

# Amicus Attorney News

The Official Newsletter of Amicus Attorney

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Volume 2

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[amicusattorney.com](http://amicusattorney.com)



## 1. [Get Ready for the Ultimate Practice Management Tool...](#)

### Amicus Attorney X

Attendees at the LegalTech New York show earlier this month got a sneak preview of what the next generation of the Amicus Attorney is going to look like. Ron Collins, President and Founder of Gavel & Gown Software Inc., was on hand to announce to the legal technology community that the next version of Amicus Attorney - Amicus Attorney X - was due to ship later this spring.

The new product includes several new modules and a huge step forward in technology. Amicus Attorney X runs entirely in a browser. All you need is Internet Explorer and you can access your Amicus Attorney from anywhere you access the Internet - anytime, anywhere.

The early feedback on Amicus X has been outstanding and we are eagerly anticipating the launch of this revolutionary new product. We will be sure to keep you posted on when Amicus Attorney X will be available for purchase. Watch for further details in upcoming newsletters.

For more information on Amicus Attorney X – [click here](#).

### SUGGESTIONS

Is there a particular tip or feature you would like to see in the next newsletter? If so, send us an e-mail and tell us what you would like to read about. We will do our best to include it in one of our future issues.

[amicusnews@amicusattorney.com](mailto:amicusnews@amicusattorney.com)

### Missed An Issue?

Missed an issue? No problem. Visit our web site and you'll be able to view or print from our archives of past issues. [Click here](#).

### Legal Laugh

Your monthly dose of humor...

## 2. [Legal Tips](#)

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



### Internet Policies

*By Edward Poll, J.D., M.B.A., CMC*

In a recent roundtable discussion with several managing partners of large firms, I asked whether they had Internet policies for their lawyers and for their staff. Their initial response was that there were no restrictions on lawyers, and that it was difficult to restrict Internet use, even for staff. It seems that the ubiquitous Internet is open for unlimited use for both lawyers and staff in the larger firms. Is there a policy in your firm? Should there be a policy in your firm?

### Pass It On!

Know someone who would like to receive the Amicus Attorney News? Simply send this issue to them and with one click of the "Subscribe Here" button below, they can also start receiving it monthly.

Because of recent awards against law firms for harassment, wrongful termination of employment, and other such torts where discovery of Internet activity has been used as evidence, many firms are now at least discussing having an Internet policy.

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The managing partners concluded that they did indeed have policies in place, including the basic one specifying that the Internet (and e-mail) is only to be used for work-related, not personal, matters. Many also blocked perceived pornographic sites. Beyond this, most of the managing partners felt that Internet policies were unenforceable and should exist only in the broadest sense, and mostly to combat claims that the firm did not care about providing a safe and "politically correct" workplace. Some of these firms have the right to read everyone's e-mail, though they caution that this "right" should be exercised sparingly because of the hostility that often results from its implementation.

Other Internet policy issues that came out of the roundtable discussion:

Who reads your e-mail? Many lawyers ask their secretaries to read their e-mail, categorize the messages, and then print them out. There is a certain efficiency in this. Emergency issues can be brought to the attention of the lawyer immediately; some matters can be handled by the secretary without the lawyer getting involved; and other matters can wait until the lawyer has time to deal with them. But what about the e-mail intended by the sender to be private and/or confidential? My advice: Beware! Know your system's functions. Some e-mail systems make a distinction between "confidential" and "private," allowing one type of message to be viewed by anyone in the office.

Electronic storage. Some people, myself included, are packrats, and it doesn't matter whether it's hard copy or electronic. In fact, I have changed PCs on occasion because the amount of data I wanted to store was too large for my equipment to operate efficiently. It does not take long for a system to slow down when you store every e-mail message. Some firms have policies of automatic deletion after so many megabytes or the passage of 30 days. Some limit the number of e-mails arriving on any given day, though this policy might be dangerous-the next e-mail might be the urgent one from a client needing immediate assistance!

Client communications. During the first meeting with your client, be sure to discuss the policies in your office about e-mail communications. If there is a cutoff of any kind, instruct the client on how to get e-mail through the system. An example is marking it urgent (see the codes in your system to determine how to set this up). Another is calling your office (secretary) and alerting the firm that a very important e-mail message will follow shortly. This communication policy discussion should occur in every first meeting, but especially if your firm imposes some type of e-mail limitation for storage reasons.

These are just a few of the Internet policy issues you should be thinking about. What is important to you and your firm? Once you know, put it in writing for everyone-lawyers and staff. Enforce your policies uniformly, not sporadically or unevenly based on one's position in the firm.

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*Edward Poll, J.D., M.B.A., CMC, is a coach to lawyers and certified management consultant who shows attorneys and law firms how to be more profitable. Ed's latest book is *Collecting Your Fee: Getting Paid From Intake to Invoice* (ABA 2003); he is the author of *Attorney & Law Firm Guide to The Business of Law, 2d ed.* (ABA 2002); *Secrets of the Business of Law: Successful Practices for Increasing Your Profits.**

## Just a Few of the Customization Options Available in Amicus Attorney...

Within Amicus Attorney there are several customization options, above the standard settings provided, that a firm

can take advantage of. The Administrator can customize the information within Amicus Attorney to exactly meet a firm's specific requirements. Changes to customizable items are best done before entering new information into the team database.

