

# Amicus Attorney News

The Official Newsletter of Amicus Attorney

December  
2003

Volume 1  
Issue 11

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1. [Happy Holidays](#)

It's that time of year again and the holiday season is upon us! Here is our holiday operating schedule. Unless noted below, all other weekdays will have standard business hours of operation.

On Wednesday December 17, 2003, we will be closing our offices at 6:00pm EST so that our entire staff can enjoy a special company holiday function.

### Holiday Operating Schedule

Wednesday December 17, 2003 – 8:30am – 6:00pm EST

Wednesday December 24, 2003 – 8:30am – 1:00pm EST

Thursday December 25, 2003 – CLOSED

Friday December 26, 2003 – 9:00am – 6:00pm EST

Wednesday December 31, 2003 – 8:30am – 3:00pm EST

Thursday January 1, 2004 – CLOSED

All of us at Gavel & Gown Software Inc. would like to wish you and your family a safe and happy holiday season.

### Legal Laugh

Your monthly dose of humor...

### INTRODUCTION to AMICUS ATTORNEY V

#### Your Step by Step Guide (5.1.1)

by Lori Berenson

This 250 page comprehensive training manual, designed for beginner and intermediate users of Amicus Attorney, is available for purchase on the Amicus Attorney

2. [You Have to Try This!](#)

*Practical Tips and Tricks from Amicus Attorney Certified Consultants*



### Calendar Preferences

By Lori Berenson

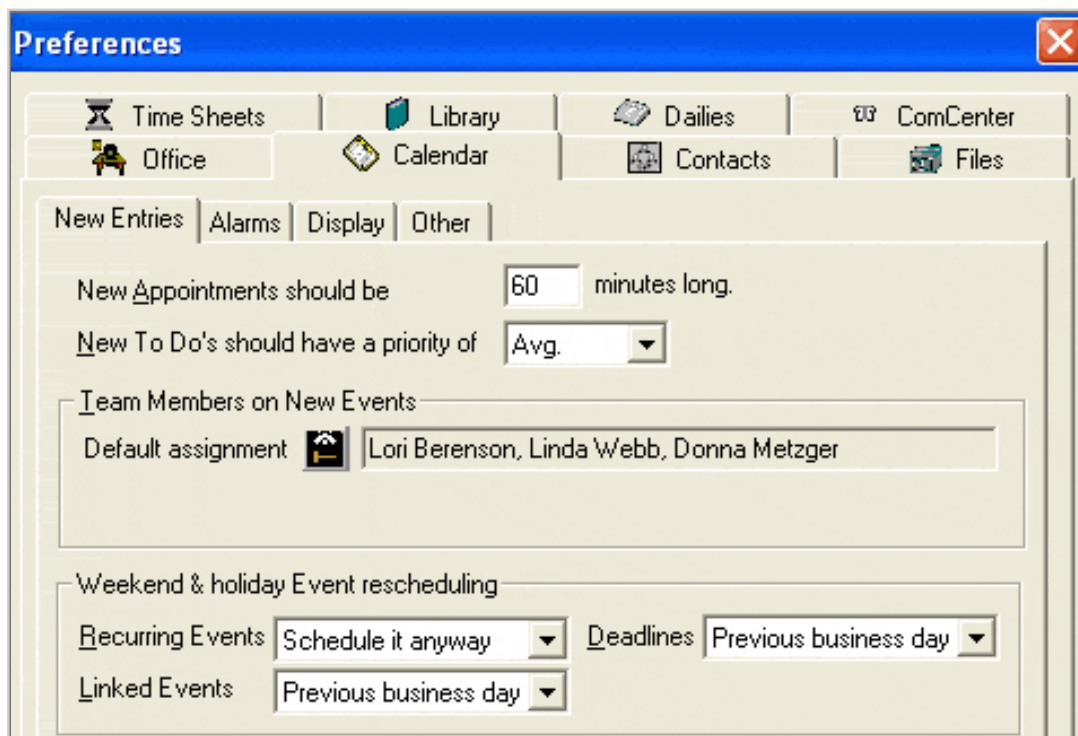
If you have been using Amicus Attorney for a long time, you may have set your

individual preferences for the configuration that you like in your own Amicus Attorney office. However, maybe you haven't had a chance to play with the preferences yet, or didn't even know that you could change some of the settings.

