Amicus Attorney News

The Official Newsletter of Amicus Attorney

March 2004
Volume 2
Issue 3

1. - ABA Techshow 2004

ABA Techshow 2004
Sheraton Chicago Hotel & Towers
Chicago, IL
March 25-27, 2004
www.techshow.com

The ABA Techshow, presented by the Law Practice Management Section of the America Bar Association, will be held from March 25-27, 2004 at the Sheraton Chicago Hotel and Towers in Chicago, Illinois. This premier legal technology conference brings together over 1,500 legal professionals from all across the world. Featuring top keynote speakers, specialized tracks presented by leading legal technology experts and a large exhibit hall where you can see the latest and greatest technology for the legal profession.

If you are planning on attending the event, come and **visit Amicus Attorney in booth #513 & #515** where we will be conducting demonstrations of NEW Amicus Attorney X.

NEW at the TECHSHOW THIS YEAR!
Techshow Training Institute

New this year is the Techshow Training Institute being held on Saturday March 27. The Amicus Attorney session - Learn How to Manage Your Practice and Improve Your Profitability with Amicus Attorney - will be from 1:00 – 2:30 pm. This practical, hands on session will be facilitated by top Amicus Attorney product experts and will be

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

Legal Laugh

Your monthly dose of humor...

a great opportunity to get all of your Amicus Attorney questions answered. This session is free to all ABA Techshow attendees.

For a FREE PASS to Exhibit Hall - Click Here!
(Once you have a pass, you'll be able to take part in the Training Institute sessions!)

We hope to see you there!

---

2. - Amicus Attorney V Basic Training (AVBT) on CD-ROM

Now Available!

top

Gavel & Gown Software Inc. is pleased to announce the availability of Amicus Attorney V Basic Training (AVBT) on our e-commerce site. AVBT is the first interactive multimedia training ever made for Amicus Attorney. This CD-ROM based end-user training program is designed for beginner Amicus Attorney users who want to get more out of their practice management. Developed by Amicus Attorney Premier Consultants 2B1 of San Francisco, CA, this easy-to-use tool is ideal for those looking for an alternative to classroom training options.

Click here to order.

---

3. - You Have to Try This!

