

Amicus Attorney Link Guide: Outlook Contacts & Calendar

Applies to:

- Amicus Attorney 2009/2008 Premium Edition
- Amicus Attorney 7 Premium Edition

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NOTE: *Outlook E-mail Integration is a separate feature, available in all editions of Amicus Attorney, that integrates your Outlook e-mail with the Communications module in Amicus. This feature has its own configuration settings. For details, please see the Amicus Attorney Online Help.*

About the Link

The Amicus Attorney-Outlook Contacts & Calendar Link is a bi-directional synchronization feature that aligns your Amicus Contacts, To Do's, and Appointments with your Microsoft® Outlook® Contacts, Tasks, and Appointments. You can configure the Link to exchange any combination of Contacts, To Do's/Tasks, and Appointments in either direction or in both directions.

The Amicus Attorney-Outlook Contacts & Calendar Link is an ideal vehicle for migrating your data into Amicus Attorney, for large firms where all members use Outlook but not all members use Amicus Attorney, or for firms where employees use Personal Digital Assistants (PDAs). Scenarios are provided in the following section that will give you an idea of how some firms have employed the feature.

This document provides details about how the Link handles Firm Member and People Group assignments, File associations, and custom field synchronizations. Configuration wizards guide the Amicus Administrator and users through the steps necessary for setting up and initializing the Link. Information is provided on resetting the Link, and ensuring that the feature runs smoothly.

IMPORTANT: If your firm will recognize no real benefit from using the Outlook Link, then we do not recommend that you enable this feature for Firm Members. It will increase your network traffic and the load on your Amicus Server due to the expanded number of transactions being processed through your Amicus database.

What you need

The Amicus Attorney-Outlook Contacts & Calendar Link requires:

- Installed on the Amicus Attorney Application Server:
 - Amicus Attorney 2009/2008 Premium Edition Server *or* Amicus Attorney 7 Premium Edition Server, accessible from the user workstations
- Installed on the workstations of users who wish to configure and use the Link:
 - Amicus Attorney 2009/2008 Premium Edition Workstation *or* Amicus Attorney 7 Premium Edition Workstation
 - Amicus Attorney-Outlook Contacts & Calendar Link— automatically installed during installation of Amicus Attorney Workstation
 - Microsoft Outlook— with or without an Exchange Server

For a list of supported Outlook versions, see the *Hardware & Software System Requirements* document, available from the Technical Resource Guides section of our website.

IMPORTANT: Ensure that the Windows Time Zone and Date/Time settings on all Workstations match those on the Amicus Server.

CAUTION: The use of third-party utilities with Outlook (such as an e-mail logger) could affect the proper functioning of the Link and might even cause data corruption.

Document Conventions

The following typographical conventions are used in the documentation:

- Text that you should enter exactly as printed is shown in Courier font, e.g. 7/28/2008.
- Keys that you press are shown in uppercase within angle brackets, e.g. <DELETE>.

Advantages of Using the Link

Scenario 1 – The Legal Department

This feature is ideal for large organizations that use Microsoft Outlook on a company-wide basis and have one or more individual departments that run Amicus Attorney. For example, a large retailer employs 350 people at their head office, 25 of whom are running Amicus Attorney in the Legal Department. The members of the Legal Department interact on a daily basis with various other departments within the organization. They have the advantage of utilizing the strong case-management tools provided by Amicus Attorney, while continuing to work with the company's Outlook environment—all without the necessity of having to enter data twice.

Scenario 2 –The Wireless Device

Regardless of the handheld device used, mobile professionals can merge their Contacts, Appointments, and Tasks with their Amicus data by employing the Link, provided that the device can synchronize with Outlook.

Jane is a busy litigation lawyer who uses Amicus Attorney to manage her practice. She always carries her HP iPAQ Pocket PC handheld with her. While out of town meeting with a client, John Smith, Jane uses her handheld to set up an Appointment for them to meet again to further discuss the details of his case. She enters the name of John's file in the Notes section. When Jane returns to the office the next day, she synchronizes her iPAQ with Outlook. Upon launching Amicus Attorney, an exchange runs automatically. Jane's Calendar in Amicus displays the Appointment she entered into her iPAQ, and it also appears on John's File.

Scenario 3 – Transitioning to Amicus Attorney

Those who adopt Amicus Attorney throughout their firm, and who previously relied on Microsoft Outlook for managing their Calendar and Contacts, soon find that the practice management features in Amicus far exceed those that are available in Outlook. Many have discovered that the Link is a valuable tool for migrating their data over to Amicus quickly and easily.