Listed below are some of the common preference modifications that I suggest to my clients (and I have made similar modifications in my Amicus Office). Keep in mind that these are just the default settings, and that you can change most of these items manually for individual items.

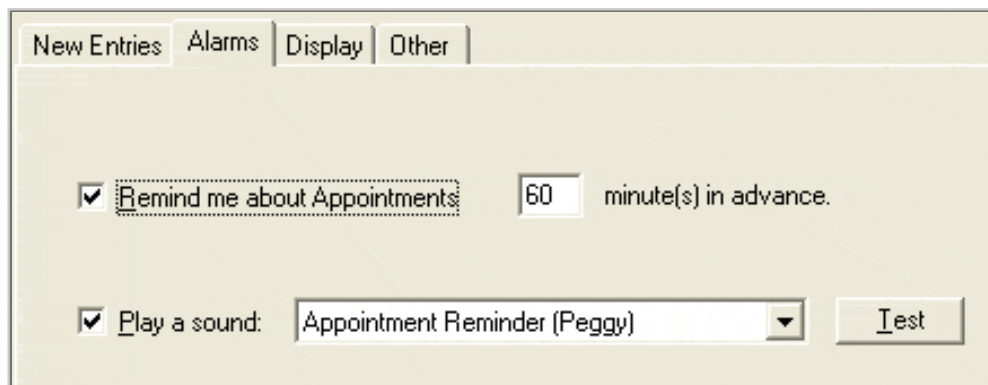
web site. For a listing of topics covered and sample lessons of this easy-to-follow learning guide, [click here](#).

**Select File – Preferences and click on the Calendar tab.**



### New Entries tab

- 1) The default 'New Appointments should be' is 90 minutes. Set yours for the average time of your new appointments.
- 2) The default 'Team Members on New Events' is only you. Make sure to add other team members if you would like them to be assigned to most events that you create.
- 3) Weekend & holiday Event rescheduling – I always set the 'Deadlines' and 'Linked Events' to 'Previous Business Day', and 'Recurring Events' to 'Schedule it anyway'.



## Alarms tab

- 1) If you have speakers, it is very helpful to be reminded prior to your appointments - the default 'Remind me about Appointments' is 10 minutes. Set yours to your liking, knowing that reminders for individual appointments can be changed as needed.
- 2) Try some of the other sounds, and select the one to your liking. I really like Peggy's voice – she sounds very professional!

The screenshot shows the 'Alarms' tab in a calendar application. It has four sub-sections: 'Sorting', 'Time displays', and 'Other'.  
- 'Sorting': 'The daily To Do list should be sorted by:' is set to 'Priority' and 'Event lists should be sorted by:' is set to 'Date'.  
- 'Time displays': 'In the day view, use:' is 'am/pm', 'In the week view, use:' is 'a/p', and 'In the month view, use:' is 'none'.  
- 'Other': 'Show the next' is set to '1' occurrence(s) of recurring Events in Event lists. The checkbox 'Calendar pages cannot be altered once they are more than' is checked, with '10' days old.

## Display tab

- 1) The only possible change I would make here is the very last item – 'Calendar pages cannot be altered once they are more than \_\_\_ days old'. This item is selected on default and the number of days is 10. I turn mine off so that I can modify events in the past. However, if you are using your calendar as an "audit trail", which can provide a complete record of when and what you were doing, you may want to leave the default selected so that events in the past cannot be accidentally (or purposely) changed.

