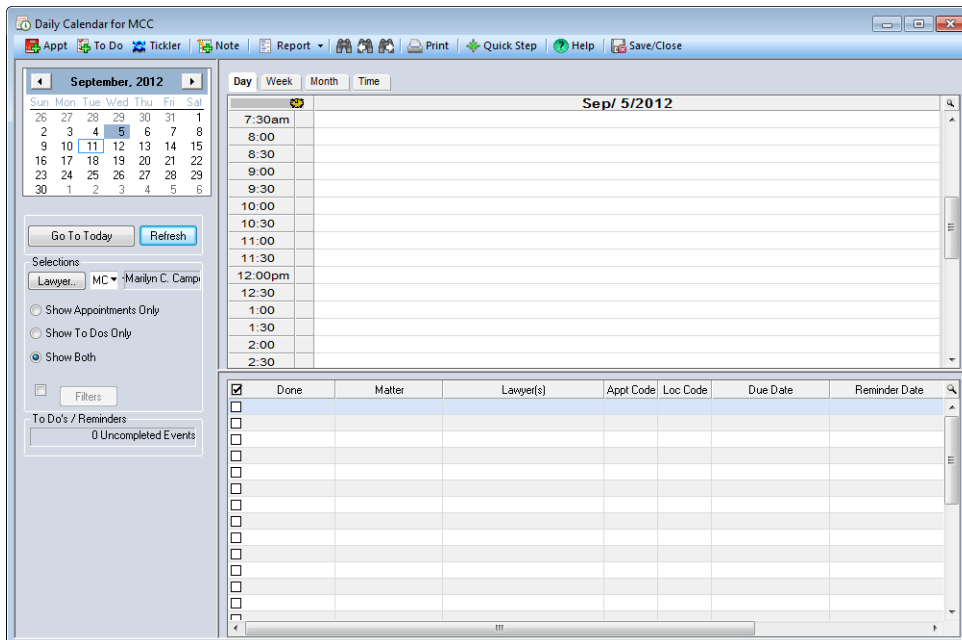
Calendar

The Calendar is a multi-purpose scheduler that keeps track of appointments, such as client meetings, court appearances, meal engagements, other activities, and notes. The Calendar centrally manages appointments for all of your firm's timekeepers from one location in the PCLaw database. This tool makes scheduling group appointments, reminders of critical dates, uncompleted and/or overdue tasks, and reports very easy. All appointments may be linked to matters through our seamless integration and converted into billable entries on the client's ledger.

Navigating the Calendar Window

The Calendar window can be broken down into several separate components, all fitting together to provide the client with the vital information he/she needs to manage his/her day, week, or month. The components are:

- Toolbar
- Selecting a view
- Reference Calendar
- Appointment area
- To Do and Reminder area



Calendar Window displaying the Daily view

Calendar contains the same functionality in PCLaw 12 as it did in previous versions, except all options were moved to the left panel to better accommodate the Appointment and To Do panes. The Reference Calendar now only shows a single month at a glance.

Notes



Note: To create Calendar events for a lawyer, the Use Calendar option must be checked on the *Lawyers and Rates > General Tab*.

Toolbar

The toolbar provides quick access to features both within and outside the Calendar.



Calendar Toolbar

Selecting a View

The Lawyer box defaults to the lawyer(s) selected in the View Calendar Items For area of the Workstation Settings > Calendar Tab. The Lawyer button is replaced by a Lawyer box when the Time Tab is active.



Lawyer area which determines what information appears in the Calendar

What You Should Know:

Refresh

- Click this button to update the Calendar window.

Lawyer

- Allows selection of timekeeper(s), to display their events on the Events lists.
- Only one timekeeper can be selected for the Time tab.

Filters

- To restrict the events that appear on the Calendar, use the Advanced Selections window.

Show Appointments Only

- Click this button to hide the To Dos section of the Calendar.

Show To Dos Only

- Click this button to hide the Appointments area of the Calendar.

Show Both

- Click this button to display both the Appointments and the To Dos areas of the Calendar.

Calendar Area

The Calendar Area gives an at-a-glance overview of the current date, the selected date for the calendar view, and scheduled appointments.

September, 2012						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Calendar Area

What You Should Know:

Dates

- Click a date on the Calendar to display appointments for that day, week, or month.
- For PCLaw 12, today's date is boxed in blue 11 .
- For PCLaw 11 and lower, today's date is circled in red 11 .
- For PCLaw 12, the selected date is boxed in blue 20 .
- For PCLaw 11 and lower, the selected date is in blue 17 .
- Dates containing appointments are bolded.

Appointment Area

The Appointment Area displays appointments for a day, a week, or a month, and compares time posted against a daily goal. If Include Holidays is selected in System Settings, the holiday is displayed on the required day on both the Day and Week view. For event details to appear, Show Pop Up Details must be selected on the *Options > Workstation Settings > Calendar Tab*.

What You Should Know:

Day

- List appointments for a single day.
- A single day is displayed, divided into half hour intervals.



Week

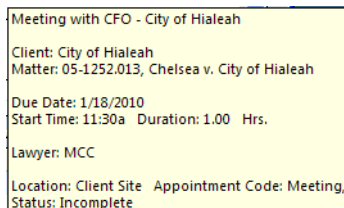
- List appointments for an entire week.
- For PCLaw 12, the user has a choice between a five day and a seven day view.
- The five day view excludes Saturday and Sunday, and cannot be changed to any other day.
- For PCLaw 11 and lower, a seven day view is displayed starting with the date selected in the Calendar area.

Month

- List appointments for a calendar month.
- A calendar month is displayed, containing the date selected in the Calendar area.

Appointments

- Double click an appointment to open the Change Appointment window.
- Change the appointment time by dragging the appointment to another time slot.
- Track changes to appointments by selecting Continuance on the Change Appointment window. Refer to “Continuances” on page 44 for more information.
- *For the Day tab only:* Change either the start time of an appointment by dragging the top border of the appointment.
- *For the Day tab only:* Change the end time of an appointment by dragging the bottom border of the appointment.
- Convert an appointment to a time entry by right-clicking the appointment.
 - Select *Change Appointment*.
 - In the Change Appointment window, click *Post Time*.
 - You are returned to the Calendar window. A  appears next to the appointment. On the Day tab, you can also click in the  column to the left of the appointment.
- To view details of an event, place the cursor over the event.
- A summary of the event appears.



Event Summary Pop Up

To Do and Reminder Area

To dos and reminders appear in the To Do area. This list can display all completed and uncompleted events, uncompleted events only, or items specific to the selected calendar date.

What You Should Know:

New To Do

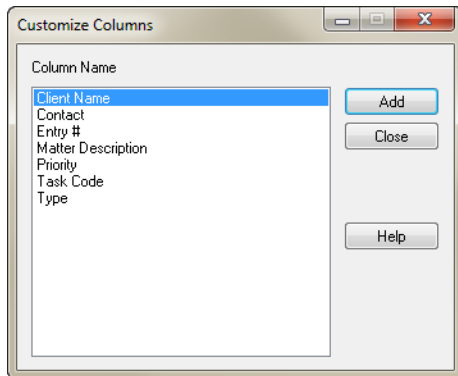
- Create a new to do by double-clicking a blank line in the To Do area.

Reminder

- Create a new reminder by completing the Reminder Date box. Enter a date prior to the due date of the new appointment or to do.
- The words *Reminder about* accompany the text.

Add Column

- Right-click the column heading and select Customize Columns to produce the Customize Columns window.



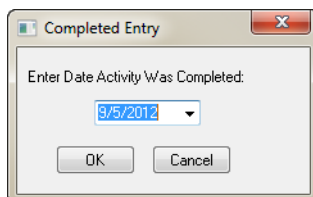
Customize Columns window

Restore Columns

- Right-click and select Restore Columns to restore columns to their default settings and size.

Done

- Mark a to do completed by clicking the check box in this column to the left of the to do to open a Completed Entry window:



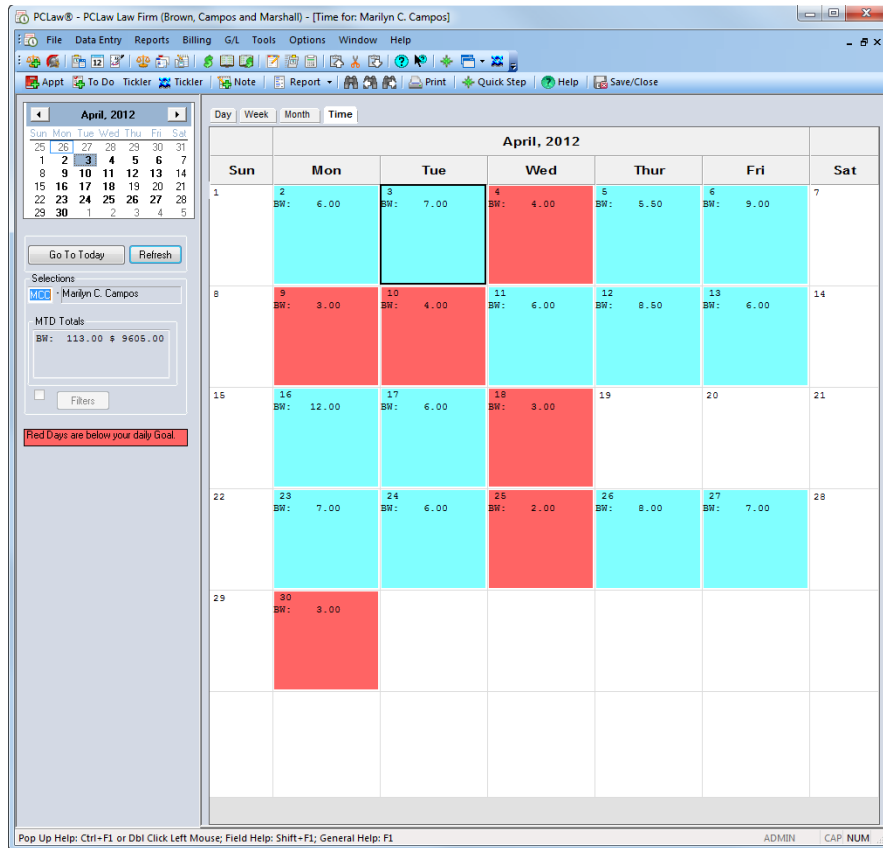
Completed Entry window

- In the *Enter Date Activity Was Completed* box, enter or accept the completion date.
- Uncompleted To Do's remain on the To Do area until marked as completed or removed.

The Time Tab

File > Calendar > Time Tab

Use the Time tab to compare posted time to a set goal. The parameters for the Time tab differ from the Day, Week, and Month tabs.



Time tab of Calendar

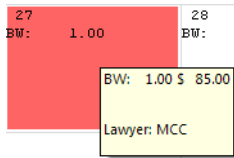
Goals for the Time tab are set on the Accounting tab of Lawyers and Rates. Only one lawyer can be viewed at a time on the Time tab.

Similar to the other Calendar view, the Time tab is comprised of several central components.

For the day's time summary to appear, Show Pop Up Details must be selected on the *Options > Workstation Settings > Calendar Tab*.

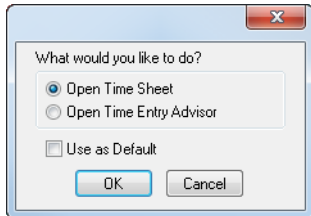
- The Time tab displays each day in a calendar month.
- Posted hours and time value are displayed for each day.
- The sum of billable and non-billable tasks are separated.
- A daily goal is set on the Accounting tab of Lawyers and Rates.
- Hours posted for the day that do not meet the daily goal appear in red.
- Days when the goal is met are displayed in the selected color of the lawyer.

To view a summary of the day's time, place the cursor over the day:



Daily Summary Detail on the Time Tab

With PCLaw 12, users can now click on a day, and choose to either open the Time Sheet or the Time Entry Advisor, and to make either the default action going forward.



PCLaw confirmation prompt

Right-clicking on any square also gives the user options to access Create New Entry or Time Entry Advisor.

Creating Appointments and To Dos

File > Calendar > New Appointment

Appointments may be created through the Calendar, the Appointment Sheet, or by clicking the Appt icon on the toolbar of many PCLaw modules.

New Appointment Window



Tip: Double-clicking in the Date box opens the Date Calculator.

The appointment appears on the Calendar on its allotted day and time. An appointment is considered complete once its due date has passed. The user is not required to manually mark the appointment as completed.

What You Should Know:

Type

- Click the To Do box to convert the appointment to a to do.

Private

- Check to restrict access to details of this event to only users who have private security access.

Add Tickler

- Click to create a template for a series of related events.
- Tickler in PCLaw 12 is the former Linked Dates module presented in a wizard format.
- Refer to “Creating a Tickler” on page 35 for more information.

Recurrence

- Click to create a recurring entry.
- Refer to “Working With Recurring Events” on page 31 for more information.

Duration

- Set a duration for the event by selecting the length of time.
- For example, 1.0 represents 1 hour, 0.5 represents 30 minutes, .25 represents 15 minutes, etc.

Reminder Date

- Have PCLaw remind you of the event on a day prior to the event by selecting the date.

Priority

- Classify the event priority as Low, Normal, or High by selecting the category from the drop-down list.

Show Alert

- Check to be alerted of the event prior to its start time.
- Select the time interval, in minutes, from the adjacent box.

Post Time

- Click to convert the event to a time entry.
- PCLaw displays a Time Sheet window for reviewing the entry.

Behind the Scenes:

Appointments and to dos are both saved as individual records in the Appointment Entry data file. The two event types are differentiated by a flag. When an appointment is changed to a to do or vice versa, the flag is changed. The remaining record remains as is. If an appointment is converted to a time entry, a new record is created in the Time Entry data file, as described in the eLearning 2 Data Entry session.

Working With Recurring Events

Recurring events may occur at fixed intervals throughout the year. The Calendar provides the ability to schedule recurring events, making it unnecessary to constantly re-enter repeating appointments or to dos.

