What's New in Amicus Attorney 2008 Small Firm Edition

This document describes the new features in Amicus Attorney 2008 Small Firm Edition.

IMPORTANT NOTE TO AMICUS ACCOUNTING USERS: Integration requires a compatible version of Amicus Accounting 2008. To check your version, choose About from the Help menu. *Hardware & Software Requirements* documents for both products are available from the Support > Technical Resource Guides section of our website, at www.amicusattorney.com.

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Amicus Attorney 2008 Small Firm Edition is a new product designed for smaller firms, as a partner product to Amicus Attorney Premium Edition. It provides tremendous value, includes many features previously only available in Amicus Attorney V+ Client/Server Edition, and can be run on a client/server database. However, it is not intended for larger firms, and does not include larger firm features found in earlier versions, namely: Access Profiles, Restrictions on Records, Remote Update, Team-Wide Reports, and the WORLDOX Link. Those features are available in Amicus Attorney Premium Edition.

Navigation Pane

Amicus Attorney 2008 Small Firm Edition has a new look! A Navigation Pane, shown in all main module views, provides easy access to any of the Amicus modules.

As you drag the "...." divider above the Office button downward, the wide buttons will change to icons shown across the bottom.

Note that the sequence of modules has been changed throughout Amicus, including on the Office Toolbar:

Tasks module

The new Tasks module provides a variety of views along with filters and functions specially designed for easy management of To Do's.

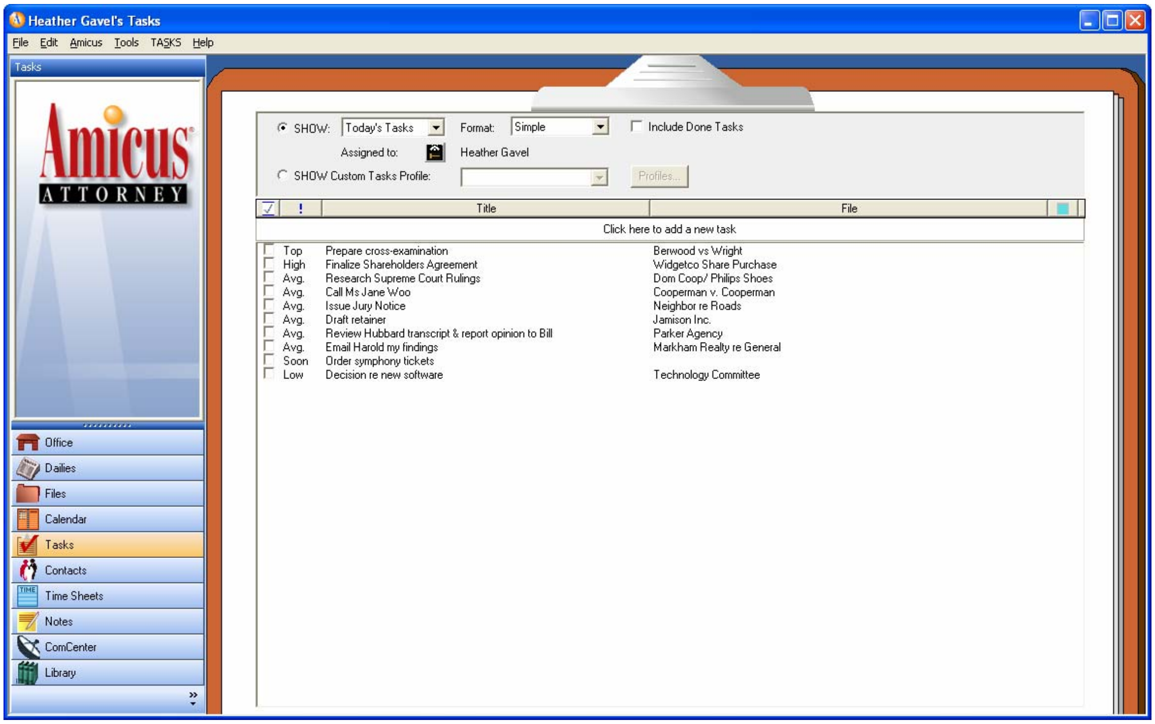
The Tasks list may be filtered in many useful ways, and displays To Do's for yourself and and/or others in either Simple or Detailed format. You may define customized views via Tasks Profiles. The list provides an editable row for quick and simple creation of new Tasks, without needing to open the Event Details window.