Monahan & White is a 15-member law firm that recently deployed Amicus to all staff, having found that they required a file-centric software solution to help run their practice. All lawyers, paralegals, and assistants in their organization have used Microsoft Outlook with Exchange for the past three years.

As part of their implementation strategy, they initially set the Link to Exchange Special mode. They ensured that Amicus was configured and mapped similar Contact groups, Contact custom fields, and Task priority values. They also mapped their Amicus Firm Members to their Outlook Address Book. After initializing the link to their accounting software, which created their Files and Clients in Amicus, each user entered the Short File Name, where applicable, in the Notes field of important Appointments and Tasks in their Outlook Calendar. On a rotating basis, each user enabled the Link at their Amicus workstation.

NOTE: *Attempting to run the initial synchronization at all workstations simultaneously is not recommended as this causes problems with the Exchange and Amicus Servers and may result in inconsistent results.*

Following the completion of the initialization by each Firm Member, Monahan & White has two options:

- The Administrator switches the Amicus Link configuration to Exchange Normal mode, to accommodate those exchanging their Amicus data via Outlook to their Windows Mobile or Pocket PC devices.
- The Administrator disables the Link. This may be based on one or more of the following reasons:
 - They found that their staff no longer had any reason to use the Outlook Calendar to schedule or view appointments. The Amicus Calendar offered them full functionality for booking Appointments for multiple Firm Members, allowed them to view Appointments and To Do's filtered by File, view only Milestone Events, and to find the next suitable time when the Executive Committee was available for a meeting.
 - Similarly their staff enjoyed creating and tracking To Do's in Amicus, linking them with not only Contacts, but more importantly Files. And, using the DO™ button saved valuable time.
 - Their smooth transition planning brought over all their contact information, including custom field information.
 - Disabling the synchronization decreased their start up time when launching Amicus, reduced the load on the Amicus Server, and eliminated any minor inconsistencies that may occur by reason of missing Start or Due dates, or dissimilar phone number formatting.

How the Link Works

When the Amicus Attorney–Outlook Link is first enabled by an individual user, an initialization process takes place. This process will compare the respective records contained in each application. Depending on the number of records you have, the process may take some time to complete.

Outlook record key

The Contacts, Appointments, and To Do's/Tasks being compared and exchanged between the two programs are linked together using unique identifiers. For all matching Outlook records, the Outlook record ID is stored in a user-defined field in Outlook, called the *AmicusExternalId* field, and is also stored internally in the Amicus database. The Link uses this linking ID to perform subsequent exchanges quickly and efficiently—only new records in either database are then matched using the matching criteria.

When exchanges occur

Exchanges occur:

- when you first enable the Link (the first exchange is called *initialization*)
- when you answer Yes to the prompt that appears each time you start Amicus Attorney, if you chose this option when setting up the Link
- automatically, according to the optional synchronization period you specified when setting up the Link
- when you choose Outlook > Perform Exchange on the Tools menu in Amicus
- when you choose Outlook > Process Deletions From Outlook on the Tools menu in Amicus

If Outlook is not already running when you do an exchange in Amicus, it will start automatically as a background process (not shown in your Windows Taskbar) and your usual Outlook startup prompts,

if any, will appear. During the exchange or deletion process, “Exchanging with Outlook” appears in the Amicus Status Bar

File Associations

Because there is no equivalent to Amicus Files in Outlook, records sent from Amicus to Outlook will assign the Short File Name of the associated File, if applicable, to the Notes field of Outlook records.

The Link extends your ability to make File associations while working in Outlook. You can enter the Short File Name in the Notes section of any Appointment or Task, in order to create an association with that File in Amicus, provided that you have entered the information in the proper format and a match is found in Amicus. The proper format is shown in the following example:

File: Smith v. Jones

A carriage return is required between multiple Files. The information is not case sensitive. A space is required between the “File:” and the Short File Name.

Contacts

People Groups/Contact Categories

When setting up their Link, each user can set all Contacts to be exchanged, or select People Groups to limit the scope of Contacts that will be exchanged.

All Contacts exchanged

If you add or change a Contact in Outlook with a Category that does not exist as a People Group in Amicus, that Category will not be added in Amicus as a new People Group. And, therefore, the Contact will not be assigned to a corresponding People Group in Amicus.

However, if you add or change a Contact in Amicus with a People Group that does not exist as a Category in Outlook, a matching Category will be added to your Outlook Category list. The new Category name will be followed by the note “(Not in Master Category List)”. In addition, the Contact will be assigned to this new Category in Outlook.