The screenshot shows the 'Display' tab in a calendar application. It has three sub-sections:  
- A checked checkbox: 'Display Event Details when I click & drag a new Appointment'.  
- 'When I convert a To Do to an Appointment, schedule it at :' is set to '09:00'.  
- 'When a Do button is clicked, mark the To Do done:' has three radio buttons: 'Never', 'Always' (selected), and 'Ask'.  
- 'When a Do button is clicked, start a timer:' has three radio buttons: 'Never', 'Always' (selected), and 'Ask'.

## Other tab

- 1) 'When a Do button is clicked, mark the To Do done' – this is really a personal preference. Often when you click a Do button on your To Do list, you don't know whether the To Do will be completed in its entirety.

a) If you select 'Never', you will always have to remember to click the 'Done' box when a

To Do is complete – otherwise, it will continue to carry over to the next day until you mark it 'Done'.

b) If you select 'Always', and you did not actually complete the To Do, the To Do will move to the bottom of the To Do list and you can uncheck it. However, if you realize the following day that you forgot to uncheck it, you will have to click on Events and display the 'Done To Do's' list to locate the To Do to uncheck it. (Or you can find the To Do on the Brad list of the File or Contact).

c) A good compromise is to select 'Ask'. That way, when you click on each To Do, you can decide at that time whether or not you are likely to complete that To Do.

2) 'When a Do button is clicked, start a timer' – this is dependent on whether or not you bill for your time – and if you use the timer. If you do not bill for your time, select 'Never'; if you always bill for your time, select 'Always'; if you sometimes bill for your time, select 'Ask'.

In future issues, I will address Preferences in the other Amicus Attorney modules.

*Compliments of:*

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*Lori Berenson is the author of the highly acclaimed "Your Step by Step Guide to Amicus Attorney". Lori is currently working as a Legal Applications Consultant for Accellis Technology Group, offering consulting and training services for Amicus Attorney users, as well as other legal application services. Visit Accellis' website at [www.accellis.com](http://www.accellis.com), or call (440) 893-9600 x102 for more information about their legal consulting and networking services.*



### **Legal Tips**

*Tips from Legal Industry Experts on How to Effectively Manage Your Practice*



## **PART 2: Are We Managing Our Risks or Are They Managing Us?**

*By Nancy Byerly Jones, PLLC*

Reprinted with permission from Lawyers Weekly USA. The full article originally appeared and is available in the July 21st, 2003 issue. [www.lawyersweekly.com](http://www.lawyersweekly.com)

### **Confidentiality Self-Audit**

Confidentiality – we believe in it and certainly advocate the need for it to be protected. Are we, however, taking enough precautions to protect it in our firms? The following self-audit is a starting point for evaluating this critical part of your overall risk management plan:

- Do all employees at the onset of their employment with your firm sign a confidentiality form acknowledging that they have discussed confidentiality with a supervisor, they have read the relevant ethical rules, and that they will comply with safeguarding client confidentialities during and following their association with the firm?
- Is confidentiality a topic covered in your firm's policy and procedures manual?
- Are law office employees aware of the firm's policies and procedures regarding confidentiality?
- Does your firm require all employees to review all applicable confidentiality rules and guidelines at least annually, giving each of them an opportunity to ask about any questions they may have?
- Are all departing employees reminded during their exit interviews that they must continue to hold all client information confidential just as they have been instructed to do during their tenure with the firm?