Practical Tips and Tricks from Amicus Attorney Certified Consultants

top

6 Ways To Create Time Entries In Amicus Attorney

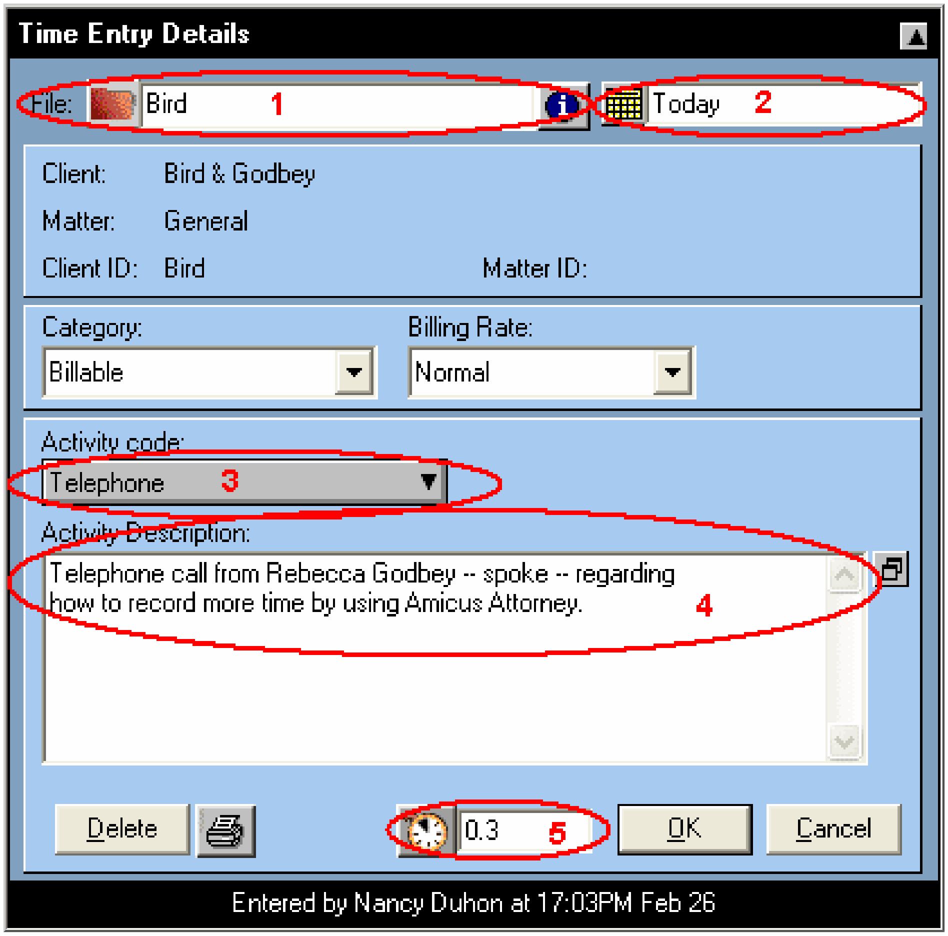
By Nancy Duhon, Esq

For some reason recording time entries for all of the work done in a day seems to be an elusive Shangri-la. You reach the end of the day exhausted, only to see a mere 5.4 hours accumulated on your Timesheet. Where did all the time go? Well, Amicus Attorney can help!

There are 6 ways for you to create a time entry in Amicus Attorney. The majority of these ways allow you to reuse/ recycle information you have already input. Knowing how to take full advantage of these methods can greatly improve your bottom line.

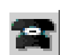
All time entries have some fields that must be filled in for the entry to be complete and accurate. The required elements for a complete time entry are as follows:

1. Which File is to be billed?
2. On what date was the work performed?
3. Which Activity Code should be used?
4. Provide a narrative description of the work performed.
5. Provide the amount of time spent performing work.



So, the trick is to use the method of entering a time entry which will bring forward as much of this information as possible.

#1 – From a Phone Call Record

If you acquire the habit of using the small black telephone icon , and fill out the record, you will have already provided all of the required information you need for the time entry. You need only click on the small button on the bottom right 

to have the time entry completely pre-filled for you, including the amount of time spent.

#2 – From an Appointment Record

Since Appointments happen on dates and at certain times, you can create a time entry from an Appointment that will copy over: the File to be billed, the description (a combination of the title and notes) and the amount of time spent (from the duration of the Appointment). When viewing the calendar, just click the small blue icon to the right of the particular event. If the specific event is already open, simply click the blue time entry button  at the bottom.

#3 – From a To Do Item

A To Do item is very similar in behavior to an Appointment, except here, you will need to provide the amount of time spent, since there is no way for Amicus Attorney to infer this information. Again look for the blue icon at the bottom of the event.

#4 – From an E-mail

Incoming and outgoing e-mail for a given day will appear on the right hand side of the Today Calendar view (click on the ToDo menu and choose the Communications option). Look for the small blue icon to denote an item that has not had a time entry created for it yet. Right-click on the item and choose Time Entry to bill for it.

#5 – Run a Timer

Starting the timer on an item will allow you to track the amount of time spent on the activity, then open the entry to fill in the remaining elements.

#6 – Key a New Entry from Scratch

While this method is my least favorite (because you have to provide all of the information other than today's date) it does work. And sometimes what you are doing just doesn't fit in with any of the previous methods.

You can win the case, write a masterful brief, and have a client that thinks you walk on water, but if you don't bill for it, you've worked for free. Be fair, complete and more accurate in your time keeping. Take advantage of the time capturing methods that your Amicus Attorney provides.

Compliments of:

Nancy Duhon, Esq.
Duhon Technology Solutions, LLC
Atlanta, GA
(404) 325-9779
duhon@duhon.biz
www.duhon.biz

Nancy Duhon, Esq. is the owner of Duhon Technology Solutions, LLC. She is a member of the Atlanta Bar Association, Georgia Bar Association, Louisiana State Bar Association and the American Bar Association. She has provided consulting services to law firms on using software to increase their productivity for over 10 years. She can be contacted at: 404-325-9779, Duhon@duhon.biz, or www.duhon.biz.