We recommend that you ensure that all People Groups in Amicus have a corresponding entry in your Outlook Master Category List.

Only Contacts assigned to selected People Groups exchanged

We recommend that you ensure that all Amicus People Groups you want exchanged have a corresponding entry in your Outlook Master Category List.

Managing Outlook Categories

Outlook Categories are stored locally, in the Windows Registry on each user’s workstation. For advice on how to migrate custom Categories, consult the appropriate “How to Migrate Custom Categories to Other Users” article in the Microsoft Knowledge Base. For example, for Outlook 2002 or 2003, see article 297405 at <http://support.microsoft.com/default.aspx?scid=KB;EN-US;Q297405&>

Contact Custom Fields

If you wish to synchronize information in Outlook Contact custom fields with Amicus Custom Fields, ensure that the Outlook fields exactly match the Amicus Custom Field Names and types.

The Outlook Contact custom fields (sometimes referred to as user-defined fields) can be configured through an Outlook Contact's dialog: choose the All Fields tab, click New, and specify Name and Type of the New Field.

When information is exchanged from Amicus to Outlook, if an Amicus Contact's Custom Field does not match the Name and Type of an Outlook Contact's custom field, the necessary custom field is created in Outlook and the field value is synchronized.

When information is exchanged from Outlook to Amicus, if the Outlook Contact's custom field does not match the Name and Type of an Amicus Contact's Custom Field, the field value is not synchronized.

NOTE: Outlook Custom Field Names cannot contain underscores, square brackets, or number signs. If an Amicus Custom Field has a Name containing any of these characters (e.g. *Date_of_Marriage*), the Outlook Contacts & Calendar Link will not synchronize that Field with Outlook.

The following Field Types are synchronized.

Amicus People Custom Field Types	Synchronization Direction	Outlook Contact Custom Field Types
Text	↔	Text
Checkbox	↔	Yes/No
Numeric	↔	Number
Currency	↔	Currency
Percent	↔	Percent
Date	↔	Date/Time (only the Date)
Path or URL	→	Text
E-mail	→	Text
Social Security Number	→	Text
Social Insurance Number	→	Text

Addresses and Communications information

The Amicus Administrator, when setting up the Link, maps Amicus and Outlook address and communication information:

- Addresses
- Phones and Faxes
- E-mail and Web

Contacts Address Book

If you configure the Link in Exchange Special mode, and you synchronize Contacts, configure each user's Outlook to check the Global Address List first when sending mail. This will help avoid the creation of duplicate or unnecessary Contacts in Amicus. To configure Outlook, choose Address Book on the Tools menu and choose "Global Address List" (rather than "Contacts") in the Show Names From The drop-down list box.

Events (Appointments and To Do's/Tasks)

When you create an Appointment or Task in Outlook and do an exchange, a corresponding Appointment or To Do is also created in Amicus Attorney if you have the Link enabled, and have appropriate preferences set in Amicus. Otherwise, the Event will remain only in the Outlook record.

When you create an Appointment or To Do in Amicus and do an exchange, a corresponding Outlook Appointment or To Do is created if you have the Link enabled and have appropriate preferences set.

If you configure the Link in Exchange Special mode, it is important that all Amicus Firm Members be mapped to Outlook mailboxes. For more information, see “Mapping Firm Members” on page 15.

Repeating Events

We recommend that you always set the “Schedule It Anyway” rule for repeating Events in Amicus. Amicus and Outlook repeating patterns correspond except for the weekend/holiday rules—Amicus has rules for not scheduling occurrences on non-business days but Outlook does not. The “Move To Next Business Day” and “Move To Previous Business Day” options in Amicus are not supported in Outlook. For example, if a weekly Appointment set for Fridays falls on a vacation day one week, and you have the Appointment set to “Move To Previous Business Day”, then that week’s instance will be scheduled on Thursday in Amicus Attorney but will still be scheduled on Friday in Outlook. If you were to edit that Appointment instance in Outlook, it would then change back to Friday in Amicus as well (and be automatically reset to “Schedule It Anyway”).

Internally, Amicus and Outlook manage exceptions to repeating Events differently. For simplicity and reliability, Appointment exceptions are synchronized between Amicus and Outlook, but To Do exceptions are not.

Event Categories

If you add or change an Appointment or Task in Outlook with a Category that does not match an existing Amicus Category, that Category list item will not be added in Amicus. The Appointment or To Do will be assigned to the default Category set in your preferences in Amicus.