- Does your firm have policies and procedures for ensuring that no client files or other confidential materials are ever left in any public access or reception areas? (i.e. locking file cabinets that are located in common areas)
- Is your firm's reception room arranged such that clients and other visitors cannot overhear confidential conversations that may occur in nearby conference rooms, offices or kitchen areas?
- When people are in the reception area, is the receptionist trained to protect the confidentiality of client names and matters when the receptionist is talking with others?
- Are client meetings held in a conference room, office or other area where client files and materials are visible?
- Are clients or other visitors left unattended in an area where confidential data may be easily scanned by curious eyes?
- When conferring with clients in person, have your attorneys and staff been taught to avoid taking calls or otherwise talking with others to protect client identities and confidentialities?
- Are your facsimile machines and copiers located away from areas where visitors may be able to see confidential materials?
- If you are in an office-sharing arrangement, have you discussed confidentiality with the landlord, other tenants, and any employees who may be privy to confidential information?
- If your firm has a computer maintenance contract, have you made reasonable efforts to ensure that all third parties with access to your computer will protect the confidentiality of any and all client information?
- Are employees reminded of the potential for cell phone conversations to be intercepted by hackers and the like and, therefore, not to mention clients' full names or any other confidential information when talking on their cell phones?
- Are your firm's clients reminded of the potential for a breach of confidentiality over mobile phones?
- Does your firm train employees on what types of information can be sent by e-mail and what types of things should never be sent via e-mail unless encryption software is used?
- Are employees made aware that any breach of confidential information will be cause for immediate disciplinary action (including possible termination)?

When thinking about how your firm protects client confidentialities, consider what can be done differently in order to better safeguard such information. Ask yourself, "If I were a client, would I expect my file documents and my conversations with firm employees to be protected?" If you aren't happy with your answers when looking at confidentiality from a client's perspective, then chances are quite good that some of your systems and procedures need some immediate repair work.

If you have been reminded of some of the weak links within your firm, then it has been worth your time to read this because hopefully you plan to strengthen those areas needing attention.

Compliments of:

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*Attorney and mediator Nancy Byerly Jones practices law, serves as a law office consultant and runs an attorney/staff retreat center in northwestern North Carolina. She and her husband live on a mountainside ranch with their dogs, miniature donkeys and horses. For more information, please visit [www.nbjconsulting.com](http://www.nbjconsulting.com), call (828) 898-9600, or send an e-mail to [nbj@nbjconsulting.com](mailto:nbj@nbjconsulting.com).*



## Spotlight On ...

*Highlighting a Feature of Amicus Attorney*



Time for those Holiday Cards again...

## Printing Labels for Mailings, File Folders, Packages and More...

At this busy time of year, we all could use some helpful tips for saving time. Here's how you can create labels for your holiday cards and packages – quickly and easily.

### Step #1:

Identify which contacts you would like to select from.

In the Contacts module, you can choose to:

**Show All** – displays all contacts in the database. You can then highlight the contacts you would like to create a label for. You can sort by Name, Company Name or Group by simply clicking on the appropriate tab at the top of the contact list.

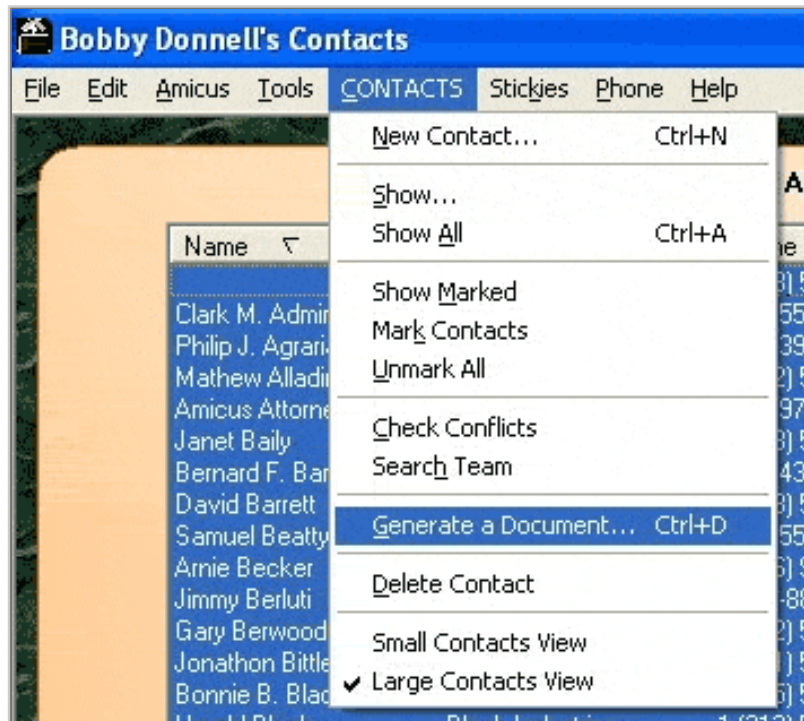
**Show...** – this displays all of the "Contact Groups" that you have set-up in Amicus Attorney. Select the appropriate group(s) and press OK. All contacts that are assigned to this group will appear. You can then highlight the contacts you would like to create a label for.