Viewing the Tasks list

To display the Tasks list:

- Click the Tasks button in the Navigation Pane or Office Toolbar. Or, open the Amicus menu and choose Tasks.

Above the list are several controls that determine which Tasks are listed and how they are shown.



Filtering the list to a standard view

For a standard view of the list, select the upper SHOW option, and then select the desired secondary options at the right:

- **Format**: Select either Simple or Detailed. The Detailed view adds the following information and controls to items in the list: Do button, Category column, and Time Entry icon.
- **Range of Tasks**: Select overdue Tasks, Tasks due today, or Tasks due within the next 7, 14, or 30 days.
- **Done Tasks**: Select this option to include Tasks that have been marked Done.
- **Assigned To:** Click the icon to select one or more Team Members. Tasks assigned to at least one of these Team Members will be shown.

Filtering the list to a custom view

For a custom view of the list, select this SHOW option, and then either select a previously defined and saved Custom Tasks Profile or click the Profile button to create a new Custom Tasks Profile. The particular Tasks Profile chosen determines whose Tasks are shown and how they are displayed.

Printing from the Tasks module

To print the full list:

1. In the Tasks module, use the filtering options above the list to show only the Tasks you want printed.
2. If necessary, click a column heading to sort the Tasks as desired.
3. From the Files menu, choose Print.
4. Click OK.

To print selected Tasks:

1. Select one or more Tasks in the list, right-click on the list, and choose Print in the menu that appears.

2 Click OK.

Sending a Task Status Inquiry

You can check on the status of a To Do assigned to others by using the Status Inquiry function. A Status Inquiry is an e-mail message to be sent to the Team Members assigned on a To Do. A message will open in your e-mail provider, addressed to those Team Members and with a subject of “Status Inquiry” followed by the Task’s Title.

To send a Status Inquiry for a Task:

1. In the Tasks module, right-click on a Task that has one or more other Team Members assigned. Then right-click on the list and choose Status Inquiry in the menu that appears. Or, choose Status Inquiry from the Tasks menu
   The new e-mail opens in your e-mail program.
2. Complete the e-mail message as desired and then send it.

Adding a Task

In the Tasks module, you may add a To Do quickly and simply:

1. Click in the blank row below the column headings, which initially shows the text "Click Here to Add New item".
2. Enter information in one or more fields. With the focus in one of the fields, press Enter.
   The To Do has now been added to the list. If you wish, you may now add another To Do.

Tips when entering a new To Do directly in the list:

- Defaults for the new row are based on your current Tasks view. For example, if you are currently viewing To Do’s for a specific File assigned to you and another Team Member, new To Do’s entered directly in the blank row will be associated with that File and assigned to you and that Team Member.
- Be sure to enter information for at least one field, such as Title.
- To go from one field to the next, you may press Tab. Press Shift+Tab to return to the previous field.

Alternatively, you may add a new To Do via the Event Details window:

1. From the Tasks menu, choose New To Do, or right-click in a blank area of the list and choose New in the menu that appears.
2. Fill in information in the Event Details window.
3. Click OK.

Editing or Deleting To Do's in the Tasks Module

- To open a To Do for editing, double-click the item in the list. Or right-click the item and choose Open from the menu that appears.
- To delete one or more To Do's, select them, right-click on the list, and choose Delete from the menu that appears.
- To mark a To Do as Done, click the Done checkbox.
- To create a Time Entry on an item, ensure that the Detailed Format of the list is shown and click the Time Entry icon.
- To perform the “Intelligent Assistance” action set up for an item, ensure that the Detailed Format of the list is shown and click the Do button.

Working with Custom Tasks Profiles

Custom Tasks Profiles enable you to define custom views of the Tasks list. For example, you might create a Profile that shows a list of Tasks with Deadlines, assigned to Files of Type "Commercial/Corporate", for the next 14 days, assigned to you and, optionally, another Team Member.