### Customizing Lists:

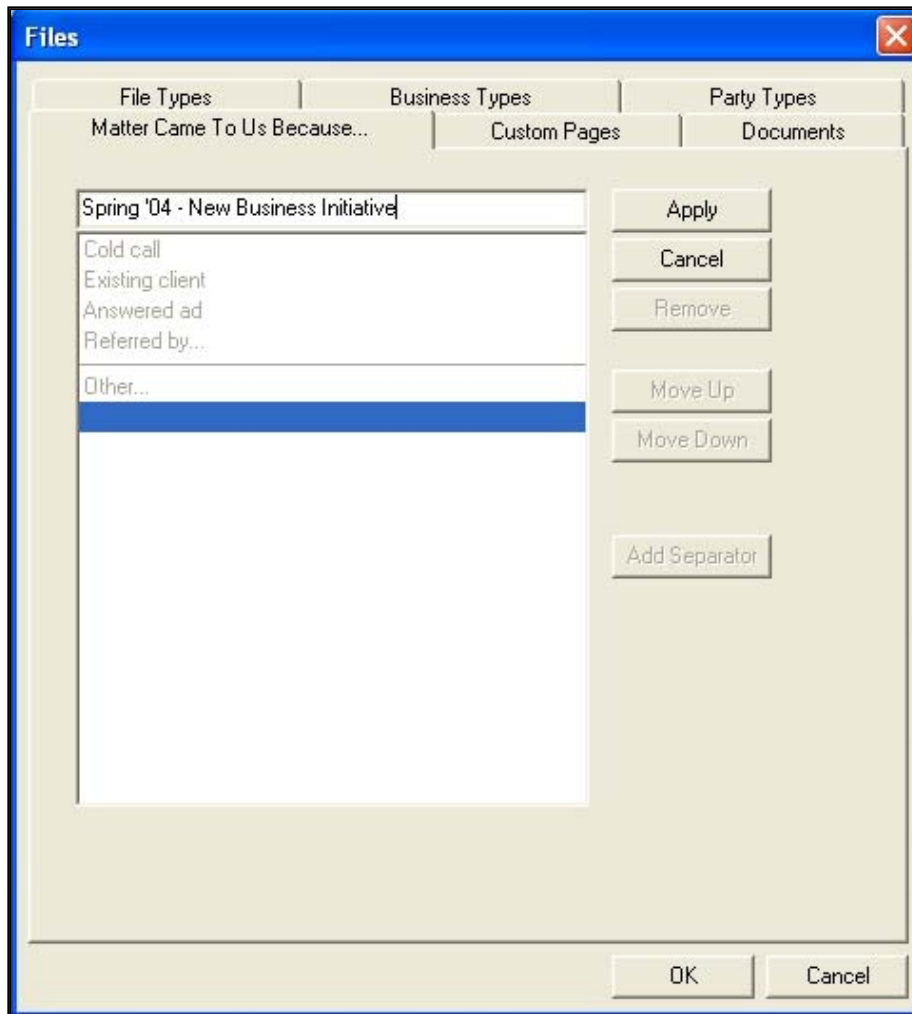
Here are just a few of the drop-down lists that can be modified in Amicus Attorney:

**Billing Categories:** For classifying the method by which a file is billed.  
Choose Time Sheets from the Configure menu > click Billing Categories tab

**Billing Rates:** The standard hourly rates which you charge to clients. These rates are used in setting up files or when doing time entries.

**Business Types:** For tracking the kinds of occupations your clients are involved in.  
Choose Files from the Configure menu > click the Business Types tab

**Came to Us Because...:** You can identify the reason a matter came to you. This is great for tracking the success of marketing and other new business initiatives.  
Choose Files from the Configure menu > click Matter Came to Us Because tab



**File Types:** You can classify your files according to the type of work you are doing on them. You can do searches on file type and create File Types that reflect the type of practice at your firm.  
Choose Files from the Configure menu > click the File Types tab

**Priorities:** You can specify the level of urgency of your to-do list items. You can specify the priority by a numeric scale or using words (i.e. urgent).

Choose Calendar from the Configure menu > click the Priorities tab

When customizing lists, you may notice that some items cannot be renamed, moved, or deleted, and that some lists cannot be added to. Such items and lists have a specialized function in your database; therefore restrictions have been imposed to preserve this function.

### **You can rename, add, delete or change the position of certain list items.**

#### **To rename a list item:**

Click the item in the window > click Edit > Type the name of the item as you want it to appear in its drop down list > click Apply

#### **To add a list item:**

Click New > type the name of the new item as you want it to appear in its drop-down list > click Apply.

*Note: when adding a billing category, a window appears asking whether the new category is billable or non-billable. Double-click the appropriate selection in the window.*

#### **To delete a list item:**

Click the item in the window > click Remove

#### **To change the position of a list item:**

Click the item you wish to move > click Move Up or Move Down until the item is in the desired position.