---

4. - Spotlight On ...

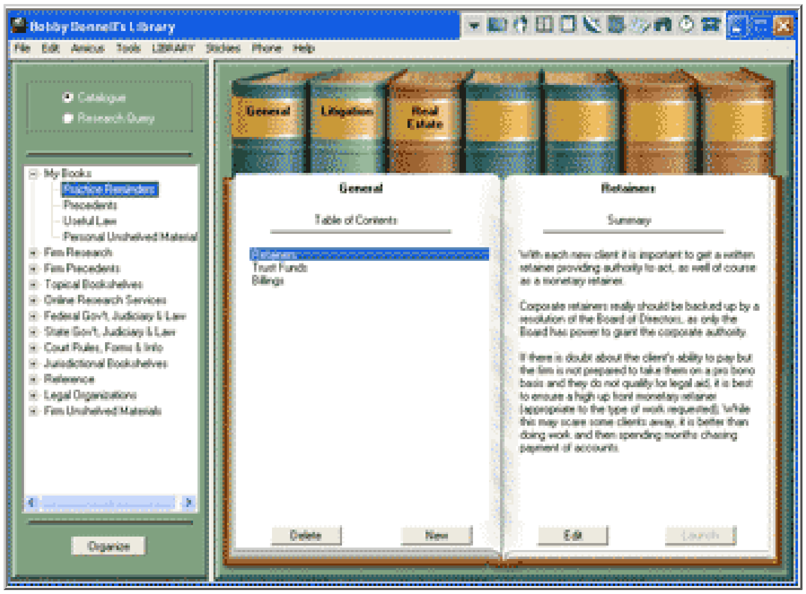
Highlighting a Feature of Amicus Attorney

top

The Library

The Library in Amicus Attorney is a unique knowledge management tool that integrates legal research into your client matter files and the balance of your practice management. Using the Library, you can keep all of your information resources, such as documents, memos, computer files as well as online services and Internet sites at your fingertips.

It can also act as a gateway to online legal research and other resources and allows you to track access to paid services. All Library material can be filtered and searched and the incredibly flexible organization structure can be tailored to your specific needs.



Setting Up The Library:

The Library is organized in a tree structure: Sections > Shelves > Books > Pages
Much like a regular library the concept is simple:

- Pages are stored within books
- books are kept on shelves
- shelves are organized into sections for easy reference

For example – you may have located a web page of research on accident statistics that you may need for a few of the upcoming Personal Injury cases you are working on.

Page = the link to the web page you would like to store in the Library
Book = Accident Statistics
Shelf = General Reference
Section = Personal Injury

When you then need to locate reference materials for your accident case you can easily find them.

Controlling the Structure of Your Library:

In the Amicus Attorney Library, Library pages can be designated as either firm or personal. Firm pages are those that the entire firm can view and have access to, personal pages are those available to individuals only.

In order to keep the firm Library organized and structured in a manner suitable to the firm's specific needs, Amicus distinguishes between two types team members – those with Librarian status and those without. The difference between the two is the amount of control they have over the Library's organization structure.

- Non-Librarians (regular team members)– only have full viewing and editing privileges for materials in their personal section.
- Librarians – can manage and change the content and structure of the Library. They can also edit and modify materials in their personal sections.

The firm structure and pages are available on a read only basis to the whole team while a personal section is available to the team member to whom it belongs.