Creating a Recurring Event

Appointment/To Do > Recurring button

Recurring events can be created from new or existing appointments or to dos. In the New or Change Appointment or To Do window, click the Recurring button.

Recurring Events window

What You Should Know:

Every

- Set the frequency for the event to occur by typing the number.
- For example, type 2 to have the event recur every second day, week, month, or year.

Repeats

- Set the unit for the event to occur by selecting any of the following:
 - Calendar Day
 - Business Day
 - Week
 - Month
 - Year
- If Week is selected as the unit, from the *On* drop-down box, choose the day of the week when the event occurs by selecting the day.

Weekly Recurring Events

- If Month is selected as the unit, in the *On* box, choose the date of the month when the event occurs by selecting the date from the drop-down list.

Monthly Recurring Events by Date

- Or -

In the *On the* box, select the day of the week when the event occurs from the drop-down list.

Monthly Recurring Events by Day

- If Year is selected as the unit, in the *On* box, choose the date when the event occurs by selecting the date from the drop-down list.

Yearly Recurring Events by Date

- Or -

In the *On the* box, select the day of the week of the month when the event occurs from the drop-down list.

Yearly Recurring Events by Day

Start Date

- Set the date for the first recurring event by typing or selecting the date.

End of the Series

The end of the series can be determined by choosing one of the following:

- *End Date* - Select a date in the adjacent box.
- *End After* - Type the number of times for the event to repeat in the Occurrences box.
- *No End* - Select to make the event ongoing.

Make this adjustment if the date falls on the weekend

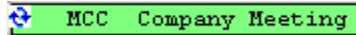
- If the event is required to fall on a business day, select one of the following:
 - Move Forward
 - Move Back
 - Closest
 - Skip
- If Include Holidays is selected on the *Options > Workstation Settings > Calendar Tab*, the listed holidays are not counted as business days.
- If the option is not selected, then holidays are counted as business days.

OK

- Save your work in this session by clicking this button.
- The New Appointment - Recurring Event window appears:

New Appointment - Recurring Event window

- Complete the applicable boxes as you would for a typical appointment.
- Only the Lawyer(s) box and one of Action or Appt Code boxes requires an entry.
- To finalize the recurring event, click OK.
- Each recurring event appears on the Calendar with double circling arrows to indicate it is one of a series of recurring events.



Modifying Recurring Events

Appointment/To Do

When modifying a recurring event, it is possible to affect a single event in the series or the series as a whole. Events can be modified by double-clicking or right-clicking on the event.



Open Recurring Appointment prompt

Deleting Recurring Events

Appointment/To Do

When removing a recurring event, it is possible to affect a single event in the series or the series as a whole. Events can be removed by right clicking on the event.

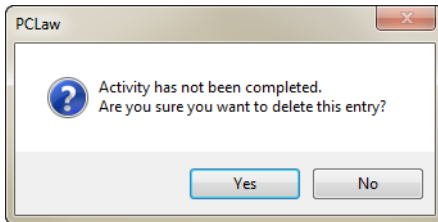


Remove Recurring Appointment Prompt



Note: It is not possible to remove a series from the Register. Deleting an event in the Register affects only the one occurrence and not the series.

If one or more events have yet to reach their due date, a confirmation prompt appears.



PCLaw Confirmation prompt

Behind the Scenes:

A new record is created in the Appointment Entry data file for each recurring event. Each event stands as its own appointment or to do, as well as being linked to the other events in the series.

Creating a Tickler

The Tickler is a PCLaw 12 feature that replaces the Linked Dates module on the Calendar, displaying options in a more user-friendly wizard format.

Using the Tickler, the user can create an event template to link dates for any series of appointments or to do's that are dependent on each other and follow a set time frame. For example, a real estate purchase cannot be closed until the property has been searched for liens, so the two events are dependent on each other and the average time needed to complete a lien search can be determined.

When defining a series of linked events, the series must first be assigned a meaningful template name. Next, activities are added to the template, and each is assigned a name and duration. A base date is used to calculate all other due dates. It can be either the start date or completion date of the series of tasks.

Finally, with the event template established, the Tickler wizard is used to create the series of calendar entries automatically for a matter.

Opening the Tickler

File > Tickler

From the Create a Tickler page, the Tickler wizard connects an existing template to a matter and base date, creates a new template, if needed.

Create a Tickler - Step 1 of 3

Select Template

Matter: [dropdown] Lawyer(s)... [button] VCM [dropdown]
 Base Date: 3/22/2012 Start Time: 9:00a
 Duration: 0.50

Template: Real Estate Closing [dropdown] [Edit]

Event	Due Date
Closing Date	+0 Days
Order Title Search	+0 Days
Dispatch Search Letters	+0 Days
Review Survey	+0 Days
Confirm Insurance Binder	+0 Days
Prepare Draft Mortgage	+0 Days
Prepare Closing Documents	+0 Days

Matter: Client: Name:
 Re Line:

[Add Template] [OK] [Cancel] [Help]

Create a Tickler - Step 1 of 3 screen

Matter

- Enter the matter nickname, which the recurring events apply.
- Double-click the field to open the Pop-Up-Help matters window.

Lawyers

- Click the button to add one or more lawyers to the Tickler.

Base Date

- Type or select the base date for the Tickler.
- The Base Date is the date, which all other events are calculated in the Tickler.

Start Time

- Set a default start time for all the events included in the Tickler.
- Events are not assigned individual start times.

Duration

- Set a default duration for all the events included in the Tickler.
- Durations can also be set individually for each event.

Template

- Select a template to use for this matter from the drop-down list of existing Tickler templates.
- All events for the selected template are listed in the Event section.
- To remove templates from the drop-down list, click the Edit button to access the Edit Tickler Template window.

Edit

- Click the button to open the Edit Tickler Template window to modify any saved template:
 - Adding new templates.
 - Changing the name of the template.
 - Adding or removing events.
 - Changing details for individual events.
 - Removing a template.
- Refer to *“Managing Tickler Templates” on page 40* for more details.

Add Template

- Click to open the Tickler Template window to create a new template.
- This window can also be accessed from the Edit Tickler Template window.

Creating a New Template

File > Tickler > Add Template

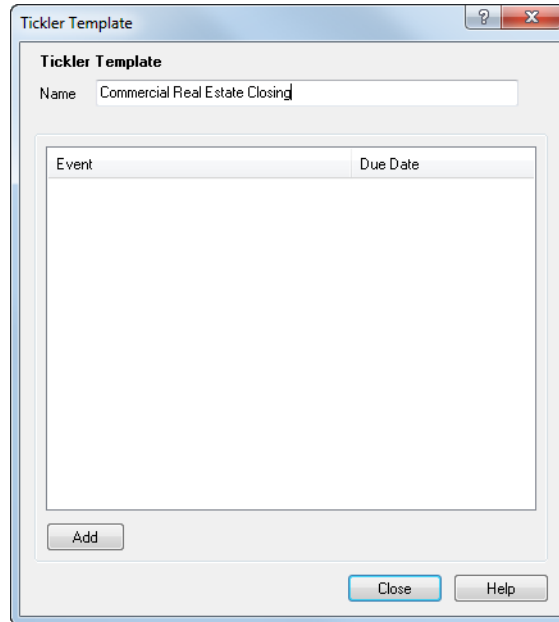
Linked events require a template to identify how the individual events relate to a base date. The actual base date is not part of the template and is only specified when the template is assigned to a matter. Refer to *“Opening the Tickler” on page 35*.

To illustrate, let’s create a Commercial real estate template using the fictitious dates and events in the following table.

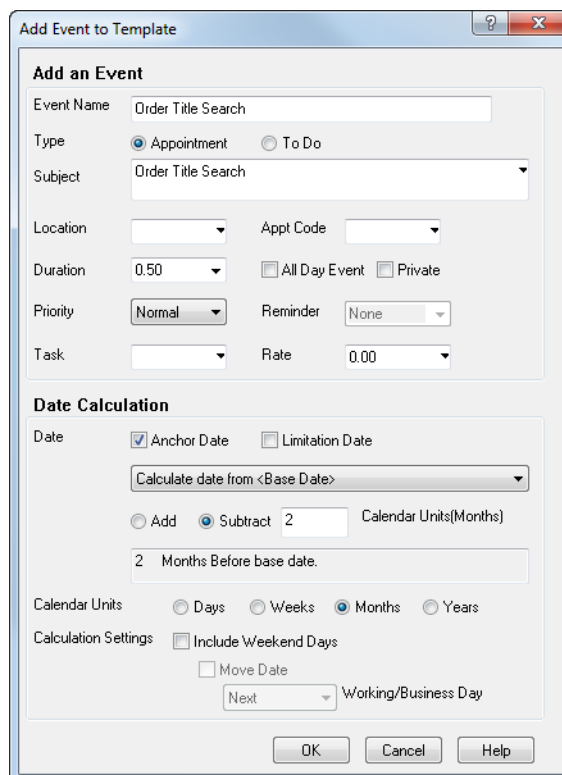
Date	Event
Base Date minus 2 months	Order title search
Base Date minus 6 weeks	Dispatch search letters
Base Date minus 1 month	Review Survey
Base Date minus 2 weeks	Confirm Insurance Binder
Base Date minus 1 week	Prepare draft mortgage
Base Date minus 1 day	Prepare closing documents
Base Date	Closing date

Linked Dates Templates window

1. Assign a name to the new template. For example, enter *Commercial Real Estate Closing*.



2. Click the **Add** button to open the Add Event to Template window.
3. Type the name for the first event in the **Event Name** field. In this example, use *Order Title Search*.



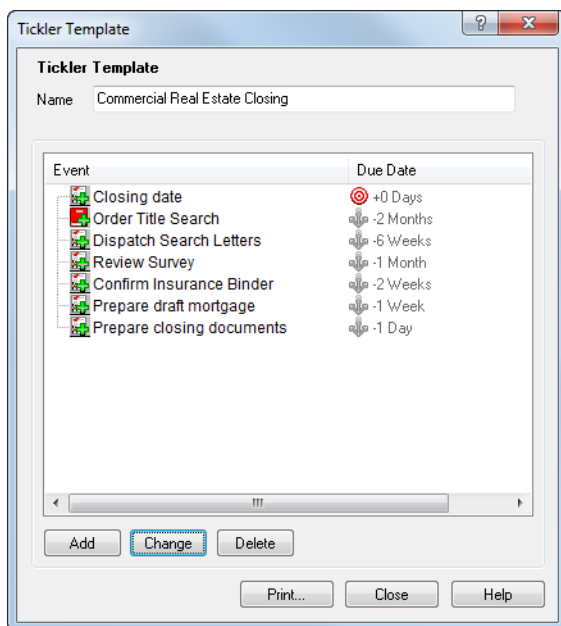
4. Select the **Type** of event. For this event, pick *To Do*.

5. Enter a detailed description of the event in the **Subject** field, if required.
6. Select the **Appt Code**. In this example, use *dep*.
7. Type the **Duration** in hours. For this event, enter 2.

Additional criteria related to the event's Location, Privacy, Priority, Reminder, Task, and Rate can be completed, as needed.

In this example, the event must occur two months prior to the base date.

8. Check **Anchor Date** to turn the to do into a fixed date event.
9. Select **Subtract** since this event occurs prior to the base date.
10. Type in the adjacent box, 2.
11. Select for **Calendar Units, Months**.
12. Click **OK** to add the event to the template.



When Anchor Date is selected for an event, an anchor icon appears in the Due Date column.

When Limitation Date is selected, a red bulls-eye appears in the Due Date column.

If neither option is selected, no icon displays in the column.

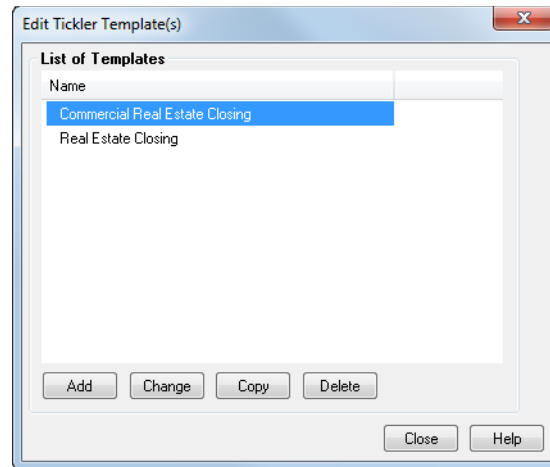
After all the events have been added for the template, click the Close button to return to the Create a Tickler Template window. The new template is now listed in the Template drop-down list.

Modifications to the new template, including changes to the individual events, can be made by selecting the Change button.

Managing Tickler Templates

File > Tickler > Edit

From the Edit Tickler Template(s) window, any saved template may be modified. Click a template in the list to select it, and then choose an action button.



Tickler Template window

Add

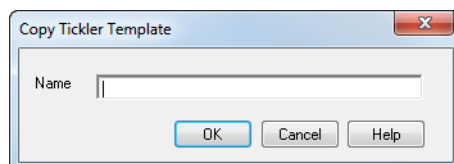
- Click to open the Tickler Template window to add a new template.
- Refer to *“Creating a New Template” on page 37* for more details.

Change

- Click to open the Tickler Template window to modify the selected template.
- Refer to *“Editing Tickler Templates” on page 41* for more details.

Copy

- Click to open the Copy Tickler Template window to duplicate the selected template.
- Enter a name for the new template.