However, if you add or change an Appointment or To Do in Amicus with a Category that does not match an existing Outlook Category, a matching Category will be added to your Outlook Category list. The new Category name will be followed by the note: “(Not in Master Category List)”. In addition, the Outlook Appointment or To Do will be assigned to this new Category.

We recommend that you ensure that all Amicus Event Categories have a corresponding entry in your Outlook Master Category List.

Managing Outlook Categories

Outlook Categories are stored locally, in the Windows Registry on each user’s workstation. For advice on how to migrate custom categories, consult the appropriate “How to Migrate Custom Categories to Other Users” article in the Microsoft Knowledge Base. For Outlook 2002, see article 297405 at <http://support.microsoft.com/default.aspx?scid=KB;EN-US;Q297405&>

The Amicus “Red Letter Day” Event Category is synchronized with the Outlook “All day event” option.

Priority of a Task/To Do

The Outlook Task Priority is synchronized with the Amicus To Do Priority, based on the Priority levels defined in Amicus.

From Amicus Priority	To Outlook Priority
Level 1, typically named Top	High
Level 2, typically named High	High
Level 3, typically named Avg	Normal
Level 4, typically named Soon	Low
Level 5, typically named Low	Low
Level 6, named Someday	Low

From Outlook Priority	To Amicus Priority
High	Level 2, typically named High
Normal	Level 3, typically named Avg
Low	Level 4, typically named Low

Shared Meetings and Tasks

- The exchange of collaborative meeting and task requests is not supported.
- **If you are using Outlook collaboratively, and you create an Appointment or Task in Outlook and assign Required Attendees, Optional Attendees, or Resources,** each one is sent an e-mail request in Outlook. As you, and each assigned user who accepted the request, synchronizes, the appointment or task is created in that user's Amicus Attorney. No e-mail requests will be sent within Amicus to confirm the appointment or task. Afterward, in Amicus, you can change who is associated with the Appointment or To Do.
- **If you create an appointment or task in Amicus Attorney** and assign yourself as well as others to it, you are all scheduled immediately in Amicus Attorney. As each assigned user synchronizes, the appointment or task is created in their Outlook with only them assigned, and no e-mail requests will be sent within Outlook to confirm the appointment or task.
- **If you are using an Outlook shared calendar, and another user creates an appointment or task in your calendar,** when you synchronize, that appointment or task is created in your Amicus Attorney.

To Do/Task Start Dates and Deadline/Due Dates

An Amicus To Do must have a start Date but does not require a Deadline. An Outlook Task does not have to have a Start Date, but if it does, it must also have a Due Date.

- If you create a Task in Outlook without a Start Date, the Amicus To Do will be assigned the Date of the exchange.
- If you create a To Do in Amicus without a Deadline, the Outlook Task will be assigned "None" as the Start and Due Dates.

Past Events

If a non-Completed Task in Outlook has a date before today, then when the link is initialized (or reset), the To Do is given today's date in both Amicus and Outlook.

Personal Events

An Amicus Personal Event (that is, an Event with no associated Files) is exchanged in the same way as other Events.

Field Mapping between Amicus Attorney and Outlook

Below are lists of the Contact, Appointment, and To Do/Task fields that are exchanged between Amicus and Outlook.

Contacts

Amicus Contact Fields	Outlook Contact Fields
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Prefix	Title
Suffix	Suffix
Main Note	(Body)
Company Name	Company Name
Position	Job Title
People Groups	Categories
Addresses *	Addresses *
Communications *	Communications *
Custom Fields **	Custom Fields **

* Address and Communications fields are mapped as defined by your Amicus Administrator for the firm.

** Custom/User-Defined Fields are mapped according to field name and type.

Appointments

Amicus Appointment Fields	Outlook Appointment Fields
Title	Subject
(Start) Date and Time	Start (Date and) Time
To (Time)	End Time
Main Note	(Body)
Category	Categories
Location	Location
Red Letter Day	All Day Event
Repeat Type	Recurrence Type
Repeat Settings	Recurrence Settings
Firm Member Assignments *	Attendees (Required, Optional, Resources) *
Shared Resource Assignments *	Resource Assignments *

* Exchanged only if the Link is configured for Microsoft Exchange Special mode—for details, see “Specifying how your firm uses Outlook with Amicus” on page 12.

To Do's/Tasks

Amicus To Do Fields	Outlook Task Fields
Title	Subject
Date	Start Date
Deadline	Due Date
Priority	Priority
Done	Status: Completed
% Complete	Completion Status
Main Note	(Body)
Category	Categories
Red Letter Day	All Day Event
Repeat Type	Recurrence Type
Repeat Settings	Recurrence Settings
Exception Date	Exception Date
Firm Member Assignments *	Recipients *
Shared Resource Assignments *	Resources *

* Exchanged only if the Link is configured for Microsoft Exchange Special mode—for details, see “Specifying how your firm uses Outlook with Amicus” on page 12.