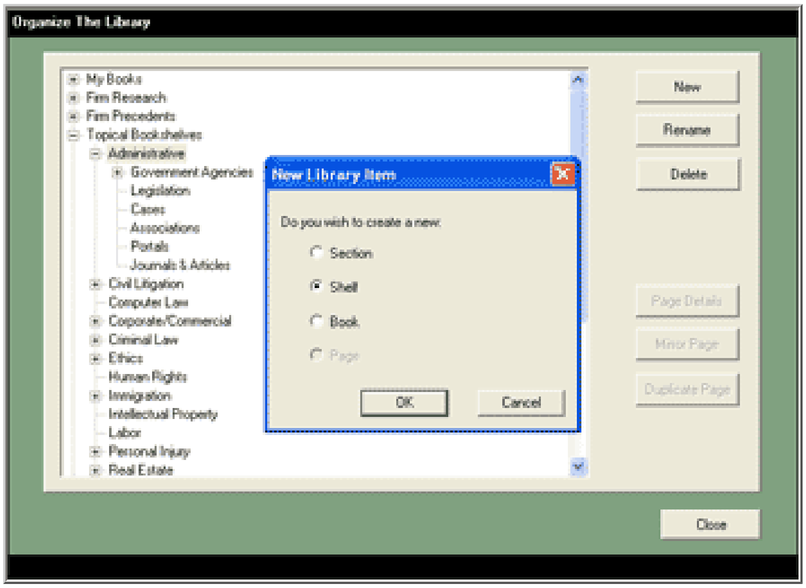
Organizing the Library:

To be able to access all of the resources from within the Library quickly and efficiently, the Library must be organized to suit you. You can set up and edit the Library structure of sections, shelves, books and pages to suit your firm.

When you first start using the Library the first screen you will see is the Catalogue View – main navigation area.

Click on the Organize button from within the Catalogue View. The screen that appears contains the following:

- On the right hand side – commands
- On the left hand side – the tree structure of the Library – all organization will take place here.



Creating Sections, Shelves and Books:

The NEW button on the right side of the Organizing the Library dialog will create a new section, shelf, book or page depending on which one you select.

By clicking the Rename button while an item is selected, you can edit the item's name. Once you have completed renaming the item, press enter and you can continue organizing the Library.

Books:
Books can be moved to other shelves by simply clicking and dragging them to the shelf you would like them placed in. The shelf that you have placed the books into will be highlighted to indicate that the book has been placed there. You can also change the order of the books within the shelf by dragging them to the point within a shelf where you want them to appear. When a shelf is highlighted, the book being dragged will be placed below the highlighted book.

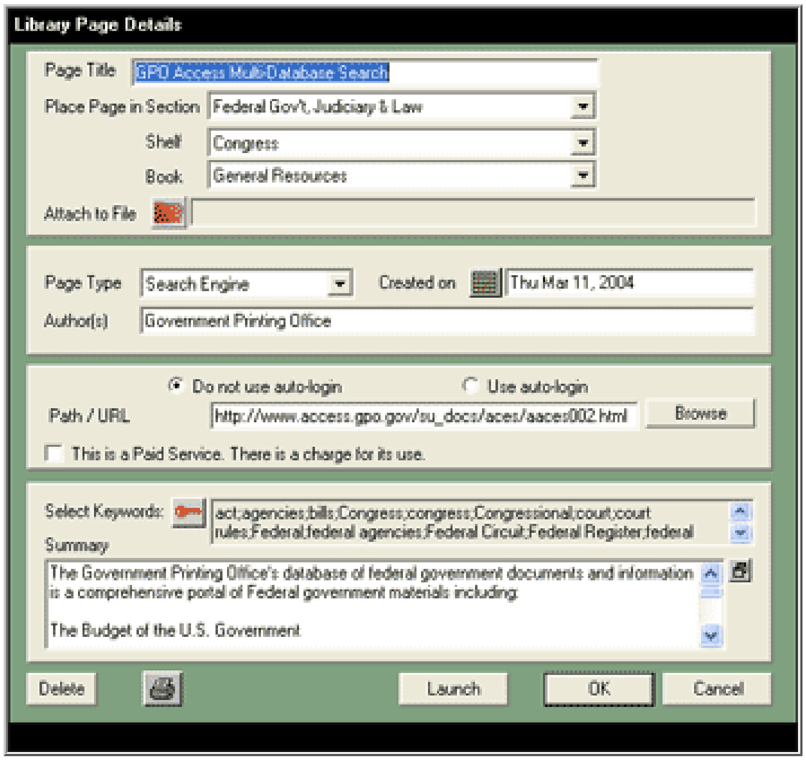
Shelves:
Shelves can also be reordered and moved in the same fashion as books. (see above for details)
For those without Librarian status (i.e. regular firm members), the Organizing the Library dialog will show all of the sections, but changes to the sections and structure cannot be made. This ensures that the Library maintains the structure as set up by the designated Firm Librarian.