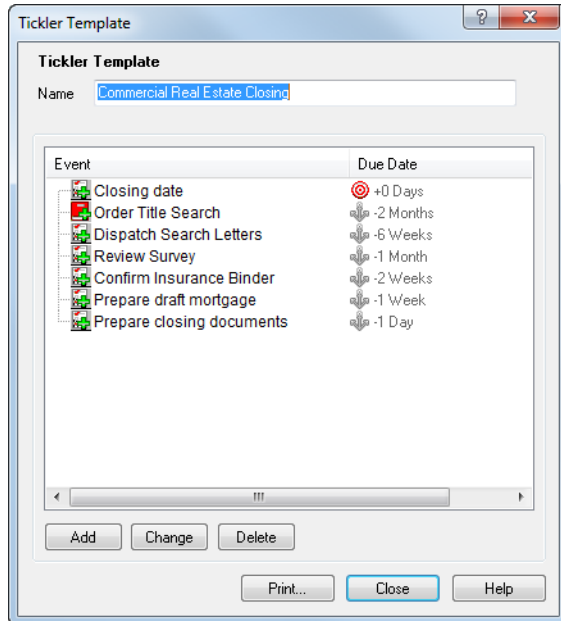
Copy Linked Dates Template window

Delete

- Delete the selected template.
- PCLaw displays a confirmation prompt prior to deletion.

Editing Tickler Templates

Use the action buttons on the Tickler Template window to add, change, or delete events from the template. Print out a list of events included on the template.



Linked Items window

Name

- Edit the existing template name, if required.

Add

- Click to open the Add Event to Template window to create a new event.

Change Item

- Click to open the Change Event of a Template window to make modifications to the selected event.

Delete

- Click to remove the selected event.
- PCLaw displays a confirmation prompt prior to deletion.

Print

- Click to Print a Tickler Template Listing.

Close

- Return to the Edit Tickler Template(s) window.
- The created template appears under the Name column.

Adding a Tickler to a Matter

When the required Tickler template has been created in PCLaw, adding a Tickler template to a matter is a simple, three-step process that can be performed from the File menu or by selecting the Tickler icon in the New Appointment or New To Do window.

Create a Tickler - Step 1 of 3

Select Template

Matter: 05-1236.011 Lawyer(s): VCM

Base Date: 3/26/2012 Start Time: 9:00a

Duration: 1:00

Template: Commercial Real Estate Closing Edit

Event	Due Date
Closing date	+0 Days
Order Title Search	-2 Months
Dispatch Search Letters	-6 Weeks
Review Survey	-1 Month
Confirm Insurance Binder	-2 Weeks
Prepare draft mortgage	-1 Week
Prepare closing documents	-1 Day

Matter: 05-1236.011 Client: 011 Name: Able, Bar...
 Re Line: Able v. State of Florida

Add Template OK Cancel Help

Create a Tickler - Step 1 of 3

1. Select the appropriate matter from the **Matter** field.
2. Click the **Lawyers** button to select one or more timekeepers.
3. Select the **Base Date**.
4. *If preferred*: Select a default start time.
5. *If preferred*: Select a default duration.
6. Select the Tickler template from the **Template** drop-down list.
7. Click **OK** to advance to the next step in the wizard.

The screenshot shows a dialog box titled "Create a Tickler - Step 2 of 3". It has a "Review Selected Template Details" section with the following fields:

Matter	05-1236.011	Lawyer	VCM
Base Date	3/26/2012	Start Time	9:00a
		Duration	1.00
Template	Commercial Real Estate Closing		

Below this is a table of events:

Event	Due Date
Order Title Search	Thu Jan/26/2012
Dispatch Search Letters	Fri Feb/10/2012
Review Survey	Sun Feb/26/2012
Confirm Insurance Binder	Mon Mar/12/2012
Draft mortgage	Mon Mar/19/2012
Closing documents	Fri Mar/23/2012
Closing date	Mon Mar/26/2012

At the bottom, there are buttons for "Add", "Change", and "Delete". Below the table, the matter information is displayed: "Matter: 05-1236.011 Client: 011 Name: Able, Bar..." and "Re Line: Able v. State of Florida". At the very bottom are buttons for "< Go Back", "Create Tickler", "Cancel", and "Help".

8. Review the Tickler events and corresponding dates.
9. Click **Create Tickler** to advance to the last step in the wizard.

The screenshot shows a dialog box titled "Create a Tickler - Step 3 of 3". It has a "Tickler Created Successfully" section with the following table:

Event	Due Date
Order Title Search	Thu Jan/26/2012
Dispatch Search Letters	Fri Feb/10/2012
Review Survey	Sun Feb/26/2012
Confirm Insurance Binder	Mon Mar/12/2012
Draft mortgage	Mon Mar/19/2012
Closing documents	Fri Mar/23/2012
Closing date	Mon Mar/26/2012

At the bottom, the matter information is displayed: "Matter: 05-1236.011 Client: 011 Name: Able, Bar..." and "Re Line: Able v. State of Florida". At the very bottom are buttons for "Print...", "Close", and "Help".

10. **Print** the Tickler, if required.
11. Click **Close** to exit the Tickler wizard.

Behind the Scenes

A series of linked events is created. Once appointments are recorded, print or display the Appointment Schedule or the Appointment Listing from the Reports menu.

A new record is created in the Appointment Entry data file for each linked item. Each item stands as its own appointment or to do, as well as being linked to the other events on the Tickler.

Continuances

When an appointment or to do cannot be completed in its allotted time, or follow up events are required, the client can make a continuance. A continuance creates a new, separate event using the same information as the original event. It also links the original and new events so you can view a history of the related records.

Click Continuance on an existing appointment to display the Continuance window. Complete the necessary information as required.

Continuance Window

The new event appears on the Calendar. If the event is an appointment, the new appointment appears on the appointment section of the Calendar in its allotted time slot or day. If the event is a to do, the new to do appears on the To Do Listing. The original event remains, however, the reason for the continuance is added to the event's description.

Behind the Scenes:

A continuance creates a new record in the Appointment Entry data file. The original record remains active, however the description field is appended to reflect the continuance. The two records are linked.

Matter Manager > Events Tab

File > Matter Manager

The Events tab displays appointments and to dos that are associated with the active matter:

Done	Posted	Due Date	Type	Lwyf(s)	Appt Code	Location	Reminder	Start Time	Duration	Action/Description
<input type="checkbox"/>	<input type="checkbox"/>	9/11/2012	Appointme RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	9/18/2012	Appointme RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	9/19/2012	Appointme ; RSB					12:00p	0:30	Meeting
<input type="checkbox"/>	<input type="checkbox"/>	9/21/2012	Appointme RSB		atc	ch		1:30p	0:30	At court
<input type="checkbox"/>	<input type="checkbox"/>	9/25/2012	Appointme RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	10/2/2012	Appointme RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	10/9/2012	Appointme RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	10/16/2012	Appointme ; RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	10/23/2012	Appointme ; RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	10/30/2012	Appointme ; RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	11/6/2012	Appointme RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	11/13/2012	Appointme VCM; RSE					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	11/20/2012	Appointme ; RSB					1:30p	0:30	Weekly update
<input type="checkbox"/>	<input type="checkbox"/>	11/27/2012	Appointme ; RSB					1:30p	0:30	Weekly update

Events tab in Matter Manager

The listing displays appointments and to dos associated with the current matter. Events are differentiated under the Type column. The feature buttons allow you to add or modify events.

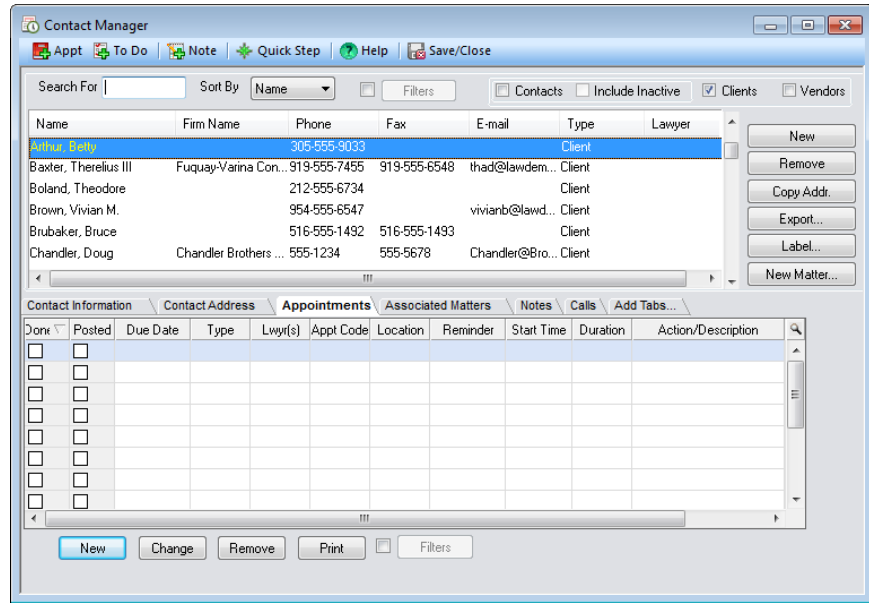
Appointments and to dos are entered through the Calendar, Matter Manager, Contact Manager, and Appointment Sheet. To access the Events tab, you must be assigned rights to the Appointment Listing.

Contact Manager > Appointments Tab

File > Contact Manager

Events associated with a contact can be viewed or modified on the Appointments tab of the Contact Manager.

The listing displays appointments and to dos associated with the current contact. Events are differentiated under the Type column. The feature buttons allow you to add or modify events.



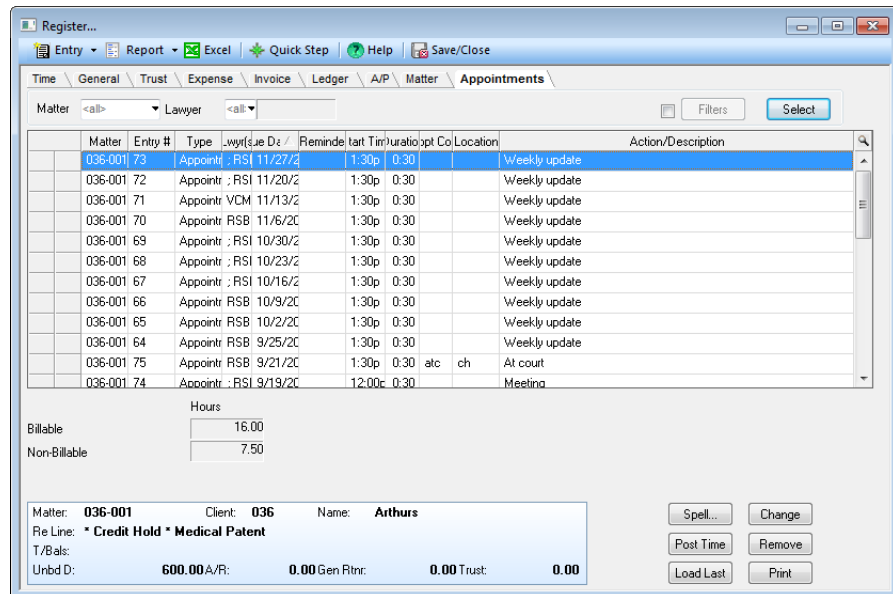
Appointments tab as it appears in Contact Manager

Appointments and to dos are entered through the Calendar, Matter Manager, Contact Manager, and Appointment Sheet. To access the Events Tab, you must be assigned rights to the Appointment Listing.

Register > Appointments Tab

Data Entry > Register

Any event can be changed or removed on the Appointments tab of the Register.



Appointments tab in the Register

Purging Calendar Entries

Tools > Purge Calendar Entries

This feature allows users to purge appointments, to dos, notes, and phone calls. By default, a list of purged entries is printed.

Because to dos are not required to have a date, these items will be purged if the date range is set to include 1/1/82. To purge all to dos with no date set, run the purge from 1/1/82 to 12/31/2199.

Purge Calendar Entries window

Calendar Reporting

Calendar events may be presented in two reports. One report is the Appointment Listing which provides a detailed description of the selected criteria; the second report is the Appointment Schedule which provides a more visual view of events.

Appointment Listing

The Appointment Listing displays calendar and note information in a report format. The report shows what is due for a specified reminder date or due date and may include one or more appointments, to dos, or notes. The user has a choice of viewing uncompleted, completed events, or both.



Warning: There are no safeguards to prevent entries from being purged. Any item that meets the selected parameters can be purged.

Appointment Schedule

The Appointment Schedule displays appointment and to do information in a Calendar format. The schedule may be displayed in a daily, weekly, or monthly view beginning at the start date of the program. Events are displayed for a specified reminder date or due date.

Document Manager

Document Manager is a multi-purpose utility timekeepers use to work with documents, e-mails, precedent templates, and saved research. The module stores documents, e-mails, and research related to matters, and organizes precedents for easy use.

Documents can be any electronic image stored on either the Firm's server or network directory structure. It may be a saved document from a word processor, a scanned image, a graphic, or any other computer file.

E-mail is a component of the Document Manager feature, and works in conjunction with Microsoft Outlook only. PCLaw does not currently link with any other e-mail applications, including Microsoft Outlook Express. It is possible to save e-mail from other e-mail applications if the e-mail is first saved as a unique file.

Precedents represent a standard library of document templates that can be easily recalled, modified, and customized for use with a specific matter. A precedent can be created from any document and saved to the precedent library. PCLaw data fields are then inserted into the precedent document creating a template. When the precedent is opened and a matter or contact is selected, the PCLaw fields automatically fill with information for those persons. The new document is then saved to the matter. The precedent template is preserved in its original format and can be used repeatedly.

Selecting Items to View

File > Document Manager

In Document Manager, click the Select button to view all documents, e-mails, precedents, or research items according to the selected tab. To refine your search, fill in one or more of the search criteria located above the grid area of the window. For documents, e-mail, and precedents, select Filters to further narrow your search, using the Advanced Selections window.

Selecting Documents, E-mail, and Precedents

On the Documents, E-mail, and Precedents tabs, you can view its respective contents or you can limit your search.

Notes



Terminology Note: The terms 'document', 'e-mail', and 'precedents' refer specifically to documents, e-mails, and precedents, respectively. 'Material' and 'Items' are used as generic terms to refer to all documents, e-mails, and precedents.

What You Should Know:

Document Contains

- View only material containing a specific word or string within the body of the item by typing the characters.

Matter

- View documents or e-mail saved to a specific matter.
- Precedents are not saved to matters.

Name

- View only material containing a certain word or string within the title of the item by typing the characters.