Administering the Link at the Firm level

Amicus Administrator checklist

The Amicus Administrator should complete the following steps:

- 1** Read this *Amicus Attorney-Outlook Contacts & Calendar Link Guide*.
- 2** Optionally, ensure that all Amicus Event Categories have a corresponding entry in the Outlook Master Category List. (See “Event Categories” on page 7.)
- 3** Optionally, ensure that all People Groups in Amicus Attorney have a corresponding entry in the Outlook Master Category List. (See “People Groups/Contact Categories” on page 5.)
- 4** At a workstation from which Outlook is available, go to the Firm Settings view of the Office module, open the Link - Outlook Contacts and Calendar view of the Firm Settings dialog, and click Configure to start the Amicus Attorney-Outlook Link Firm Configuration wizard. Select the Link method, based on the way the firm uses Outlook and Amicus. (See “Specifying how your firm uses Outlook” on page 12.)
- 5** Map all Addresses and Communication information you want exchanged when Contacts are synchronized.
- 6** *If you configured the Link in Exchange Special mode*, map every Amicus Firm Member and Shared Resource to a user or resource in the Outlook Global Address List. Do not omit any Firm Members or Shared Resources. Map even the Firm Members that do not intend to use the Link. (See “Mapping Firm Members” on page 15.)
- 7** Finish the Amicus Attorney-Outlook Link Firm Configuration wizard.
If you configure the Link in Exchange Special mode, you will set the Link Preferences and Field Mapping And Matching Criteria that will be automatically applied to all Firm Members. This helps ensure uniformity of data.
- 8** **IMPORTANT:** From the Server, back up the Amicus database before any Firm Members start initializing their Links.
- 9** Grant Firm Members Access rights to set up, enable, and initialize their Link in Amicus, from each workstation. For performance reasons, especially at a firm using Microsoft Exchange, we do not recommend that all Firm Members initialize their Links at the same time. Therefore, you should consider granting Access rights to Firm Members only one group at a time. (See “Ensuring that Firm Members have access rights” on page 16.)
- 10** *If the Link is configured in Exchange Special mode*, we recommend that initializations be completed as soon as possible, before the Link is either reconfigured in Exchange Normal mode or disabled firm-wide.

IMPORTANT: During this period, users who have enabled their Link should not create, modify, or delete any Appointments or Tasks/To-do’s that are assigned to multiple Firm Members. Otherwise, duplicate records or even loss of data may occur.

From Firm Settings, reconfigure the Link in Exchange Normal mode or disable it as soon as all Firm Members have initialized their Links.

- **To reconfigure the Link to Exchange Normal mode**, click Configure in the Link - Outlook Contacts and Calendar view of the Firm Settings dialog, and then select the Exchange Normal mode in the Link Configuration wizard.

Each Firm Member who wishes to use the Link on an ongoing basis may then, if desired, change their own Link preferences. Any Firm Members who do not need an ongoing exchange of items between Outlook and Amicus should disable their Link.

- **To disable the Link for the firm**, first ensure that every Firm Member has disabled the Link at their workstation . Then set the Security Profiles for all users to prevent their access to the Outlook Link – Calendar and Contacts preferences. (For more information on choosing to disable the Link, see “Scenario 3 – Transitioning to Amicus Attorney” on page 3.)

Configuring the Firm Settings

First, ensure that all folders in Windows Explorer are set to show file extensions.