Pages:
Pages can only be created within Books and are a unique item in the Library. They are different from sections, shelves and books in that they point to actual resources. Pages store all of the information regarding your research resources. Sections, shelves and books are the organizational tools used to keep your Library easy to use. While Library Pages can link to online sources of information, they can also be used to identify other types of resources such as scanned or word processing documents, images, or any other research that is housed internally by the firm.

You can create a new page in the Library by:

- Clicking on the New button in the Catalogue view
  Or
- Clicking the new button in the dialog of the Organize the Library view –select Page when prompted
  (There are other ways outside of the library to create new pages, such as the “Add to Library” button in your word processor toolbar and in Internet Explorer®.)

When a new page is created, the Library Page Details dialogue will be displayed and you can enter in all of the information about your new page including page name, location for the page and summary.



Location for the page – where do you want the page to appear?

Once a section is selected, the shelf pull-down menu will be activated and you can select the shelf within that section that will house the page. After the shelf is selected, the book pull-down menu will be activated and you can select the book that will store this page.

(Remember – Pages are stored in books, books are stored in shelves, shelves are organized into sections.)

Note: Regular team members (non-Librarians) can only add pages to their personal section and not to the firm sections. If a regular team member wants to add materials to the firm sections they can place a page in the firm’s Unshelved Materials book. Librarians can then take the page and place it in the appropriate location within the firm sections. If regular team members want to add a new page, the only options they will be given for storage of the page will be their personal section and firm Unshelved Materials.

Attaching pages to files:

Pages may be attached to a particular File in Amicus Attorney so that they will be accessible from the file whenever that file is opened.

Auto-Login:

You can use an auto-login template provided in Amicus to access one of the popular online research services.

- If you select “Do Not Use Auto-Login”, a “Path/URL” field appears where you can type in the URL or path for

the web page or file you wish to have associated with the page.
- If you select "Use Auto-Login", a drop down list appears in place of the path/URL field. Select the service that applies to the particular Library page. The Library will automatically provide the service with your login name and password any time you launch the resource associated with the Library page.

Paid Services:

You can track the use of paid services through the Library by enabling the "This is a Paid Service" checkbox. This indicates that accessing this page has a fee involved. Select the checkbox "This is a paid service. There is a charge for its use." Whenever a Paid Service is launched, you are prompted to assign a file to its use. This ensures you can charge the appropriate file for any costs incurred for accessing the service.

Page Summary:

You can type a short summary describing the resource to which the page points. This summary will be searched whenever a query is run and will aid in the search process. The summary will appear on the right-hand side of the open book in the Catalogue view when you select the page from the list within the particular book.

Once you are content with your page details, click Save.

The Library is an amazing organizational tool that everyone should take advantage of. Just remember that pages are the heart of the Library as they store all of the information regarding your research resources. The books, shelves and sections are what keep the Library organized and structured. Organize it to work exactly how you want it to and discover how powerful a tool it really is.

YOUR LEGAL LAUGH

Your monthly dose of humor...

Compliments of: www.legalhumor.com.

5. Legal Tips

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

top

If Your Wealth Was Based Solely On Your Client Relations Skills, Would You Be Rich Or Poor?

By Nancy Byerly Jones

This article, which was originally published in the Sept. 29, 2003 issue of Lawyers Weekly USA, has been reprinted with the permission of Lawyers Weekly USA, the national newspaper for small law firms. To subscribe, please visit www.lawyersweeklyusa.com or call (800) 451-9998.

Unless your clients are lawyers, they are most likely not legal experts (although many may think they are). All clients, however, are specialists when it comes to judging how they are being treated by their attorneys.

Clients who receive timely and competent legal services and are treated professionally and respectfully will come back in the future and they will recommend the firm to others. In a nutshell, when clients are treated as a firm's number one priority, the client list keeps growing in a positive direction as does the firm's success year after year.

Who Files Malpractice Claims?

When honest mistakes are made, properly treated clients rarely rush to file a formal malpractice suit or ethical grievance against their attorneys. They are, of course, not happy that mistakes were made, but they are usually willing to work toward resolution of the problem without seeking to publicly embarrass the attorney.