### Step #2:

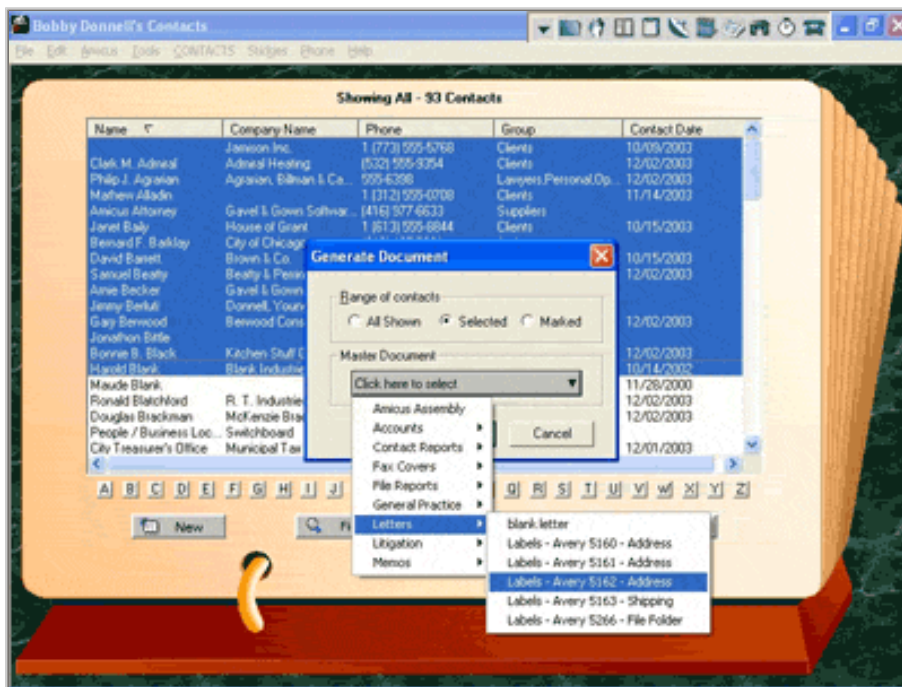
Print labels from the Contacts module.

You can generate labels from the Contacts Index or from within any Contact detail.

1. Open the CONTACTS menu and choose Generate a Document.



2. If you are in the Contacts Index, specify whether you want to generate a label or document for all Contacts shown in the index, for the Contacts that are selected, or for the Contacts that are marked. Click the All Shown, Selected, or Marked button as appropriate.