To display a custom view of the list:

1. From the Tasks list, select the lower SHOW option.
2. Select a pre-defined Custom Tasks Profile from the drop-down list, or click the Profile button to create a new Custom Tasks Profile.

To edit an existing Custom Tasks Profile:

1. Click the Profile button.
   The Custom Tasks Profiles selection dialog appears.
2. Select the desired Profile and click Edit.
   The Custom Tasks Profiles dialog appears, open to the Who tab.
3. Go through each of the tabs and make your changes, and click OK when you are finished.

To delete a Custom Tasks Profile:

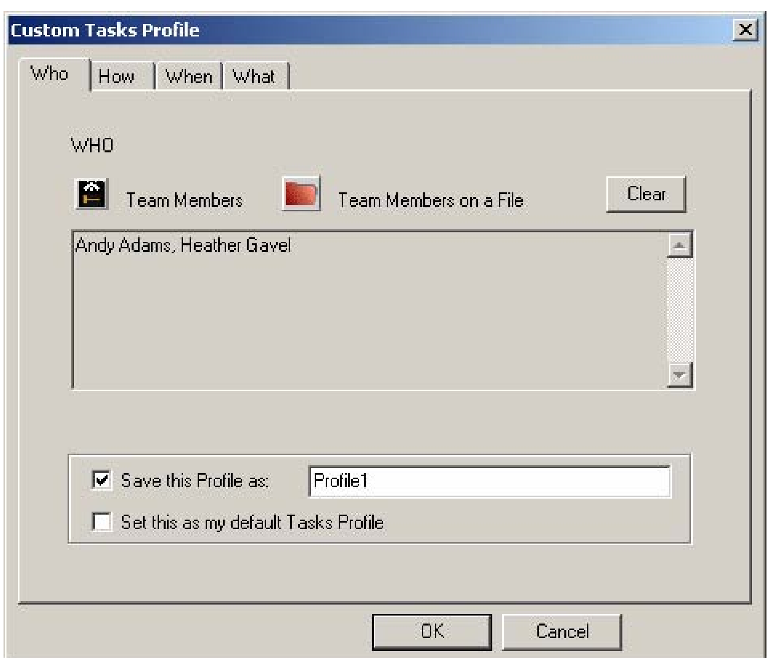
1. Click the Profile button.
   The Custom Tasks Profiles selection dialog appears.
2. Select the Profile you wish to delete, and click Delete.

Creating a Custom Tasks Profile

You may set the criteria for the display of the Tasks list by either using the basic settings above the list, or by creating a Custom Tasks Profile, which offers more options.

To create a Custom Tasks Profile:

1. Click the Profile button. The Custom Tasks Profiles selection dialog appears.
2. Click Edit. The Custom Tasks Profiles dialog appears, open to the Who tab.



3 From the **Who** tab you may set the following:

- Which To Do's to show, based on the Team Members assigned. Select the Team Members either through the Select Contacts button or the Select File button.

4 Click the **How** tab to set the following:

- How the list is formatted: Simple or Detailed. The Detailed Format adds the following information and controls to items in the list: Do button, Category column, and Time Entry icon.
- How the list is sorted: by File, Date and Priority, Deadline, or Category.

5 Click the **When** tab to set the following:

- Which To Do's to show, based on their Start Date. Specify dates relative to whenever the Profile is used: either Today or within the Next or Last number of specified days. Alternatively, specify a particular date range.

6 Click the **What** tab to set the following:

- Which kind of items to show: all Tasks, only overdue Tasks, only Milestone Tasks, only Tasks with Deadlines, or only Done Tasks.
- Which Category of Tasks to show.
- Which items to show, based on the File assigned: Files of a particular Type, or only a specific File. To include Closed Files, select the checkbox.

7 To save the Profile for later use, select the “Save this Tasks Profile as” checkbox, and, if desired, enter a Custom Tasks Profile name in the field provided. You do not need to save the Profile if you just want to apply it temporarily.

8 If saving the Profile for later use, you may set it as your default Custom Tasks Profile by selecting the appropriate checkbox.