Desc or Comments Contain

- View only material containing a certain word or string in the Description or Comments areas of Document Properties by typing the characters.

Doc ID

- Search for a specific item by typing the document number.
- Document numbers are displayed in the Doc# box of Document Properties.

Advanced Selections

Material displayed on the Documents, E-mail, and Precedents tabs can be further restricted by using the filter option. To open the Advanced Selection window, check the box to the left of the Filters button, and then click the Filters button to display the Advanced Selections window.

Advanced Selections window

What You Should Know:

Created Date

- Refers to the date the material was added to PCLaw, and not the date the material is created as an electronic file.

Modified Date

- Refers to the last modified date for the document itself.
- This date is copied into the Document Properties window when adding the document.

Author

- Displays only material added to PCLaw by a particular user, after a user is selected.

Using Feature Buttons

File > Document Manager

Not all feature buttons are available for all tabs.

What You Should Know:

Open Doc

- The respective document, e-mail, or precedent opens using the application in which it was originally saved to PCLaw.

E-mail

- Attach the highlighted item to an outgoing e-mail.
- Attach multiple items to an e-mail by checking each item in the Select column.
- The e-mail message window opens with the item(s) inserted as an attachment.

Add Doc

- Add a new document or independently saved e-mail file to Document Manager.
- An Open window appears overtop of an Add PCLaw Document window.
- Select or browse to the document or e-mail file you wish to add to PCLaw.
- After clicking OK, you are taken to the Add PCLaw Document window.

Remove

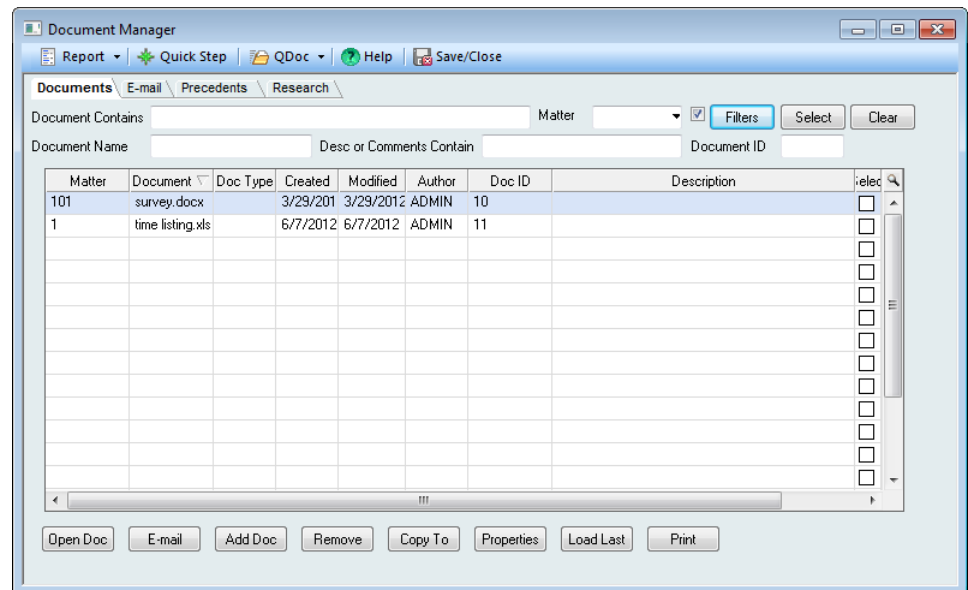
- PCLaw displays a confirmation prompt prior to final deletion.
- By removing the document, you not only remove its association with the matter in PCLaw, but the specific document is removed from its PCLaw directory on the hard drive.

Documents Tab of Document Manager

File > Document Manager > Documents Tab

Use this tab to search for and manage documents. Documents appear on this tab when they are saved to matters either through Document Manager, Matter Manager, Contact Manager, Add Document, Microsoft Word, WordPerfect, or Windows Explorer.

E-mail, precedents, and contents of the Legacy folder can also be displayed on this tab by selecting the appropriate filter options. Research items cannot be displayed on this tab.



Document Manager > Documents tab

E-mail Tab of Document Manager

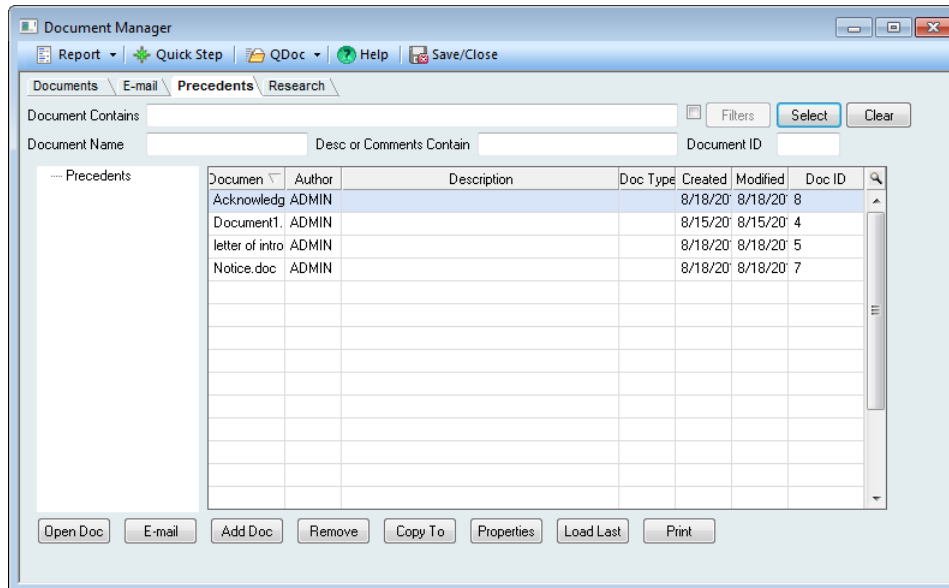
E-mail is saved to PCLaw either through the PCLaw icon in Microsoft Outlook, when sending an e-mail, or by adding an e-mail that was saved as a separate file. *Enable Connection for E-mail Tracking* must be enabled on the *Workstation Settings > Outlook Tab* to record e-mails from Microsoft Outlook.

Documents, precedents, and contents of the legacy folder can also be displayed on this tab by selecting the appropriate filter options. Research items cannot be displayed on this tab.

Precedents Tab of Document Manager

This tab displays all precedents saved to PCLaw as added through Microsoft Word. WordPerfect documents cannot be saved as precedents.

The grid can display all precedents, restrict precedents through filter options (refer to “Selecting Items to View” on page 49), or by using the folder pane.



Document Manager displaying the Precedents tab

To use the folder pane, Save Documents to Subfolders Based on Document Type must be selected on the *System Settings > Front Office Tab*.

- Click the '+' sign to the left of Precedents to reveal its subfolders.
- Highlight the parent Precedents folder to display all precedents.
- Highlight a particular subfolder to display only the contents of that folder.

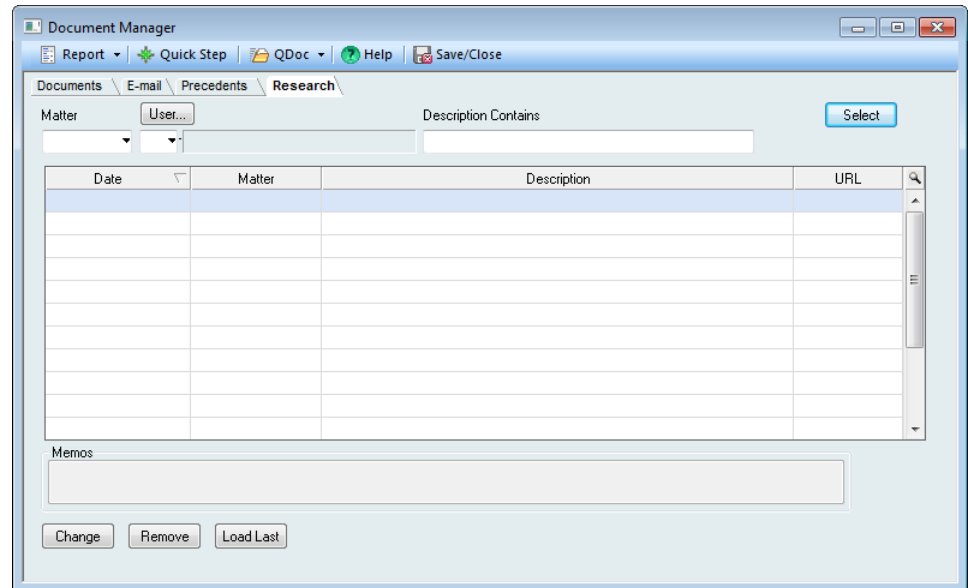
Subfolders contain precedents according to their document types.



Note: Subfolders are not created until a precedent using that document type is saved. If no subfolders appear, the Document Type box is empty of all precedents.

Research Tab of Document Manager

This tab displays all research saved to PCLaw as added through the Lexis Research feature. The Lexis Research window can be accessed by selecting LexisNexis Research on the *File > Document* pull-down menu, or by clicking the Add or Change button on this tab.



Document Manager displaying the Research tab

Applying Document Manager Security

Options > Administrator > Security

In order to view information for individual tabs and other functions, the user not only needs to be assigned rights to Document Manager, but also to selected PCLaw features. For Document Manager, access to the following reports and features are required:

Tabs and Buttons	Corresponding Report
Document Tab	Reports > Document Listing
E-mail Tab	Reports > Document Listing
Precedent Tab	Reports > Document Listing
Add Doc button	File > Document > New Document
Add button	File > Document > LexisNexis Research
Properties button	File > Document > Open Document

Creating and Opening Documents

PCLaw provides the capacity to manage documents, e-mails, and precedent templates. Much of the management of this resource is performed using Document Manager. However, the creation and upkeep of documents extends beyond Document Manager.

The New Document window provides a quick and easy method to adding documents within PCLaw without opening the Document Manager, Matter Manager, or Contact Manager. Open Document provides the same ease to view the properties of documents previously added to Document Manager.

New Document

File > Document > New Document

New Document adds a document to Document Manager without opening the module.

1. Select on the **File** pull-down menu, **Document > New Document** to display an Open window overtop an Add PCLaw Document window.
2. Select or browse to the document you wish to add to Document Manager.
3. Click **OK** to proceed to the Add PCLaw Document window.
4. Complete this window as required.
5. Click **OK** to save the document and close the Add PCLaw Document window.

-Or-

Click **New** to add another document to Document Manager.

Open Document

File > Document > Open Document

View and modify the properties of existing documents without opening Document Manager.

1. Select on the **File** pull-down menu, **Document > Open Document** to display an Open window.
2. Select or browse to the document you wish to open.
3. Click **OK** to display the Change PCLaw™ Document window.
4. Make any changes, as required.
5. Click **OK** to save your modifications.

Adding Documents

For all methods of adding documents to PCLaw, you are prompted with an Add PCLaw Document window. Use this window to complete information on the document.

Add PCLaw Document window

Documents can be added through:

- File > Document > Open Document
- Document Manager
- Microsoft Word
- Corel WordPerfect
- Windows Explorer

What You Should Know:

Matter

- If you are adding the document through PCLaw or Windows Explorer, type the matter nickname.
- For Microsoft Word and Corel WordPerfect, the matter is selected prior to saving the document.

Contact(s)

- The Contact button is not available for Microsoft Word and WordPerfect.
- For Microsoft Word, the contact is selected prior to saving the document.
- For WordPerfect, contacts are not accessible using the PCLaw Document toolbar and therefore cannot be saved through the application.

Author

- The author box defaults to the user name entered when logging into the Document Link Manager.

Creation Date

- PCLaw adds the date the document is associated to the matter.
- The date can be changed at the time the document is created or later by using the Properties button of Document Manager.
- The creation time cannot be changed.

Source

- Displays a temporary path utilized by Microsoft Word.
- The document is temporarily saved in the shown directory, prior to PCLaw saving the document into the prescribed document folder.

Use Same Information for all Documents

- For Adding documents with Windows tool bar only.
- When adding multiple documents, assign the same properties to all documents by checking this box.

Behind the Scenes:

Document Manager has a very extensive directory structure, but one that is not very difficult to understand.

The data directory begins with the PCLawDocs folder. By default, the PCLawDocs folder is created as a Data sub-folder on the same level as the Statdata and Dyndata folders. This is done to keep the PCLaw Data directory structure in tact during the installation process. Best Practices recommend that the PCLawDocs folder be maintained outside the data folder. Most firms have a dedicated location for storing their electronic documentation, often a separate server, partition, or drive.

Within the PCLawDocs directory are as many as five sub-folders.