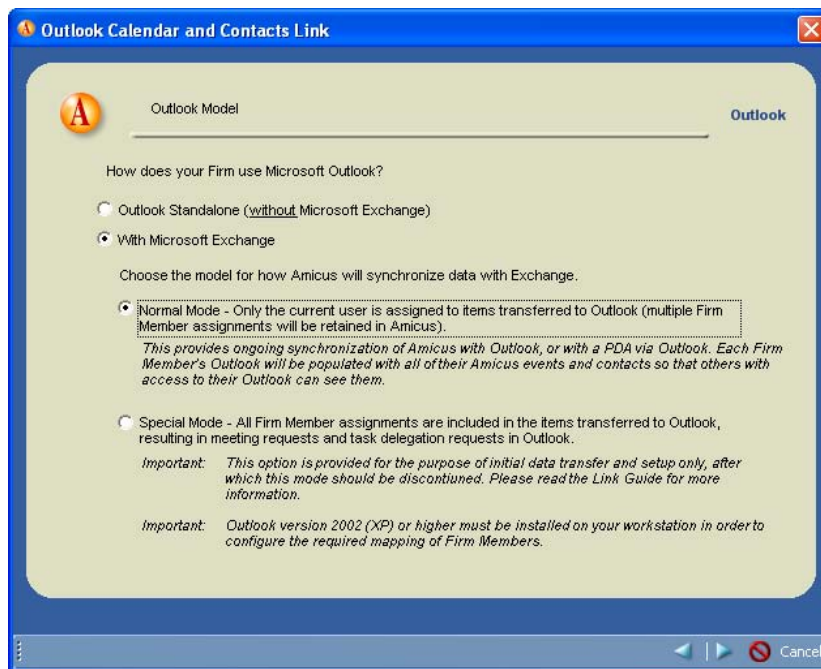
Next, to configure the Link, choose Firm Settings on the navigation list in the control panel in the Amicus Attorney Office module. Choose Outlook Link on the navigation list in the Firm Settings dialog that appears. The Link - Outlook Contacts and Calendar view appears.

Click Configure to start the Amicus Attorney-Outlook Link Firm Configuration wizard. The Welcome dialog of the wizard appears. Complete each of the dialogs in the wizard, as described in the following sections.

NOTE: During the configuration and initialization, Advanced Security for Outlook prompts might appear. Select the Allow Access action and the Always Perform This Action For This File option, and click OK.

Specifying how your firm uses Outlook with Amicus

After reading the introduction dialogs, use the Outlook Model dialog to configure the Link based on the way that your firm uses Outlook with Amicus.



Select one of the following options:

- **Outlook Standalone**—If your firm uses Microsoft Outlook without Microsoft Exchange (e.g., you are using POP3 configurations), then select this option. This mode works well for

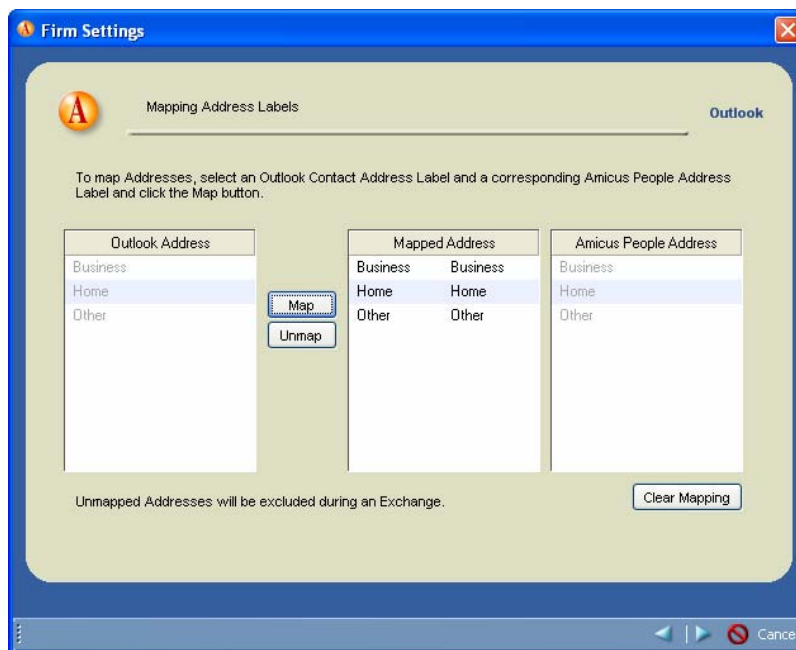
synchronizing Amicus with Outlook, or with a PDA via Outlook. It will also populate each Firm Member's Outlook with all of their Amicus Events and Contacts. Firm Members will set their own Link preferences.

- **Microsoft Exchange Normal mode**—If your firm uses Microsoft Exchange and you wish to use the Amicus Link on an ongoing basis, then select this option. This mode works well for synchronizing Amicus with Outlook, or with a PDA via Outlook. The current Firm Member's assignment will be included in items transferred to Outlook. (Multiple Firm Member assignments will be retained in Amicus but will not be transferred to Outlook.) Each Firm Member's Outlook will be populated with all of their Amicus Events and Contacts so that others with access to Outlook can see them. Firm Members will set their own Link preferences.
- **Microsoft Exchange Special mode**—If your firm uses Microsoft Exchange, and you want to perform a one-time import/export of data between Amicus and Outlook, including the transfer multiple Firm Member assignments to Outlook, then choose this mode. This will result in Outlook meeting requests and task delegation requests being created. You will need to map all Amicus Firm Members to corresponding names in the Outlook Global Address List, and set the Link preferences that are applied to all Firm Members.