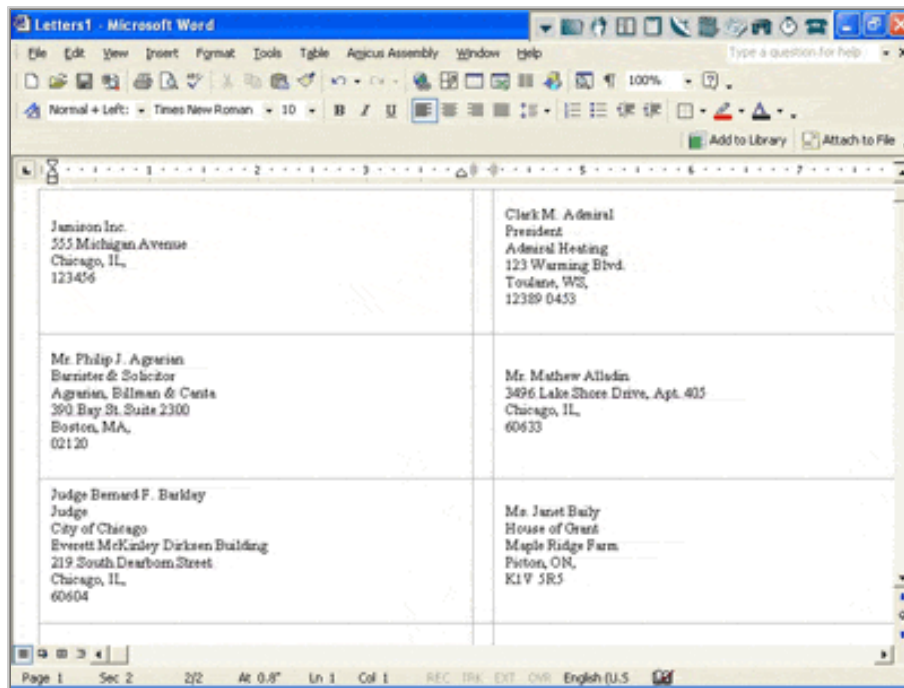
3. From the Master Document drop-down list, choose Letter, then choose the appropriate label type. For your convenience, the following label types are included:

- Labels - Avery 5160 - Address
- Labels - Avery 5161 - Address
- Labels - Avery 5152 - Address
- Labels - Avery 5163 - Shipping
- Labels - Avery 5266 - File Folder

(These are the standard templates that will meet most of your requirements. They can be modified to incorporate further information if you wish, or you can create entirely new master documents to meet your specific needs.)

4. Click OK.

5. Your Document Assembly program (Word® or WordPerfect®) opens and the Label Template is merged with your data, provided that the auto-merge setting has been activated. You can review the document and edit it if necessary, then print or save the document. (You will be required to click the Perform Merge button in your word processor toolbar if you have not enabled the setting for the auto-merge of standard document templates)



The labels will be automatically formatted to the size specifications of the label selected and will include the up-to-date contact details from Amicus Attorney.

*For more information on generating documents with Amicus Attorney, please see Chapter 13 of the User Guide - Working with document assembly.*

### **Assigning People to Contact Groups**

Since you deal with many people in the course of your practice, it makes sense to organize them into Contact Groups. By doing this, you can create groups that have special significance for your firm. You can then look up your Contacts by group—a list of all lawyers, say, or all Clients. You can assign a Contact to as many Contact Groups as you deem appropriate.

#### **To assign a Contact to Contact Groups:**

1. Open the person's Contact detail.
2. Choose Contact Groups from the drop-down list on the right side of the Contact detail.
3. Click Edit.
4. Select the Contact Groups to which you wish to assign this Contact, then click OK.

Note: If you have Advanced or Client/Server Edition, then your Amicus Administrator can customize the list of Contact Groups. If you do not see the desired Contact Group, ask your Team Administrator to add it to the list.

You can create a contact group titled "Holiday or Greeting Cards", to easily identify all of the contacts you would like to send a card to.

## YOUR LEGAL LAUGH

Your monthly dose of humor...



Compliments of: [www.legalhumor.com](http://www.legalhumor.com).

### 5. FAQs - Frequently Asked Questions

*Our Customer Service Team provides answers to some common technical questions*



#### **Cannot Go Online because there is no connection to the Server**

##### **Issue:**

When you launch your Amicus Attorney Office, you receive the following message: You are currently running offline. When you try to "Go Online" you receive the following message: You cannot go online because there is no connection to the Server.