9 Click OK in the Custom Tasks Profile dialog when you are finished creating your settings.

10 The Task list reappears, filtered and formatted according to your Profile.

Contact merge

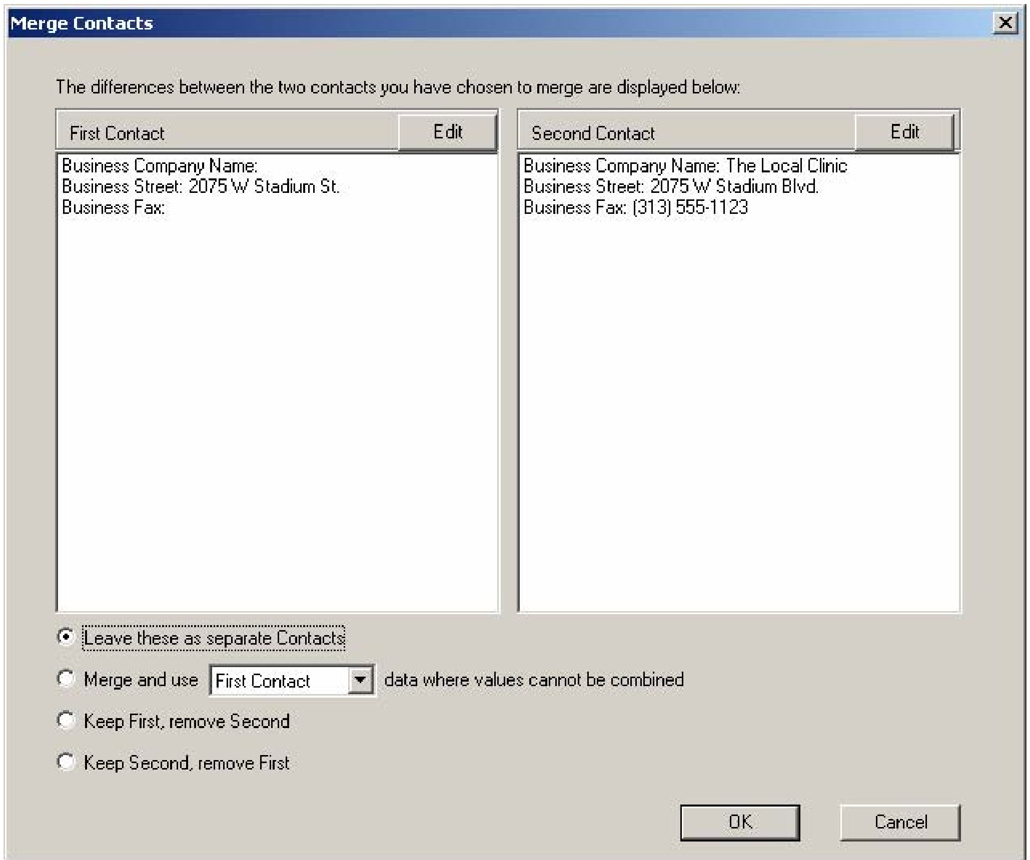
You might find from time to time that more than one Contact record has been created for the same person. Team Members can now combine the information from two Contact records into one directly from their own Contacts Index. The ability to combine Contacts and eliminate duplicates was previously only available to Team Administrators.

To merge two Contacts:

1 In the Contacts Index, select two Contacts.

2 Right-click on the list and choose Merge Two Contacts from the menu that appears.

The Merge Contacts dialog shows the differences between the Contacts: any fields that differ are listed.



To view additional information about either Contact, or to edit a record, you may click the corresponding Edit button. The Contact Edit dialog appears. Click Cancel or OK when finished in the Contact Edit dialog.

3 Select a method of resolving the differences:

- Leave them as separate Contacts - do not merge.
- Merge them, using the information from either the first or second Contact (as selected) wherever values cannot be combined. For example, if the Position Job Title and Business Address data differ in the two Contacts, only the information from the selected Contact would be kept.
- Keep the first Contact and delete the second.
- Keep the second Contact and delete the first.

Merging the Contacts, or deleting one of them, causes all relationships, associations, and assignments to be merged, including: Notes, Files, Team Members, Contact Groups, Events, Communications, and Documents.