### **Customizing Document Groups**

You can customize the list of document pages that appear when you choose Documents from the drop-down list in a file detail. This will assist you in managing documents saved to a file.

Select Files from the Configure menu > click the Documents tab > select the desired File Type from the drop-down list.

You can then proceed to add new or edit existing document group names on a per File Type basis.

### **Customizing Statutory Holidays**

You can select which holidays you wish to observe in the Statutory Holidays list in Amicus Attorney. Customize the list to contain exactly the holidays you want. Observed holidays are not considered business days.

Select Calendar from the Configure menu > click the Statutory Holidays tab > a list of holidays will appear.

**To change the details of a holiday:** Double-click the holiday to see its event details, make the desired changes and click OK.

**To add a holiday:** click New > Fill in the details in the Event Details window > click OK

**To remove a holiday:** Double-click the holiday > in the Event Details window click Delete.

Once you have finished customizing the holidays list, click OK

### **Customizing Shared Resources**

In the Group view of the Calendar module there are calendars for resources that users can book when scheduling a meeting.

Select Other from the Configure menu > click Shared Resources tab > make the desired changes to the list of resources

**To add or change the name of a resource:** Select the resource > then type the desired name



## YOUR LEGAL LAUGH

Your monthly dose of humor...



### 4. [FAQs - Frequently Asked Questions](#)

Our Customer Service Team provides answers to some common technical questions



#### Document Generation

**Question:** Why am I unable to see the 'Attach to File' or 'Add to Library' buttons in my MS Word application?  
(Applicable to version V)

**Cause:** The Team Member install was unable to copy the AATASKS macro file into the Word startup directory.



**Solution:** You can get these buttons to display by copying the `\Amicus50\Extras\aatasks.dot` into the `\Word\Startup` directory. It should have been copied there by the install, but if not, you can copy it manually.

This can be done by copying the `aatasks.dot` file into the Users Profile directory which will likely be:

`C:\winnt\profiles\yourname\application data\microsoft\word\startup` (for Windows NT) or `C:\Documents and Settings\yourname\application data\microsoft\word\startup` (for Windows XP, 2000, 2003).

For earlier versions of Windows the location can be determined by opening MS Word and from the Tools menu > Options > File Locations, look for Startup and it will display the location it is using.

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:**

**Cumbie Law Office Automation Consulting, Inc.**

Dunn, NC  
 (910) 891-4690  
[www.cumbieloac.com](http://www.cumbieloac.com)

Cumbie Law Office Automation Consulting offers both in-house and onsite training. Below are the dates for in-house training in the Dunn, NC facility. Training sessions include a maximum of 8 attendees per session. Please call Jashua at (910) 891-4690 to schedule.

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

Date	Time	Training Session	Cost	Location
February 19, 2004	12:00 pm – 6:00 pm	Amicus Attorney – Advanced User Training	\$249 / person	Dunn, NC
March 4, 2004	1:00 pm – 5:00 pm	Amicus Attorney – Administrator Training	\$199 / person	Dunn, NC
March 18, 2004	12:00 pm – 6:00 pm	Amicus Attorney – Advanced User Training	\$249 / person	Dunn, NC
April 8, 2004	1:00 pm – 5:00 pm	Amicus Attorney – Basic User Training	\$199 / person	Dunn, NC

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

**CD-ROM and DOWNLOADABLE TRAINING**

**2b1 Inc.**

San Francisco, CA  
 (415) 284-2221  
[www.2b1inc.com](http://www.2b1inc.com)

Amicus Attorney V Basic Training: PC Desktop training for the Amicus Attorney user. Easy-to use and easy-to-follow animation covers the most used features of Amicus Attorney V.

For more information, visit their web site:<http://www.2b1inc.com/c-training.htm>.

CD- ROM - Amicus Attorney V Basic Training

**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
Flexible Dates	9:00 am	eClass Training (Web Based training) -	Web based - You can take

	11:00 am 1:00 pm 3:00 pm or 5:00pm Weekend and late nights available.	<i>choose from:</i> Basic Application Training Advanced Application Training Application Troubleshooting Quick Start (New Clients Only)	eClasses directly from your own computer.
February 6, 2004	3:00 pm	<b>TRN201 Amicus Attorney - Basics</b> Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based
February 13, 2004	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
February 17, 2004	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
February 18, 2004	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
February 19, 2004	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
February 20, 2004	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
February 23, 2004	2:00 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

## 6. 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
March 25-27, 2004	<b>ABA Techshow</b> Visit us in Booths #513 & 515  For more information: <a href="http://www.techshow.com">www.techshow.com</a>	Sheraton Chicago Chicago, IL
May 17 – 20, 2004	<b>Association of Legal Administrators (ALA)</b> <b>23rd Annual Educational Conference and Exhibition</b>  For more information: <a href="http://www.alanet.org">www.alanet.org</a>	Pennsylvania Convention Center Philadelphia, Pennsylvania

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