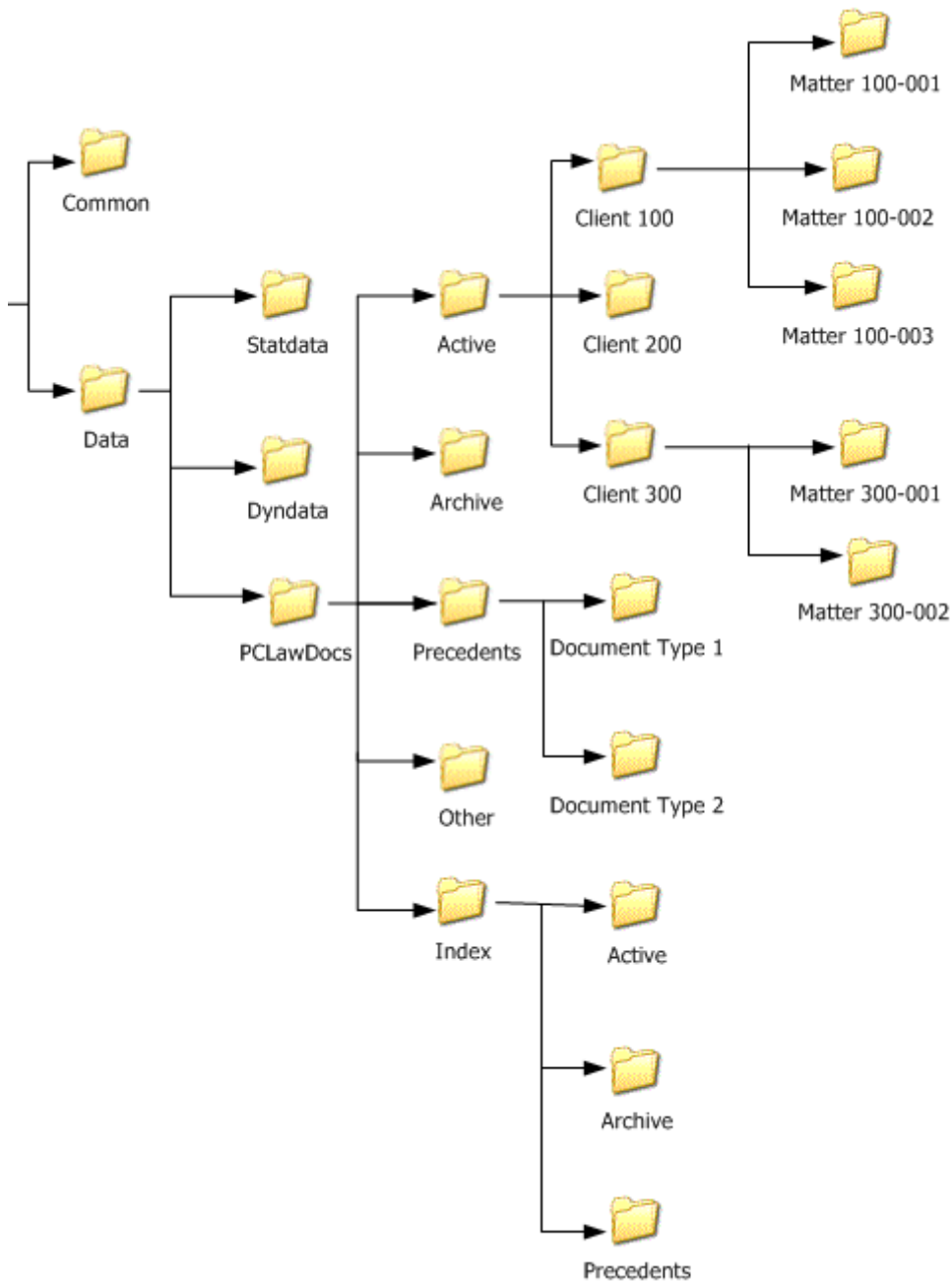
Active

Active refers to the matter status. This folder stores the electronic media for all active matters. Within this folder is a sub-folder for each client to whom documentation has been added through one of the Add Document processes. A folder is not created when the client is created, but when the first document is associated to a matter belonging to that client.

Within each Client folder are matter sub-folders representing each matter for that client, to which documents are stored.

If *Save Documents to Subfolders Based on Document Type* is enabled on the Front Office Tab of System Settings, there may be a third sub-directory structure based on the document types listed on the *Options > Lists > Document Types* pop up help window.

Document type folders are positioned within the matter folders.



Document Manager Directory Structure

Archive

When a matter is archived, its document sub-folder is moved to the Archive folder. A parent client folder is created to hold the matter folder, even if the client remains active. The matter folder is renamed as 'a-' and is appended to the front of the current name to indicate the matter is not active.

Documents cannot be saved directly to the Archive folder.

Precedents

This folder stores all precedents. Since precedents are not a saved directory to a matter, the files may be saved directly into this folder, or if *Save Documents to Subfolders Based on Document Type* is enabled on the Front Office Tab of System Settings, there may be a sub-directory structure based on the document types listed on the *Options > Lists > Document Types* pop up help window.

Index

This folder contains all the index records for each document folder and sub-folder, using a directory structure that replicates the structure of the other folders.

Other

This folder has not currently been assigned a role.

Documents in Matter Manager

The Docs and E-mail Tabs in Matter Manager display documents and e-mails associated with the selected matter. The Matter Manager grid works similarly to the grid in Document Manager.

Docs Tab

The Docs Tab displays documents that are associated with the matter. Use the Docs Tab to:

- View documents associated with the matter.
- E-mail a document.
- Create a new document.
- Copy a document to another location.
- View the properties of a document.
- Add an existing document.

To access the Docs Tab, the user must be assigned rights to the Document Listing in addition to the required rights to access Matter Manager.

E-mail Tab

The E-mail Tab lists e-mail that are associated with the matter. Use the E-mail Tab to:

- View, change, or remove e-mail for the active matter.
- Associate an e-mail with the matter.
- Copy an e-mail to another location.
- View the properties of an e-mail.

To access the E-mail tab, the user must be assigned rights to the Document Listing in addition to the required rights to access Matter Manager.

Documents in Contact Manager

The Document and E-mail tabs in Contact Manager display documents and e-mails associated with the selected contact. The Contact Manager grid works similarly to the grid in Document Manager.

Although the Document and E-mail tabs of Contact Manager display items associated with contacts, those items still must be associated with a matter.

Associating a document or e-mail to a matter that is also linked to a contact does not directly associate the document to the contact. The contact must be selected in the Document Properties window.

Documents Tab

The Documents Tab displays documents that are associated with the contact. Use the Documents Tab to:

- View documents associated with the selected contact.
- E-mail a document.
- Create a new document.
- Copy a document to another location.
- View the properties of a document.
- Add an existing document.

To access the Documents Tab, the user must be assigned rights to the Document Listing in addition to the required rights to access Contact Manager.

E-mail Tab

The E-mail Tab lists e-mail that are associated with the contact. Use the E-mail Tab to:

- View, change, or remove e-mails for the selected contact.
- Copy an e-mail to another location.
- View the properties of an e-mail.

To access the E-mail Tab, the user must be assigned rights to the Document Listing report, in addition to the required rights to access Contact Manager.

Document Reporting

The Document Listing is the prime report for printing document information. However, other reports in PCLaw offer selective information on PCLaw documents.

Document Listing

The Document Listing provides document, e-mail, and precedent information for a matter, client, lawyer, or firm. This report can also be produced by author or document type, creation or modified date, or by a key word or phrase within the title, body, or description of the document. Contact information can be included or excluded. The report can be sorted by a number of criteria, including document name, author, or type.

Document Types

This report, run from Document Types window, lists the nicknames and descriptions of document types.

Matter Status Report

Information on this report includes the last document added to the particular matter, when it was added, and the author who added it.

Select

- Click to produce a list of phone events based on the criteria you selected.

Refresh

- Click to refresh the list to include any new phone events that occurred since Phone Call Manager was opened.

Completed

- Click to mark the highlighted phone event as completed.

Print

- Click to produce a List of Phone Calls report.

Adding a New Phone Call

Data Entry > Phone Calls

Use the New Phone Call window to create and track phone calls made or received by the user, both outgoing and incoming, and attach to appropriate matter, if applicable.

These entries are similar to time entries, and may be posted to the Client Ledger by selecting *Do a Time Entry*. Users may also have these phone calls appear within the Calendar as a To Do.

New Phone Call window

What You Should Know:

Phone

- Type the phone number of the other party.
- If a contact already in PCLaw is selected, a list of available phone numbers for that contact is displayed.

Completed

- Check if all required action regarding this phone call is completed.

Do Time Entry

- Click to convert the phone call into a time entry.
- The user is taken to an Additional Time Entry Information window where you are asked to confirm the working lawyer, task code, and billing rate.

Create To Do

- Click to convert the phone call into a To Do using the New To Do window.

Adding a New Phone Message

Data Entry > New Message or File > Phone Call Manager > New Message

Use this feature to take phone messages from clients and have them tracked within PCLaw. These messages may be electronically sent to various users of PCLaw, and will display on their computer.

New Phone Message window

What You Should Know:

Taken for

- Click the *User* button to select from List of Users, the user for whom this message is intended, or type the user nickname in the adjacent box.

Completed

- Check if all required action regarding this phone message is completed.

Action

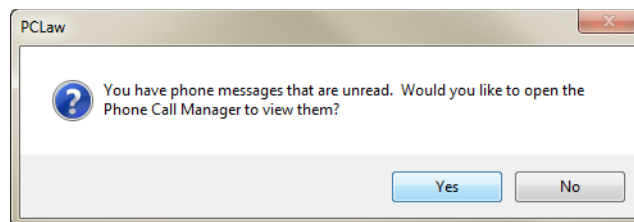
- Check the appropriate box to indicate the appropriate response to this message.

Receiving Phone Messages

Once a message is sent to a user via the new message feature, it appears on the user's workstation.

If the User Is Not Logged Into PCLaw

If a user is not logged into PCLaw, he/she will receive the message upon login. The user receives a message regarding unread messages in Phone Call Manager and has the option of viewing those messages immediately.

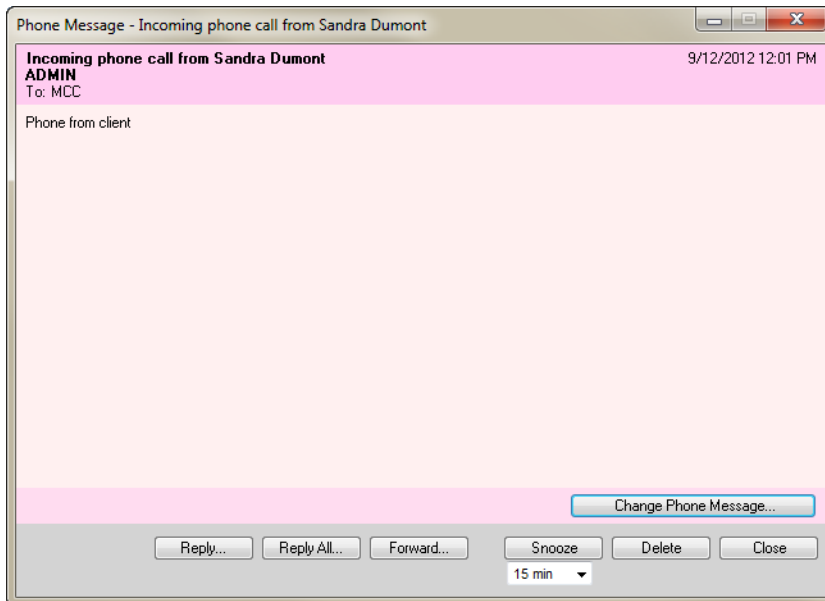


PCLaw Confirmation Prompt

- Select **Yes** to view the messages immediately in Phone Call Manager.
- Select **No** to return to the Quick Step Menu.

If the User Is Logged Into PCLaw

If a user is logged into PCLaw, the following PCLaw message window appears:



PCLaw Message Window

Select Details to access the Change Phone Call window. From this window, messages may be converted into To Dos or Time Entries.

Phone Call Manager Security

The Phone Call Manager contains tabs and function buttons, whose access can be denied, if rights are restricted to the user's group. Items not listed do not require individual security settings.

To use Phone Call Manager, security must be enabled in PCLaw. The Phone Call Manager utilizes the list of users from the Security Setup window. Message notification can only be sent to existing users in PCLaw.

Window and Buttons	Corresponding Report
Phone Call Manager	Reports > Appointment Listing
New Call	Data Entry > New Phone Call
New Message	Data Entry > New Message
Change Button <i>(for phone calls only)</i>	Data Entry > New Phone Call

Message Manager

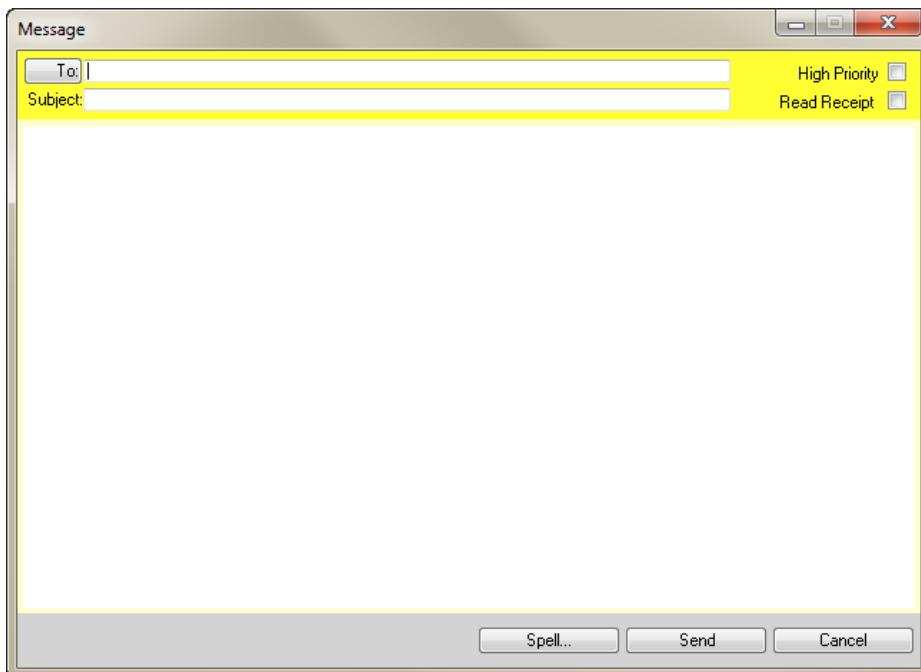
Message Manager empowers you to send sticky note messages to other PCLaw users. Send messages through Message Manager itself, or through User Message on the Tools pull-down menu. Messages can be marked as high priority, and a read receipt can be required. Quick Tabs in Message Manager groups messages by several criteria, as determined by you and access can be restricted to assigned users. Create Quick Tabs for each recipient, subject, or message type, or view messages by relevant dates.

Quick Tabs created in Message Manager are not transferable to other PCLaw features.

Sending Messages

Tools > User Message

PCLaw must be open to send a message. Messages can be sent by clicking User Message on the Tools pull-down menu, clicking the Message icon in Message Manager, or by clicking the Reply or Forward icons on a received message. The recipient will see the message immediately if PCLaw is open. If PCLaw is not open, the recipient receives the message upon opening PCLaw.