IMPORTANT: Exchange Special mode is provided for purposes of initial data transfer and setup only, after which this mode should be discontinued. This is NOT a supported mode for ongoing use. Linking Amicus to this type of Exchange environment on a ongoing basis will cause issues due to limitations in the underlying APIs and the complexity of meeting requests and task delegations. These limitations are completely outside the control of Amicus. For information on meeting requests and how their improper use can lead to loss of data, see "Outlook meeting requests: Essential do's and don'ts" at <http://office.microsoft.com/en-us/assistance/HA011276781033.aspx>.

Mapping Address labels

After reading the Mapping introduction dialog, use the Mapping Address Labels dialog to map the Contact Address labels.



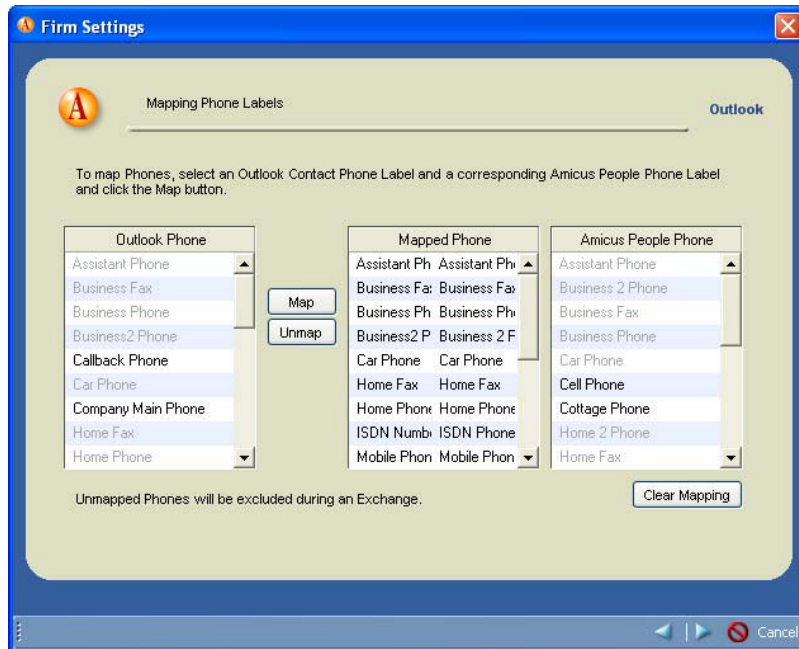
To map an Address label, select an Amicus “People” Address label in the list at the right, select an Outlook Address label in the list at the left, and click Map. The names of the mapped labels appear in the middle list.

NOTE: In Amicus Attorney 2009/2008 Premium Edition, the dialog includes an Auto button that enables you to quickly and automatically map matching items.

You can clear an Address label mapping by selecting both items and clicking Unmap. Or, you can clear all of the mapping by clicking Clear Mapping.

Mapping Phone and Fax labels

Use the Mapping Phone Labels dialog to map the Contact Phone number and Fax number labels.



To map a Phone or Fax label, select an Amicus item in the list at the right, select an Outlook item in the list at the left, and click Map. The names of the mapped labels appear in the middle list.

NOTE: In Amicus Attorney 2009/2008 Premium Edition, the dialog includes an Auto button that enables you to quickly and automatically map matching items.

Phone format

For an Amicus Phone to exchange properly with an Outlook Phone, the same format must be used.