NOTE: If Amicus Attorney is integrated with Amicus Accounting and both Contacts have Client IDs assigned, this function will neither merge them nor delete one. To resolve duplicate Contacts, you will need to merge them manually.

4 Click OK to proceed as specified, or click Cancel to exit the dialog without merging.

Outlook and E-mail Integration enhancements

E-mail signatures

With E-mail Integration enabled, you can now have your pre-defined Amicus e-mail signature automatically included in new E-mails that you send directly from Amicus Attorney. For example, your signature could include your full name, position, company name, and other details. The content of this signature must first be your configured in Amicus, in the Preferences > ComCenter > E-mail – Signature tab. Note that the signature will not appear when replying to or forwarding E-mails.

Outlook access alert management

If using Outlook Synchronization or E-mail Integration in earlier releases of Amicus Attorney, an Outlook access alert commonly appeared periodically while you were working in Amicus Attorney or Outlook (Important Information item p1285). This condition is now handled automatically and the alert will no longer appear.

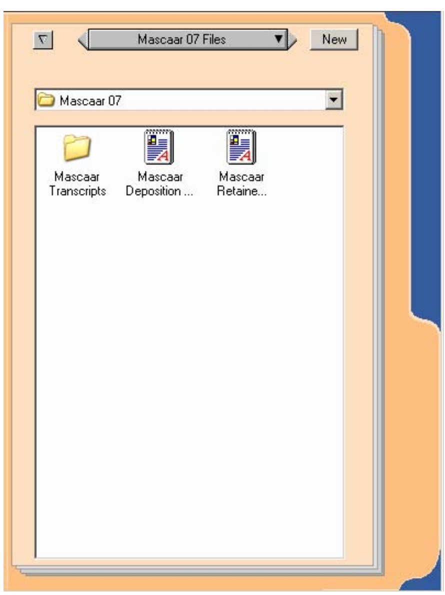
Outlook Contacts and Calendar Synchronization

The integration has been made generally more robust, particularly in the area of To Do's with deadlines and resynchronization.

Explorer view of Folder documents on Files

In earlier releases, you could attach a folder location to an Amicus File, resulting in the folder opening in a separate Windows Explorer window.

In Amicus Attorney 2008, each Amicus Document of type "Folder" is now listed in the Documents submenu at the top of the brad in the File Details. Upon selecting one of these items from the submenu, a Windows Explorer-based view of the folder appears embedded directly in the File Brad. Within this view you can take full advantage of Windows Explorer functionality: you may open the folder's files and subfolders, right-click to use Windows Explorer shortcut menu commands, and so on.

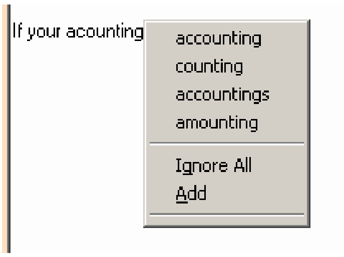


Automatic spell check

When typing in a text box field, such the File Summary field in File Details or a Notes field, your text can now be checked automatically.

To turn automatic spell checking (and the Auto-Text feature) on or off, go to Preferences > Office > Other and select or clear the “Check as I type and offer suggestions” option.

If the feature is on and you enter an unrecognized word (followed by a space and/or a punctuation mark), a pop-up menu appears, offering you the choice of using another spelling, ignoring that word throughout the remainder of your Amicus session, or adding the word to your spelling dictionary so that it will always be accepted. To leave the spelling of that single occurrence as is, simply press Enter or click elsewhere to close the menu.