Message window for sending messages in PCLaw

What You Should Know:**To**

- Click to select the user from the List of Users window, or type the user name in the adjacent box.

High Priority

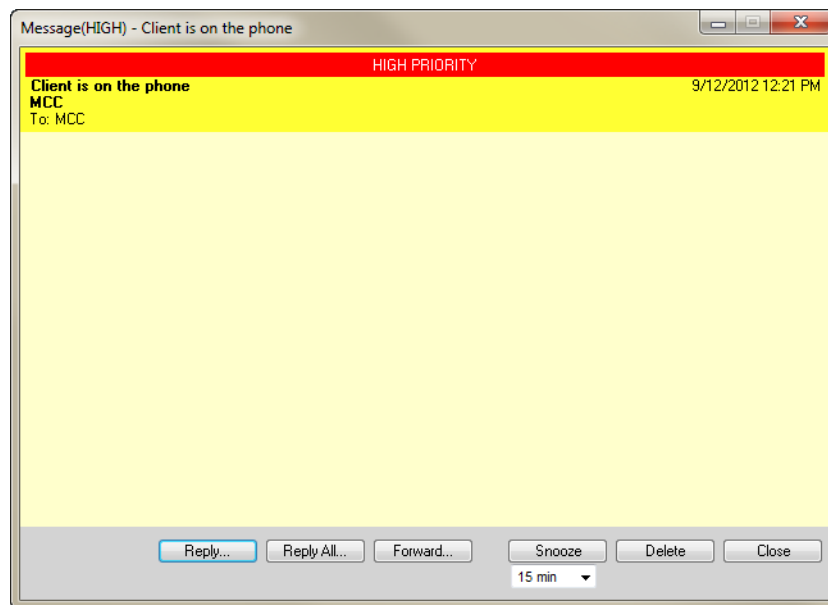
- Check to prioritize the message.
- A red banner displays on the recipient's message.

Read Receipt

- Check to receive a read receipt.
- The receipt is sent when the recipient closes the message.

Receiving Messages

PCLaw must be open to receive an message instantaneously. If PCLaw is not open, messages pop up upon launching the application. High priority messages are marked with (HIGH) on the toolbar, and a red banner across the top of the message.



High Priority Message window

What You Should Know:**Reply**

- Click to open a new message window addressed to the message sender.
- The original message chain is displayed at the bottom of the text pane.

Reply All

- Click to open a new message window addressed to the message sender and all recipients of the message.
- The original message chain is displayed at the bottom of the text pane.

Forward

- Click to open a new message window with the recipient not filled in.
- The original message chain is displayed at the bottom of the text pane.

Snooze

- Click to be prompted with the message at a future interval.
- Select the time interval from the drop-down menu immediately below the Snooze button.

Delete

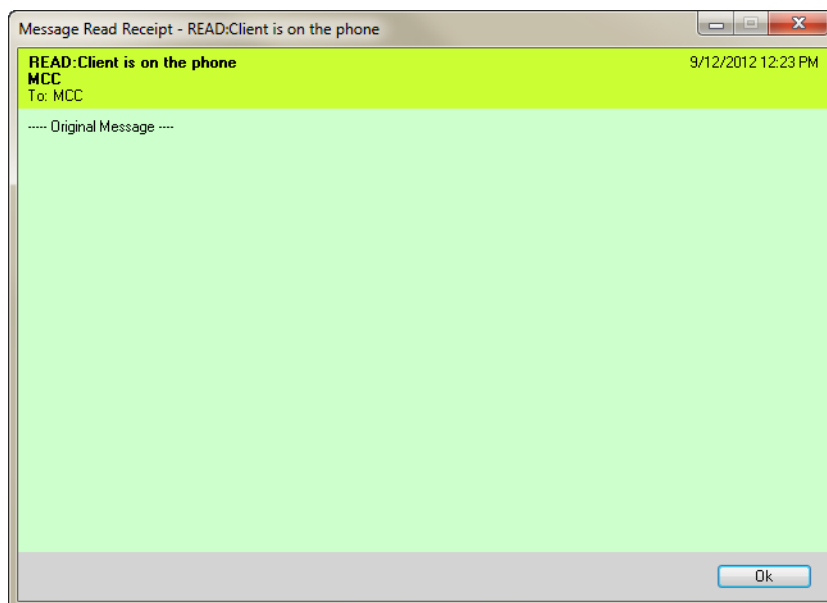
- Click to delete the message without saving it in Message Manager.

Close

- Click to close the message while preserving it in Message Manager.

Read Messages

When marking a message with a Read Receipt, the receipt is sent as soon as the user closes the message.

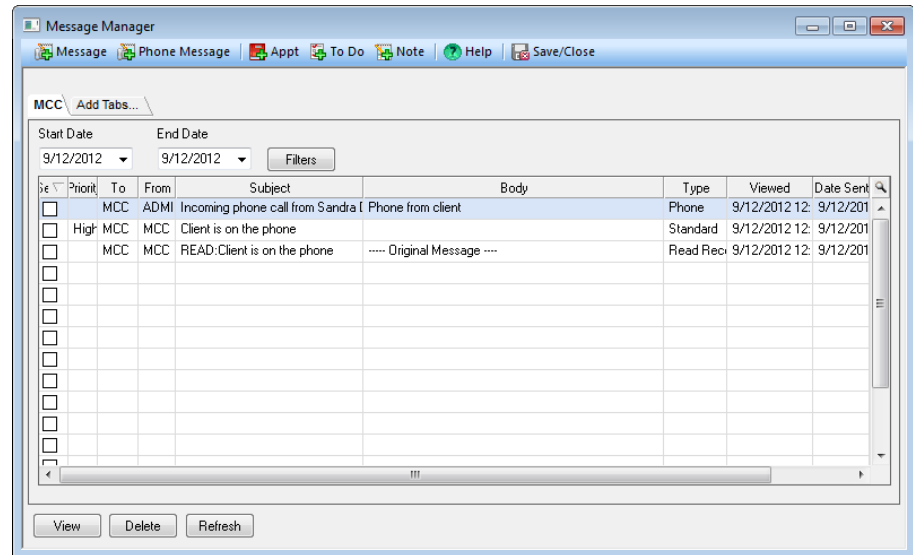


Message Read Receipt window

Navigating Message Manager

File > Message Manager

Use Message Manager to add messages, phone messages, appointments, To Dos, and notes. Existing messages can be grouped by Quick Tabs, sorted by column headings, viewed, or removed. Options for the Admin Tab differ from options available for Quick Tabs.



Message Manager Window

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 Dos, and Conflict searches. When selecting multiple matters, the icons for single matter functions are disabled.



Message Manager Toolbar

What You Should Know:

Tabs

- Click the user tabs to view messages associated to that user.
- Messages on tabs can be grouped by date, sender, subject, priority, or event type.

Add Tabs

- Click to add hidden Quick Tabs, or create new Quick Tabs.

Start Date

- *Admin Tab* - Select to show events posted on or after this date.
- *Quick Tabs* - The Start Date displays the date parameter selected on the Message Quick Tab Selections window.

End Date

- *Admin Tab* - Select to show events posted on or prior to this date.
- *Quick Tabs* - The End Date displays the date parameter selected on the Message Quick Tab Selections window.

Filters

- Click to filter contents of the Admin Tab using the Message Filters window.
- Admin Tab filters are not saved for the next Message Manager session.

Change Tab

- For Quick Tabs only.
- Click to change the settings of the selected Quick Tab using the Message Quick Tab Selections window.

Creating Quick Tabs in Message Manager

Creating Quick Tabs in Message Manager

Use Quick Tabs to personalized tabs in Message Manager, as well as tabs based on date, priority, sender, or message type.

Message Quick Tab Selections window

What You Should Know:**Publish to User**

- Select the PCLaw users who are allowed to view this tab.

From

- Click this option to create a tab for a particular sender using the List of Users window.

Subject Contains

- Type a keyword to restrict the tab to messages containing that keyword in their subject line.

Body Contains

- Type a keyword to restrict the tab to messages containing that keyword in the message text.

Normal/High

- Check this option to include Normal or High priority messages.

Include Types

- Select required message types to include those messages on this tab.

Safe Custody Manager

Notes

Safe Custody Manager enables the firm to track the physical property of clients. With Safe Custody Manager, you can monitor and maintain details concerning property in the possession or care of the firm, create a Safe Custody record, or identify the record type, such as a will or lease. Create your own custom packet, the physical receptacle containing the property, such as a storage container, folder, or file cabinet. Then add locations where the property can be stored.

Not only can you specify a date to review the record, but you can also attach a scanned image of a document or item. Safe Custody Manager eliminates the hassle of a manual file system or acts as a stand alone electronic file tracking system.

What Is Safe Custody?

The concept of Safe Custody Manager begins with a container, called a *packet* which is used to store any physical property or documentation. The container or packet can be as simple as a file folder in a filing cabinet or a lockable storage container or more formal, such as a safe or safety deposit box. A packet is any location or receptacle that is used to store, secure, or organize client property that is in possession of the law. firm. Packets in Safe Custody Manager are numbered in chronological order, starting with '1'.

Inside the packet are records or items. Both terms are interchangeable in Safe Custody Manager. These records or items are the actual client possessions. They can be a document, such as a lease, will, or contract, physical evidence, or depositions, such as an audio or video tape, photographs, or client valuables, such as jewelry or bonds. In essence, a record in Safe Custody Manager can be anything in the firm's possession.

Records are grouped into record types, which can be similar to the examples provided above, or whatever categories are most suitable to the firm. PCLaw does not provide pre-existing record types, as they must be added by the firm.

A record is assigned a status at all times, which indicates the record's positioning in regards to the packet. The record may be *In Packet*, meaning it can be currently found inside its packet. If it is *Uplifted*, the record is currently signed out, and is in the care of a *Recipient*. The record may also be designated to be returned to the client, not to be returned, or obsolete. In addition to these status's



Note: A number cannot be duplicated or reused.

provided by PCLaw, you can add your own and modify a status at any time.

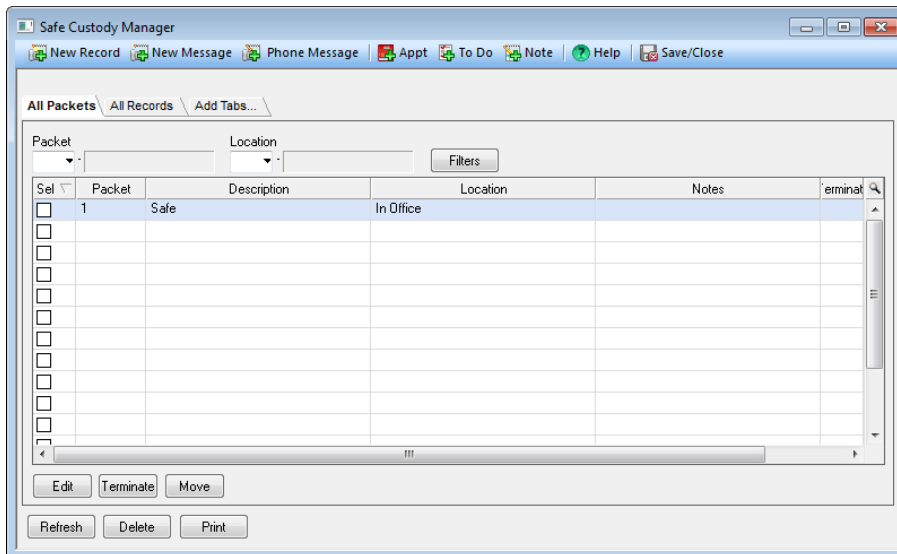
Another designation of a packet is its *stage*. A stage indicates where the record is in its life cycle. For instance, documentation may be assigned stages of preparation, client review, implementation, and completion. Stages are subsequently classified into *stage groups*. A stage group is a collection of stages for a record category. The aforementioned documentation life cycle would belong to a stage entitled *Documents*. There may be separate stage groups for different document types, such as contracts and wills, as well as for depositions, physical evidence, and other items that the firm deems appropriate to track using Safe Custody Manager. PCLaw does not provide pre-existing stages or stage groups, but both can be added to the application to best suit the needs of the firm.

Once a record is created, actions on the record can be tracked. This is termed as *movements* in Safe Custody Manager. A movement is considered any change in the status or stage of a record. Each movement is tracked separately, and can be listed on the Safe Custody Listing. Movements can require a hard copy of the action to be printed, with a place for an authorizing signature. Once a movement is posted to PCLaw, it cannot be modified, although a movement can be removed in its entirety.

Navigating Safe Custody Manager

File > Safe Custody Manager

PCLaw provides the Safe Custody Manager with two default tabs, listing packets, and records, respectively. Existing tabs can be filtered or additional Quick Tabs can be added. The Safe Custody Manager has its own customized tool bars and feature buttons. Additional feature buttons are available for each tab type, with packet tabs and record tabs accessing additional windows to assist in their functionality.



Safe Custody Manager

What You Should Know

Delete

- The packet or record must be marked as terminated prior to deleting the item from the Safe Custody Manager.
- PCLaw displays a confirmation prompt prior to deleting the item.

Print

- Click to produce a Safe Custody - Packets or Safe Custody - Record Items report for the active tab.

Safe Custody Manager Toolbar

Use the Safe Custody Manager toolbar to create new records or access other PCLaw Front Office windows. The icons on the toolbar remain unchanged regardless whether a packet or record tab is active.

All Packets Tab of Safe Custody Manager

Use the All Packets tab to work and view the complete list of packets. You can sort by location or by packet in the main Search area. Use the filters button to refine the list of packets. The tab displays at a glance, the packet number, description, and location, as well as any additional notes, and the termination date if one has been assigned. Individual columns on the grid can be hidden by right-clicking on the column heading and selecting Remove Column.