##### **Cause:**

The drive that was mapped from the Team Member workstation to the Server hosting the Team database has been disconnected, OR the TCP/IP configuration has been changed.

##### **Solution:**

Re-map the disconnected drive, OR confirm your TCP/IP settings.

##### **A. If the mapping has been disconnected:**

Determining the drive you need to map:

1. From a Team Member workstation that is not experiencing the error, go to Start > Run and type in C:\Windows\Aa\*0.ini. Click OK.
2. The Aa\*0.ini file appears in Notepad. Scroll down until you find the [Paths] section.
3. Note the ServerAmicusPath (e.g., K:\Program Files\Team\*0), and close the file.
4. From the desktop, double-click on My Computer and note the name of the drive letter (e.g., "C on 'AmicusServer' [K:]").

## Mapping the drive:

1. From the Team Member workstation experiencing the problem, repeat steps 1-3.

**Note:** The ServerAmicusPath may read the same (e.g., K:\Program Files\Team\*0), or it may begin with a different drive letter (e.g., J:\Program Files\Team\*0). The drive letter is important as it is used to identify the mapping to the computer hosting the Server from the Team Member workstation that is experiencing the problem.

2. Double-click on Network Neighborhood, and then double-click on the computer hosting the Team\*0 database folder (i.e., the computer hosting the Server).

3. Right-click on the proper shared folder (in the above example, "C") and choose Map Network Drive.

4. In the Map Network Drive dialog, choose the drive letter designated in the ServerAmicusPath in the Aa\*0.ini file (i.e., the path to the Server from the problem Team Member workstation) and ensure that "Reconnect at Logon" checkbox is activated. Click OK.

**Note:** For more information on mapping a network drive, see the FAQ: How do I Map a Network Drive?

5. Close all open windows and launch Amicus Attorney.

You should receive a message stating you were offline but now the connection to the Server has been restored.

## **B. To confirm that there is a problem with the TCP/IP configuration:**

1. Open the \Team\*0\Aateam\*0.ini file on the Server and make note of the IP address number in this file.

2. From the Team Member workstation experiencing the problem, click the Start button, highlight Programs, and choose Command Prompt. Attempt to "ping" this IP address number by typing ping [IP Address].

3. If there is a problem, then it will either report that it cannot establish a connection or it will read: "Request Timed Out".

4. To check the IP address of the Server; from the workstation hosting the Server, click Start, select Programs, and choose Command Prompt.

In the Command Prompt screen, type IPCONFIG and press Enter.

Your screen lists the IP address, Subnet Mask, and the Default Gateway assigned to the computer to access the network.

5. Make sure that the IP address you receive here, matches the IP Address found in the \Team\*0\Aateam\*0.ini file on the workstation hosting the Server.

If the IP Addresses do not match, then attempt to "ping" the new IP Address.

6. Make the correction to the Team\*0\Aateam\*0.ini file on the computer hosting the Server and launch the Amicus Attorney Team Member Office.

If the error persists, or if you were not able to get the response from attempting to "ping" the new IP Address, then from the Desktop of the workstation hosting the Server, right-click on Network Neighborhood, and choose Properties.

The Network dialog appears.

From the Network Identification tab, note the name in the Computer Name field.

Go to the DOS prompt on the Team Member workstation and type ping [Computer Name]. If you are able to "ping" the Computer Name but not the IP address, then the Server may have more than 1 network card attached to the Team Member workstation and possibly more than one IP address assigned to the Team Member workstation.

Contact your Network Administrator to re-evaluate your network configuration and attempt this again.

## **6. Amicus Attorney Premier Consultants** *Training, Events and More!*



Amicus Attorney Premier Consultants are professionals who are nationally qualified to sell and install all Amicus Attorney products and to provide their customers with on-site training and support.

### **Training Programs Offered by our Premier Consultants:**

Here are some of the training sessions being offered by some of our Premier Consultants. For more information or to register for a class, please contact the consultant firm directly. All times listed in EST unless otherwise indicated.