Auto-Text

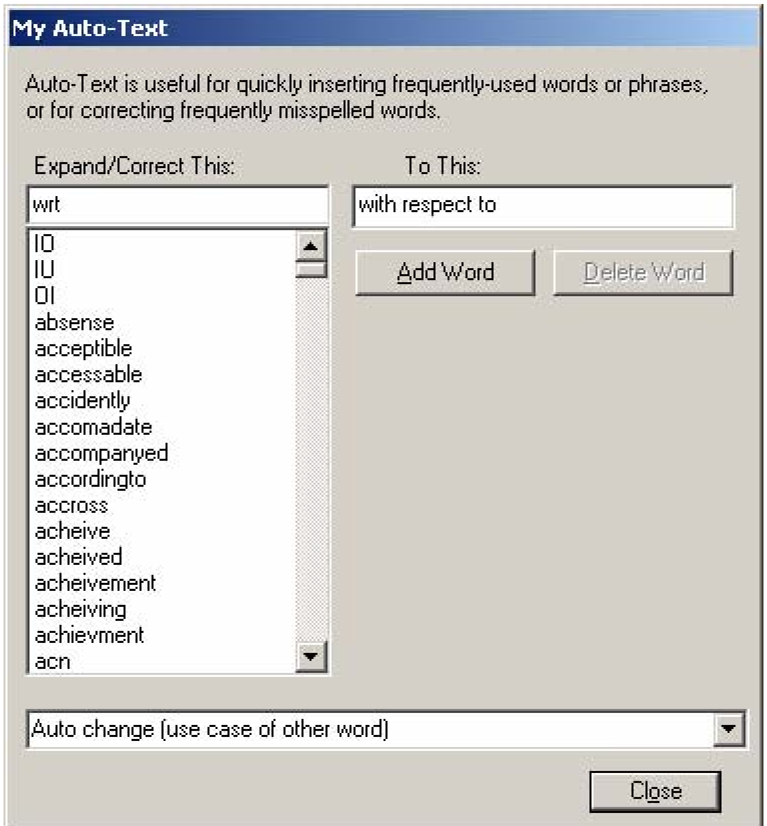
The Auto-Text feature is useful for quickly inserting frequently used words or phrases, or for correcting frequently misspelled words, in text box fields such as a Time Entry description or a Notes field. Amicus Attorney ships with a new dictionary containing many commonly misspelled words. If you enter a defined Auto-Text term (followed by a space and/or a punctuation mark), that text will be changed automatically as set in your preferences provided that automatic spell checking is turned on.

TIP: This feature is particularly helpful when entering common phrases in Time Entries—e.g. “tcw” for “telephone call with”.

To add an Auto-Text item to your spelling list:

1 Go to Preferences > Office > Other and ensure the “Check as I type and offer suggestions” option is selected.

2 Click the My Auto-Text button. The My Auto-Text dialog appears.



3 In the Expand/Correct This field, type the text you want checked for (e.g. “wrt”).

4 In the To This field, type the text you want the item changed to automatically (e.g. “with respect to”)
.

5 Select “Auto change (use case of other word)” in the list box.

6 Click Add Word.

To edit an Auto-Text item in your spelling list, select it in the list, edit the text, and click Add Word.

To delete an Auto-Text item from your spelling list, select it in the list and click Delete Word.

Other features

Additional Features for Those Upgrading from Amicus Small Firm—Those who upgrade from Amicus Small Firm (5.7 or 5.9) will now have access to the following additional features:

- Mirror (Additional) Backups
- Practice Packs
- PaperPort Link
- Juris Link
- Accounting Templates for Brief Accounting, Dexco, Juris, LegalPRO/SoloPro, Legalmaster, Legal Vision, Legal Vision (TBB), Canterbury Lighthouse, Manac ASA400, Manac PC, Quill, Solace Accounting, Solace Millennium, SOS Practice Manager, and Verdict

Milestone Events—“Critical” Events are now called “Milestone” Events.

New Online Help Format—All online helps have been converted to Microsoft HTML Help format for Vista compatibility.

Amicus Accounting 2008 Integration—The new “Change Client on Matter” and “Change Matter ID on Matter” features in Amicus Accounting are now supported by the integration. Making these changes in Amicus Accounting cause the corresponding changes to take place in Amicus Attorney. Note that Amicus Accounting 2008 is required for integration with Amicus Attorney 2008 Small Firm Edition.

Special Note re Amicus Assembly/GhostFill Integration—Amicus Assembly/GhostFill integration is no longer supported. This feature is not available in Amicus Attorney 2008 Small Firm Edition.

For further information, contact

Gavel & Gown Software Inc.
Phone: (800) 472-2289
(416) 977-6633
Fax: (416) 977-2563
www.amicusattorney.com
info@amicusattorney.com

August 2007