Disgruntled, poorly treated clients, on the other hand, are often the complainants behind malpractice claims and ethical grievances.

A disturbingly large number of the claims clients make against their attorneys arise not out of incompetent legal skills, but from poor communication skills on the part of attorneys. This is indicative of the on-going failure of attorneys and their employees to prioritize client relations appropriately. Such problems can be easily avoided by competent representation and treating clients courteously, professionally and respectfully.

Client Relations And Marketing

The way we and our partners, associates and staff treat our clients is directly related to the success of how we are marketing our firms. We may deny that we need to market ourselves and our firms, and we may denounce even the idea of marketing as unprofessional or unnecessary. Nevertheless, the manner in which we serve our clients does indeed create either a productive marketing tool for our firms or a negative marketing nightmare.

Marketing Starts At The Office

Marketing wears many hats and we hear it defined in a multitude of ways. It encompasses newspaper and magazine advertising, television ads, customer and client surveys and an endless imagination of gimmicks aimed at getting the attention of our potential clients. But, whatever we call it or however we define it, our marketing efforts should begin with a hard look at how we can better serve our current clients.

Our clients are our direct link to the huge market outside our office doors. Clients will be talking positively or negatively about us to their families, friends, neighbors and co-workers. So, even if you're from the school of thought that law firms shouldn't market themselves, I hope you will at least agree that the way we treat our clients will directly affect our reputations and place in the legal "market."

How Can We Better Serve Our Clients?

All attorneys can improve their client-relations skills and should be striving to do just that on an on-going basis. This rule of thumb applies to the oldest and greatest among us as much as it does to the novice attorney. And, we should be doing this because we truly care about how our clients are treated and not just for the marketing value gained from excellent client relations.

Does Your Office Have Signs Of These Danger Signals?

- Pile-up of unreturned telephone calls and/or unanswered email messages.
- Frequent client complaints.
- Accounts receivables that are too old and/or unreasonably high.
- An embarrassingly low number of client referrals.
- Unfriendly, discourteous or otherwise unprofessional staff.
- Unresolved disputes or bickering between firm employees.
- Chronic low morale problems.
- Frequent employee turnover.
- Keeping clients waiting too long for scheduled appointments.
- Failing to provide clear and detailed engagement agreements.
- Inability to "Just Say No!" in spite of growing work overload (which means the value of your "Yeses" is reduced).
- Poor prioritizing and little or no planning ahead.
- Working in a constant reactionary state of panic and crisis-mode.

Redundancy Can Be A Great Training Tool

A persistently heavy workload and hectic pace can result in our neglecting our client-relations efforts. While our neglect may be unintentional, it is nevertheless unfair and detrimental to our clients.

What can we do about it? We need to come up with reliable, frequent ways of reminding ourselves that striving for client service excellence should always be a top priority.

Redundancy is a good thing and helpful for all of us when it comes to keeping our client-relations skills up to par. It is good, for example, to regularly circulate "Client Relations Reminder Tips" to all employees via emails, office memos or at firm meetings.

One tip a day can be added to firm-wide memos or e-mails; employees can be asked to come to firm meetings prepared to share at least two ideas for improving how your office serves its clients; or a self-addressed, stamped postcard with one or two questions could be included in client correspondence or statements (e.g. "When you call or visit our office, are you always greeted in a friendly and professional manner?" or "How can we serve you better?").

If you agree that creating a list of client-relations tips is a good idea for your firm, you will find a sampling of reminders you might consider below:

1. Be on time for appointments and apologize if you are running late.
2. Return calls promptly.
3. Even though you may be rushed with a zillion to-do's on your plate, treat clients courteously and professionally.
4. Provide clear, detailed written engagement agreements.
5. Keep promises made or don't make them in the first place.
6. Avoid (like the plague) guaranteeing specific results in a client's case.
7. Listen, really listen to clients and their "stories" - we all feel better when we know we truly have someone's undivided attention.
8. Keep clients regularly informed and updated regarding the status of their case.
9. Ask for client feedback often and not just at the end of their case.
10. Treat every client as your best client and treat them as you would want to be treated if your roles were reversed.