Move

- Click to move selected records in one or more packets using the Safe Custody Movement window.
- Refer to “Documenting Movements” on page 86 for more information.
- When selecting multiple packets, the records for all selected packets are listed in the Safe Custody Movement window.
- Moving records involves changing the Status only.
- Record Stages cannot be changed within a packet. It can only be changed within the record only, accessed through the Movement Tab of the Safe Custody Record window. Refer to “Creating Safe Custody Records” on page 83 for more information.
- Record movements are included on the Safe Custody Listing.

All Records Tab of Safe Custody Manager

Use the All Records Tab to work and view the complete list of records. You can sort by packet, item, date, or record type. The grid also lists notes, review and termination dates, status, and stage. Any column can be hidden by clicking the column heading and selecting Remove Column. Use the Filters button to refine the list of records.

The screenshot displays the 'All Records' tab interface. At the top, there are tabs for 'All Packets', 'All Records', and 'Add Tabs...'. Below the tabs, there are search filters for 'Packet', 'Matter' (set to 05-2897.026), 'Client', 'Start Date' (1/1/1982), and 'End Date' (12/31/2199), along with a 'Filters' button. The main area is a table with the following columns: 'Se.' (with a dropdown arrow), 'Packet', 'Item', 'Date', 'Type', 'Description', 'Notes', 'Review', 'Status', and 'Stage' (with a dropdown arrow). The table contains several empty rows. At the bottom of the window, there are three buttons: 'Add', 'Edit', and 'Terminate'.

All Records Tab of Safe Custody Manager

What You Should Know:

Filters

- Click to open the Record Filters window to further refine the list of packets.
- Refer to “Packet Filters” on page 80 for more information.

Add

- Opens the Safe Custody Record window to create new records.
- Refer to “Creating Safe Custody Records” on page 83 for more information.
- Regardless of how the All Records Tab is filtered, a new record can be created for a new packet or any existing packet.

Edit

- Opens the Safe Custody Record window displaying the details of the selected or highlighted record.
- Refer to “Creating Safe Custody Records” on page 83 for more information.
- The Safe Custody Records window for an existing record also contains a Movement Tab listing all movements for that record.

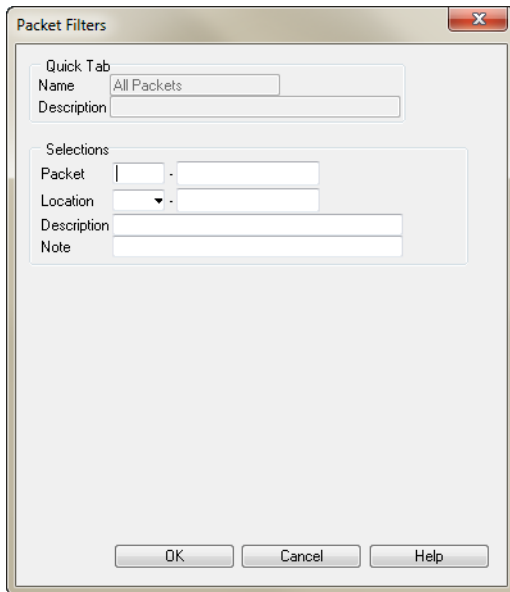
Terminate

- Click this option to change the status of the selected or highlighted record to Terminated.
- PCLaw displays a confirmation prompt prior to terminating the record.
- A record is assigned a termination date, but is not deleted from the packet.
- Permanently removing a record from the packet can occur only in the Safe Custody Record window.

Packet Filters**File > Safe Custody Manager >All Packets Tab**

Use the Packet Filters window as a way of refining the list of packets on All Packets Tab. Only the default tabs in Safe Custody Manager, All Packets and All Records can be filtered. For Quick Tabs, the Filter button is not available.

However, a Change Tab button becomes available. Click the button to modify settings on the Quick Tab. The Packet Filters window contains different filtering parameters to the Record Filters window, refer to “Record Filters” on page 81 for more information.



Packet Filters window

What You Should Know:

Quick Tab

- Displays *Name*, *Description*, and *User* information about the tab.
- Information is excluded from filtering parameters.

Description

- Type the text to list all packets where the description contains that text.
- The complete text does not need to be searched, only an unbroken text string.
- This is a text box only and does not access a drop-down menu or pop up help.

Note

- Type the text to list all packets where the note contains that text.
- The complete text does not need to be entered, only an unbroken text string.
- This is a text box only and does not access a drop-down menu or pop up help.

Record Filters

File > Safe Custody Manager >All Records Tab

Use the Record Filters window as a way of refining the list of records on All Records Tab. Only the default tabs in Safe Custody Manager, All Packets, and All Records can be filtered.

For Quick Tabs, the Filter button is not available. However, a Change Tab button becomes available. Click the button to modify

settings on the Quick Tab. The Record Filters window contains different filtering parameters to the Packet Filters window, refer to “Packet Filters” on page 80 for more information.

Record Filters window

What You Should Know:

Item Date

- Filter by the date the record was added to the packet.
- When adding a new record, the Item Date is simply labeled as Date in the Safe Custody Record window.
- Refer to “Creating Safe Custody Records” on page 83 for more information.

Review Date

- Filter by the date the record is assigned for review.
- The *Review Date* is assigned in the Safe Custody Record window.

Termination Date

- Filter by the date the record is designated for termination.
- The *Termination Date* is assigned in the Safe Custody window when the Terminated box is checked.

Matter

- Filter by one of the matters that has been added to the record.
- Multiple matters can be assigned to a record in the Safe Custody Record window, while a user can only filter by a single matter.

Client

- Filter by the client of one of the matters that has been added to the Safe Custody record.
- Assigning multiple matters to a record may or may not constitute multiple clients.

Packets

- Type the packet number (nickname) to list records belonging to a single packet.

Record Type

- Type the nickname to list records assigned a specific record type.

Record Status

- Select the status from the drop-down menu to list all records with that status.

Description

- Type the text to list all records where the description contains that text.
- The complete text does not need to be searched, only an unbroken text string.
- This is a text box only, and does not access a drop-down menu or pop up help.

Note

- Type the text to list all records where the note contains that text.
- The complete text does not need to be entered, only an unbroken text string.
- This is a text box only, and does not access a drop-down menu or pop up help.

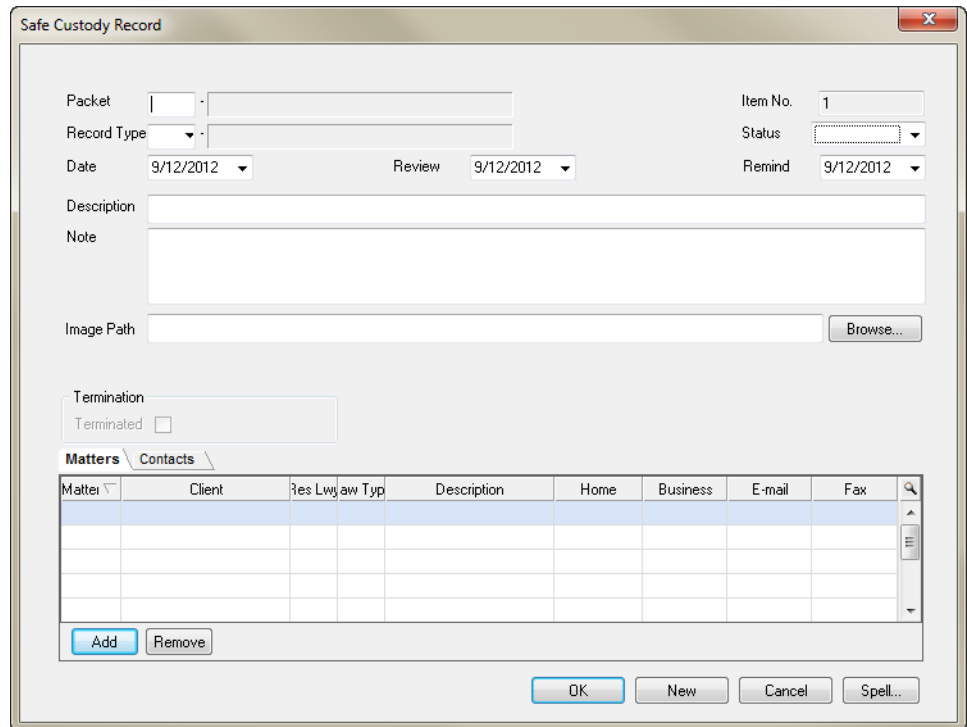
Creating Safe Custody Records

Use this window to create records for inclusion into packets, including description, scanned images, matter and contact association, and actions taken upon the record.

The Add - Safe Custody Packet window can be opened by clicking the Add button in the Pop Up Help - Packets window. The Safe Custody window can be opened in multiple ways throughout the Safe Custody Manager.

- Select Safe Custody Records from the Data Entry pull-down menu.
- Click the Add button in the Change - Safe Custody Packet window.
- Click the Add button on the All Records Tab in Safe

- Custody Manager.
- Click the New Record icon on the toolbar of Safe Custody Manager.



Safe Custody Record window

What You Should Know:

Packet

- Select the packet number for which this record belongs.
- When accessing this window from the Change - Safe Custody Packet window, the packet number fills in automatically.

Item No.

- This number is assigned to PCLaw and cannot be modified.
- The item number is unique for each packet.
- The number starts at 1 and increments by 1 for each packet.

Record Type

- Type or select the record category for this record.
- This box accesses the Pop Up Help - Records Type window.

Status

- Select the record status from the drop-down menu.
- The drop-down menu can be modified using the Pop Up Help for Record Status.

Image Path

- If a electronic or scanned image of the record is taken, include the directory path for the image.
- This option is to provide additional security for the record, and is not intended to be a substitute for Document Manager.
- If an electronic document is added to both Document Manager and Safe Custody Manager, PCLaw does not recognize the two links to be the same document.

Terminated

- Check if the item is to be terminated.
- A date field appears adjacent to the check box, if enabled.
- Select the actual termination date for the record.

Matters Tab

- This tab lists all matters associated with this record.
- When creating a new record, a matter or contact must be added as part of the record.
- Matter and client information, including responsible lawyer, type of law, contact information, and description is displayed.
- This tab contains the same properties of all grid tabs in PCLaw, and can be customized to display fewer columns.
- Click the *Add* tab to associate one or more matters with this record using the Select Matter window.
- Click the *Remove* button to remove the association between the record and the highlighted matter.
- Clicking the *Remove* button removes the association immediately without a confirmation prompt.

Contacts Tab

- This tab lists all contacts associated with this record.
- When creating a new record, a matter or contact must be added as part of the record.
- Contact Name and Firm Name is displayed, along with role and contact information.
- This tab contains the same properties of all grid tabs in PCLaw, and can be customized to display fewer columns.
- Click the *Add* button open the Contacts Selection to associate one or more contacts with this record.
- A role must be assigned to the contact when associating it to the record.
- Click the *Remove* button to remove the association between the record and the highlighted contact.
- Clicking the *Remove* button removes the association immediately without a confirmation prompt.

Movements Tab

- This tab lists all activity for the record.
- The *Movements* Tab is available only when opening the Safe Custody Record window for an existing record. The tab is not present when creating a new record.
- Date of activity, the person involved, and additional notes are displayed.
- This tab contains the same properties of all grid tabs in PCLaw, and can be customized to display fewer columns.
- Click the *Add* Tab to record additional activity to the record.
- Clicking the *Add* Tab opens the Safe Custody Movement window. Refer to “Documenting Movements” on page 86 for more information.
- Click the *Remove* button to delete the movement from the record.
- Clicking the Remove button removes the association immediately without a confirmation prompt.

Documenting Movements

File > Safe Custody Manager > All Packets Tab > Move button

Use the Safe Custody Movement window to post activity on one or more records selected on one or more packets by a selected recipient. A printed copy of the movement can be created, including the requirement for the recipient signature. Records are listed in order by packet number and item numbers respectively and cannot be sorted.

A movement can only be added or viewed. Once a movement is created, it cannot be edited, only removed.

Movements are listed on the Safe Custody Listing, and on the Movements Tab of the Safe Custody Record window.

The Safe Custody Movement window can be opened by either clicking the Move button on the All Packets Tab in the Safe Custody Manager window or by clicking the Add button on the Movements Tab in the Safe Custody Record window.

Sel	Packet	Item	Date	Type	Description
<input checked="" type="checkbox"/>	1	1	3/29/2012	CE	Bond Certificate
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Movement Details:

Date: 9/12/2012 Recipient: MCC

Status: In Packet Stage: []

Notes: []

Print copy of Movement
 Include Signing Authority

OK Cancel

Safe Custody Movement window

What You Should Know:

Move All Items

- Check this option to select all listed records for all listed packets.
- Unchecking the box deselects all records.

Sel

- Click this option to individually select records.
- Multiple records can be selected for movement.

Date

- Select the movement date.
- Move Date is included on the Safe Custody Listing.

Recipient

- Type or select the user who is responsible for the movement.
- The recipient defaults to the current user logged into PCLaw, but in actuality can be anyone.
- For a recipient who is not a user in PCLaw, simply type the recipient name in the box, and PCLaw will save the name as part of the movement record.
- PCLaw does not create or save a list of recipients, nor does it provide a list of users.
- Move Recipient is included on the Safe Custody Listing.

Status

- Select from the drop-down menu, the new status for the selected records.
- Status selections from the pull-down menu can be added, modified, or removed through the Record Status pop up help on the *Options > Lists > Safe Custody* pull-down menu.
- Refer to “Add Record Type Window” on page 94 for more information.

Stage

- Select from the drop-down menu, the new stage for the selected records.
- Add stages on the drop-down menu, modified, or removed through the Safe Custody Stages pop up help on the *Options > Lists > Safe Custody* pull-down menu.
- Refer to “Record Stages” on page 91 for more information.
- The selected record must have an active stage assigned to make available the *Stage* drop-down menu.
- Apply movements to Stages only on an individual record basis, using the Movements Tab of Safe Custody Records window.
- Movements cannot be applied to Stages as part of a packet, using the Packets Tab of Safe Custody Manager. The Stage drop-down menu remains unavailable when accessed through this portal.

Notes

- Type any information significant for the movement of the selected records.
- Move Notes are included on the Safe Custody Listing.