### **CLASSROOM TRAINING:**

#### **Best Law Firm Solutions Inc.**

Atlanta, GA

(770) 998-3800

[www.bestlawfirm.com](http://www.bestlawfirm.com)

*For more details, visit their [web site](#).*

Date	Time	Training Session	Location
December 11th, 2003	9:00 am – 4:00 pm	Advanced Amicus Attorney Workshop	Atlanta, GA
December 12th, 2003	9:00 am – 4:00 pm	The Amicus Administrator Workshop	Atlanta, GA

### **ONLINE & CD-ROM TRAINING PROGRAMS:**

#### **CD-ROM TRAINING**

#### **2b1 Inc.**

San Francisco, CA

(415) 284-2221

[www.2b1inc.com](http://www.2b1inc.com)

It's basic! Whether you need to get started or brush up on your Amicus Attorney skills, Amicus Attorney V Basic Training is the perfect desktop training tool. Easy-to-follow animation covers all of the basic functions of Amicus Attorney V. The training is available for download as well as on CD-ROM.

*To download a copy or get more information, visit <http://www.2b1inc.com/c-training.htm>.*

### **WEB BASED TRAINING**

#### **ProBill Law Firm Solutions**

Boca Raton, FL

(800) 299-9177

[www.probill.net](http://www.probill.net)

*For more details, visit their [web site](#).*

Date	Time	Training Session	Location
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Flexible Dates	9:00 am 11:00 am 1:00 pm 3:00 pm or 5:00pm Weekend and late nights available.	eClass Training (Web Based training) - <i>choose from:</i> Basic Application Training Advanced Application Training Application Troubleshooting Quick Start (New Clients Only)	Web based - You can take eclasses directly from your own computer.
December 4th, 2003	3:00 pm	<b>TRN201 Amicus Attorney - Basics</b> Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based
December 5th, 2003	2:00 pm	<b>TRN202 Amicus Attorney - Advanced Calendar</b> Court rules, attaching actions to a calendar event such as generating a document or sending an email, working with the group calendar and more	Web based
December 8th, 2003	3:00 pm	<b>TRN203 Amicus Attorney - Document Assembly</b> Merge information from Amicus Attorney into your documents while linking the document to a File for future reference	Web based
December 9th, 2003	3:00 pm	<b>TRN204 Amicus Attorney - The Library</b> Organize your research materials for easy retrieval, i.e., word processing documents, spreadsheets, websites, paid services.	Web based
December 10th, 2003	3:00 pm	<b>TRN207 Amicus Attorney - ComCenter</b> Everything you need to know about managing emails in Amicus including attaching emails to Files and Contacts. This class also covers other functions of ComCenter namely sending interoffice messages and initiating phone calls.	Web based
December 11th, 2003	3:00 pm	<b>TRN205 Amicus Attorney - Timeslips Link</b> Use Amicus Attorney to track your time as you work then transfer it to Timeslips for billing. Exchange contact information between the programs.	Web based
December 15th, 2003	3:00 pm	<b>TRN206 Amicus Attorney - QuickBooks Link</b> Use Amicus Attorney to track your time as you work then transfer it to QuickBooks for billing. Exchange contact information between the programs.	Web based

## Events

Watch for Amicus Attorney at these events.



For a complete listing of National and Regional Events visit [www.amicusattorney.com](http://www.amicusattorney.com)

### 2004

Date	Event	Location
February 2-4, 2004	<b>LegalTech New York</b> <b>Visit us in Booth #317 &amp; 319</b>  For more information: <a href="http://www.legaltechshow.com">www.legaltechshow.com</a>	Hilton New York Hotel & Towers New York, NY
March 25-27, 2004	<b>ABA Techshow</b> <b>Visit us in Booth #513 &amp; 515</b>  For more information: <a href="http://www.techshow.com">www.techshow.com</a>	Sheraton Chicago Chicago, IL

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