Compliments of:

Nancy Byerly Jones, PLLC
Attorney / Certified Mediator / Legal & Business Management Consultant
(828) 898-4910
(828) 898-9600 (NBJ Consulting & Mediation)
nbj@nbjconsulting.com
www.nbjconsulting.com

Attorney and mediator Nancy Byerly Jones practices law, serves as a law office consultant and runs an attorney/staff retreat center in the northwestern mountains of North Carolina. For more information, please visit www.nbjconsulting.com, call (828) 898-4910, or send an e-mail to nbj@nbjconsulting.com.

6. FAQs - Frequently Asked Questions

Our Customer Service Team Provides Answers to Some Common Technical Questions

top

Attempting to generate a license request, but no text file is created and no error message appears.

Applicable to Versions: III IV V (Existing customers, in some rare cases, may experience this when adding new users)

Issue: When attempting to generate a License Request and choosing either the Fax or E-mail option, no text file is created and no error message appears.

Cause: In rare instances, the ATEAM.LDF file, located in the Team*0 folder, is copied with the "Read-Only" attribute activated in the ATEAM.LDF properties dialog.

Solution:

1. From Windows Explorer, double-click on the drive letter on which the Team*0 folder resides.
2. Select Tools > Find > Files or Folders.
3. In the Named field, type ATEAM.LDF and click Find Now.
4. Once the file is located, right-click on the ATEAM.LDF file and select Properties.
5. In the ATEAM.LDF Properties dialog, deactivate "Read-Only" attribute checkbox.
6. Generate a fresh License Request

7. Amicus Attorney Premier Consultants

Training, Events and More!

top

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

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
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

WEB BASED TRAINING

ProBill Law Firm Solutions

Boca Raton, FL
(800) 299-9177
www.probill.net

For more details, visit their web site.

Date	Time	Training Session	Location
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) - *choose from*: Basic Application Training Advanced Application Training Application Troubleshooting Quick Start (New Clients Only)	Web based - You can take eclasses directly from your own computer.
March 9, 2004	12:00 pm	**TRN201 Amicus Attorney - Basics** Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based
March 10, 2004	12:00 pm	**TRN202 Amicus Attorney - Advanced Calendar** 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
March 11, 2004	12:00 pm	**TRN204 Amicus Attorney - The Library** Organize your research materials for easy retrieval, i.e., word processing documents, spreadsheets, websites, paid services.	Web based

March 12, 2004	12:00 pm	**TRN203 Amicus Attorney - Document Assembly** Merge information from Amicus Attorney into your documents while linking the document to a File for future reference	Web based
March 15, 2004	12:00 pm	**TRN207 Amicus Attorney - ComCenter** 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
March 16, 2004	12:00 pm	**TRN205 Amicus Attorney - Timeslips Link** 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
March 19, 2004	12:00 pm	**TRN206 Amicus Attorney - QuickBooks Link** 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

8. - Events

Watch for Amicus Attorney at these events.

top

For a complete listing of National and Regional Events visit www.amicusattorney.com

2004

Date	Event	Location
March 25-27, 2004	**ABA Techshow** **Visit us in Booths #513 & 515** Techshow Training Institute Saturday March 27 - 1:00pm - 2:30pm Amicus Attorney session - Learn How To Manage Your Practice and Improve Your Profitability with Amicus Attorney For more information: www.techshow.com	Sheraton Chicago Chicago, IL
May 17 – 20, 2004	**Association of Legal Administrators (ALA)** **23rd Annual Eduational Conference and Exhibition** For more information: www.alanet.org	Pennsylvania Convention Center Philadelphia, Pennsylvania
June 17 – 20, 2004	**State Bar of Georgia Annual Meeting** **Best Law Firm SolutionsBest Law Firm Solutions (www.bestlawfirm.com)** **will have a booth at this annual event:** Thursday, June 17, 2004 – 12 pm – 6 pm. Friday, June 18, 2004 – 8 am – 6 pm Saturday, June 19, 2004 – 8 am – 1 pm	Portofino Bay Hotel Orlando, Florida