Print Copy of Movement

- Check to print a Record Movement Authority containing packet number, date, moved by, recipient, notes, record number, and description of the record.

Include Signing Authority

- Check to include an additional section on the Record Movement Authority.
- The section states “(I/We), the undersigned, have today received the above (item/s) listed”.
- The section includes places for the Recipient's name, signature, and date.

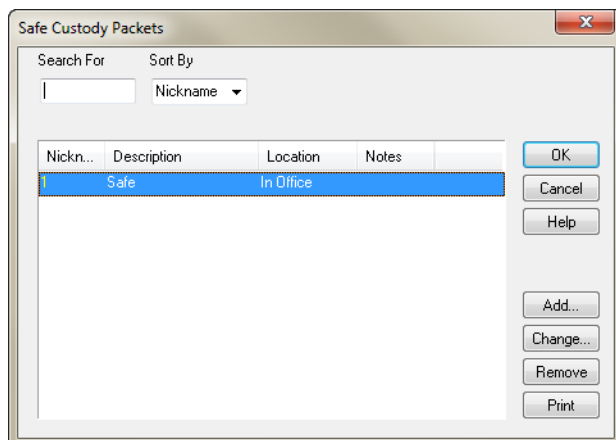
Customizing Safe Custody Pop Up Help

Implementing Safe Custody Manager results in the creation of 5 new Pop Up Help windows. These windows are grouped as a sub-menu, on the *Options > Lists* pull-down menu and appear repeatedly through Safe Custody Manager, as either drop-down menus or as Pop Up Help selection windows, when double-clicking or clicking the arrow on a given field. These windows follow the standard layout of other PCLaw Pop Up Help windows and are described in the following pages in the order listed on the sub-menu.

Packets

Options > Lists > Safe Custody > Record Packets

Packets are the container or receptacle that holds the physical item. Packets can be added and maintained on a new Pop Up Help list for Packets. PCLaw does not provide a pre-existing list of packets, therefore a packets list must be created by the firm.



Packets window

Use the Add/Change Safe Custody Packet window to create new packets. PCLaw assigns a unique packet number for each matter. Location and status can also be determined. The Add - Safe Custody Packet window can only be accessed by clicking the Add button on the Packets pop up help window. The Change - Safe Custody Packet window can be accessed either by clicking the Edit button on the All Packets Tab of Safe Custody Manager or the Change button in the Packets pop up help window.

Packet Description

Location

Termination
Terminated

Note

Records

Item	Date	Type	Description	Terminate	Status	Review

Add... Remove... OK Cancel Spell...

Add - Safe Custody Packet window

What You Should Know:**Packet**

- Nickname increments automatically from last packet created.
- Packet number is unique and cannot be reused.

Location

- Select the location code for the packet.
- Packets use the same location code as does the Calendar.

Terminated

- When a location code is deleted, a check mark appears in this box.
- A packet is normally terminated by clicking the Terminate button in the Safe Custody Manager.
- A date field is subsequently displayed representing the final termination date.
- Prior to a packet termination being finalized, final procedures must take place such as the delivery or return of procedures to the client, or the proper placement or disposing of the packet. This process may require approval from the client and individuals from the firm.

Records

- Grid area lists the contents of the packet.
- The physical properties of the record are listed, such as the item number, inclusion date, type, and description.
- Selected activity for the records are displayed, such as termination or review dates, and status of the records.

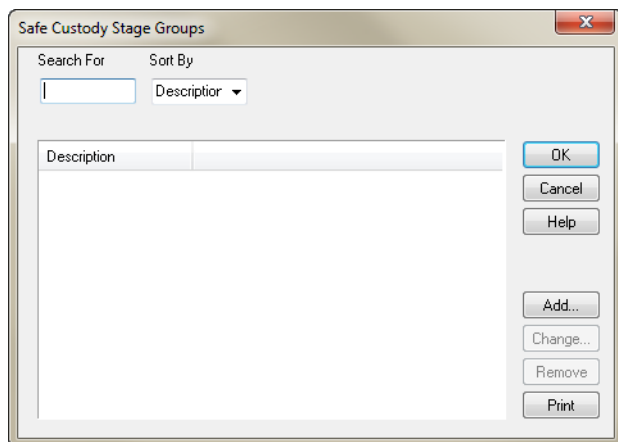
Add

- Click to add new records to the packet.
- Opens the Safe Custody Records window.
- This button is not available until the packet is saved.

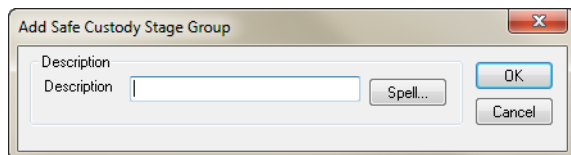
Record Stage Groups**Options > Lists > Safe Custody > Record Stage Groups**

Record Stage Groups are a titles for the life cycle of Record Stages. For instance, the life cycle for a will may include preparation, final client approval, and execution. These individual items are the Record Stages, under the Record Stage Group, which is Will.

Record Stage Groups are assigned to Record Stages during the creation or modification of the latter. Refer to “Record Stages” on page 91 for more information. Stage Groups are also assigned to Record Types. Refer to “Record Types” on page 93 for more information.

**Record Stage Groups window**

The Safe Custody Stage Groups consists of a description only.

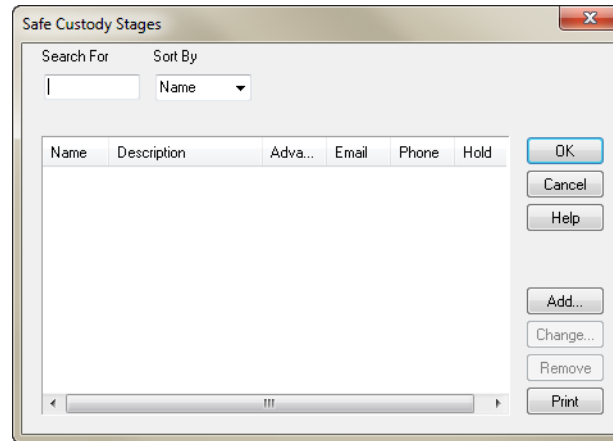
**Add Safe Custody Stage Group window**

Stage groups do not utilize nicknames.

Record Stages**Options > Lists > Safe Custody > Record Stages**

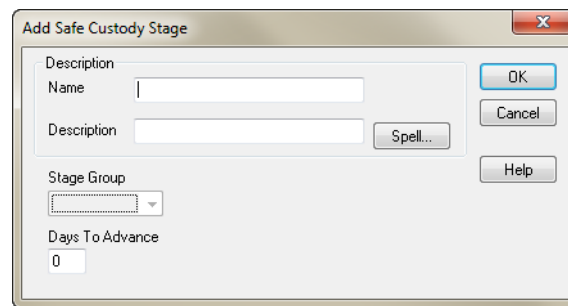
Record Stages is representative of the life cycle of the custody item. For instance, the life cycle for a will may include preparation, final client approval, and execution. These individual items are the

Record Stages. Record Stage Groups are assigned to collect the stages for a defined process.



Record Stage Groups window

The Safe Custody Stage Groups consists of a name and description only.



Add Safe Custody Stage Group window

What You Should Know:

Stage Group

- Select the stage group from the drop-down list.
- The drop-down list is populated through the Pop Up Help window for Record Stage Groups.

Days to Advance

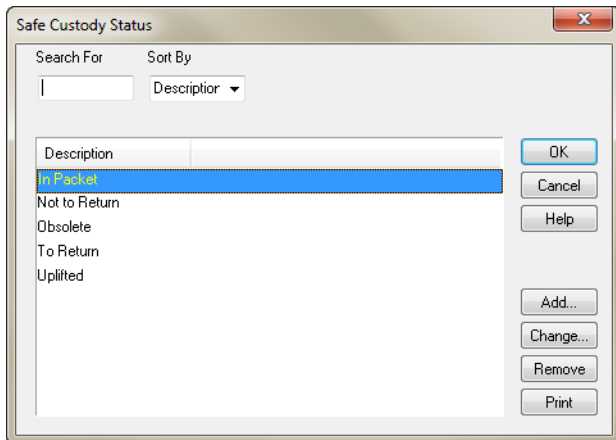
- Type the number of days to advance the Review date of the record when selecting this stage during a movement.

Record Status

Options > Lists > Safe Custody > Record Status

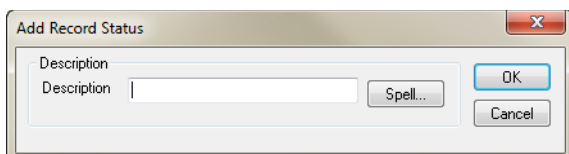
Record status reports on the current stage of the record, whether it is contained in the packet, signed out by a lawyer or staff member, to be returned to the client, stored, or is no longer of value PCLaw provides a default list of record status item. Expand the list or modify existing items to best meet the needs of your firm.

Record status is added to the Safe Custody Record upon creation. Refer to “Creating Safe Custody Records” on page 83 for more information. Its setting can subsequently be modified when updating the Safe Custody Record itself, or when documenting a movement on the record. Refer to “Documenting Movements” on page 86 for more information.



Record Status window

Record status consists of a description only. Status is selected on various Safe Custody windows in the form of a drop-down menu.

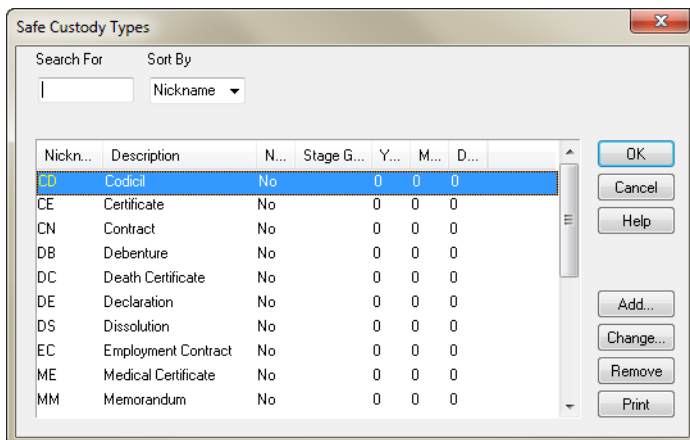


Add Record Status window

Record Types

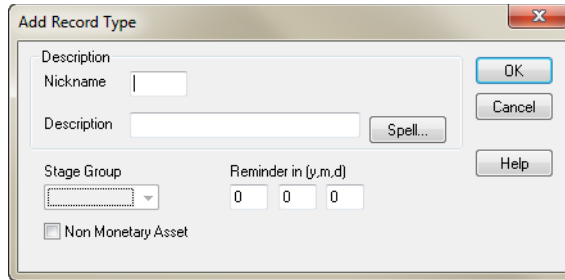
Options > Lists > Safe Custody > Record Types

Record types groups records by categories, in addition to distinguishing whether, or if it is a monetary asset.



Record Types window

Record types consist of a nickname and name. The type can further be assigned to a stage group, be declared a non-monetary asset, and can be given a reminder date for when action must be taken on this record.



Add Record Type Window

What You Have Learned:

You have learned how to manage the non-financial data and property of the firm. You can now add and maintain contacts, schedule timekeepers using the Calendar, track both internal and external messaging, and manage electronic documentation and physical property.

Exercise 5 - Front Office

The following exercise involves many of the options and features of the Front Office modules covered in the eLearning 5 Front Office session, as well as a few tasks that were not covered, to test your intrinsic knowledge of the application. All tasks should be performed in the PCLaw Demo set of books created and populated in the previous exercises.

In all tasks you will be assuming the role of the administrative assistant, overseeing advanced tasks in PCLaw.

Task 1

Peter Charles Law has decided to use PCLaw as the firm's front office application. He requested you as the administrator, to plan and implement the procedure to make this happen. You decide that the following tasks are necessary:

1. Confirm that PCLaw can connect to Windows Explorer, Internet Explorer, and Microsoft Word.
2. Enable Calendar, Phone Call Manager, and Safe Custody Manager.
3. Enable Document Manager with the following information:
 - Precedents are saved by Document Type.
 - A directory "Legacy" is created as a sub-folder of PCLawDocs.
 - Leave the Letter and Document folders blank for now.
4. Ensure that PCLaw fields in Microsoft Word documents are always updated for your workstation.
5. Activate Calendar for all Timekeepers.

Task 2

John Hapsburg, whose office is on 1444 Ontario St. Buffalo NY, is the world's foremost authority on stress related illness. You are asked to add him as a contact and to associate him with Damien Hawerchuk's matter, as the firm intends to appeal the judgement against him.

Task 3

Peter Charles Law has deemed that the firm should hold the following company meetings and has asked you to input them into the Calendar.

1. A one hour meeting for partners only, held on every Friday of the month at 2 pm in the boardroom.
2. For all lawyers, a half-hour meeting held on the first Monday of each month, at 9 am in the main office.
3. It has been brought to your attention that the lawyer meeting for next month falls on a holiday. Therefore, you need to create a continuance to move it to Wednesday morning at 9 am.

Task 4

You have taken a message from John Hapsburg for Peter Charles Law, who is currently on lunch. The call was urgent, concerning the matter for which he was retained, and requires a call back at 555-1234. Send the message to Peter.

Task 5

You have been asked to set up Safe Custody Manager. You have determined that the following information needs to be added.

1. Packets:

- File Cabinet
- Storeroom
- Office Safe
- Safety Deposit box

Record Stage Groups

- Custodian

Record Stages

- Incoming
- Custody
- Return to Client

Task 6

The following items are received by the firm and need to be tracked using the Safe Custody Manager.

- Deed to property on Main street in Buffalo for matter 102-001.
- Personal belongings from the office of John Wails, which must be returned to him upon settlement of a severance agreement. This was signed out by Peter Charles Law immediately for inventory purposes.
- A GIC certificate for \$500,000 from Damien Hawerchuk must be turned over to the former Mrs. Hawerchuk, if an appeal of judgement is not successful.