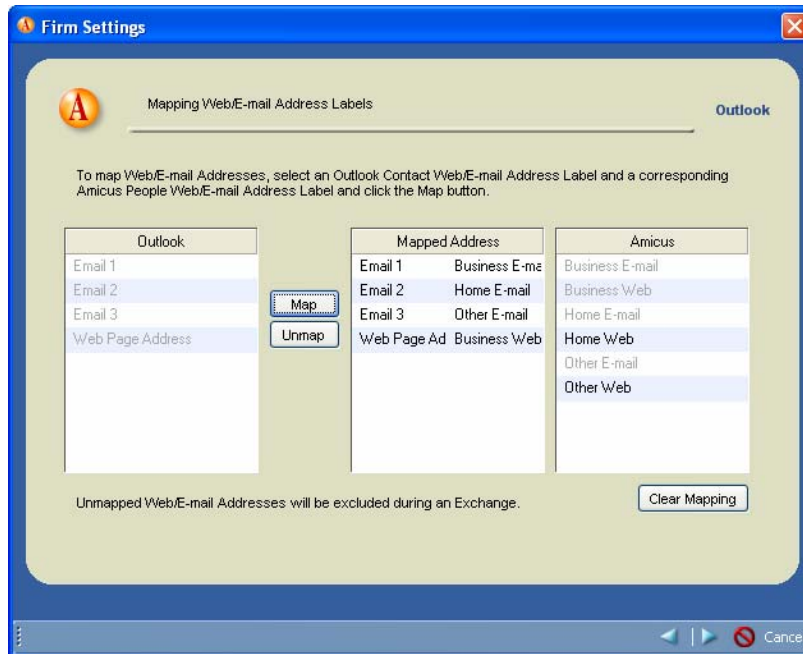
Amicus Phone information is divided into four fields: Country Code, Area Code, Local Number, and Extension. Outlook Phone information is in three fields: Country/Region, City/Area Code, and Local Number.

To ensure proper matching, enter a space and an “x” before any extension number when entering Phone information in the Local Number field in Outlook:

LocalNumber <SPACE> xExtension

Mapping E-mail and Web address labels

Use the Mapping Web E-mail Address Labels dialog to map the Contact E-mail addresses and Web address labels.



To map E-mail and Web Address labels, select an Amicus item in the list at the right, select an Outlook item in the list at the left, and click Map. The names of the mapped labels appear in the middle list.

NOTE: In Amicus Attorney 2009/2008 Premium Edition, the dialog includes an Auto button that enables you to quickly and automatically map matching items.

Click Next.

- *If you are configuring the Link in Exchange Special mode*, proceed to the next section to map Firm Members.
- Otherwise, you are finished the Link configuration for the firm. Proceed to “Ensuring that Firm Members have access rights” on page 16.

Mapping Firm Members

IMPORTANT: *If you configure the Link in Exchange Special mode, every Firm Member and Shared Resource must be mapped to an Outlook User or Resource. Do not omit any Firm Members or Shared Resources—map even the Firm Members who do not intend to use the Link. This mapping is required for the proper management of Outlook Appointment meeting requests and Outlook Task delegation notifications.*

Use the Mapping Firm Members dialog to map all Amicus Firm Members and Shared Resources to Outlook users and resources (from Outlook’s Global Address List). This dialog appears only if you configure the Link in Exchange Special mode.

To map a Firm Member/User or Shared Resource/Resource, select an Amicus item in the list at the right, select an Outlook item in the list at the left, and click Map. The names of the mapped items appear in the middle list.

NOTE: In Amicus Attorney 2009/2008 Premium Edition, the dialog includes an Auto button that enables you to quickly and automatically map matching items.

Click Next. Proceed to the next section to set Link preferences for all Firm Members.

Exchange Special mode: setting the Link preferences for all Firm Members

If you configured the Link in Exchange Special mode, you must now set Link preferences for all Firm Members. This helps ensure uniformity of data.

A Warning dialog appears. Click Next to continue to the dialogs for setting the following preferences:

- the **Link Preferences** dialogs (see Step 2 in the Configuring the Firm Member workstation section on page 17)
- the **Field Mapping and Matching Criteria** dialogs (see Step 3 in the same section).

Ensuring that Firm Members have access rights

In order for Firm Members to use the Link, the Amicus Administrator must grant individuals access rights to this feature. For performance reasons, especially at a firm using Microsoft Exchange, we do not recommend that all Firm Members initialize the Link at the same time. Therefore, you should consider granting access rights to Firm Members only a few at a time.

To verify whether Firm Members have been granted access rights:

- 1** Choose Security Profiles in the Administrator section of the navigation list in the Office module. The Security Profiles view appears.
- 2** In the Profile list box, select the Profile assigned to the Firm Members for whom you want to provide access, and click Edit at the bottom of the view. It is not necessary to grant these rights to all Firm Members—only those who wish to use the Link.
- 3** Choose the Office module in the Profile navigation list at the left, and then choose Actions. A list of settings appears. To enable access to the Outlook Link view, select the appropriate checkbox (or clear the checkbox to disable access).
- 4** Click Save.

NOTE: *If you configure the Link in Outlook Standalone or Exchange Normal mode, then once a Firm Member is granted access rights to use the Link, they must set their own Link preferences through the Link Configuration wizard (available from the Preferences view of the Office module in Amicus Attorney).*

Configuring the Firm Member workstation

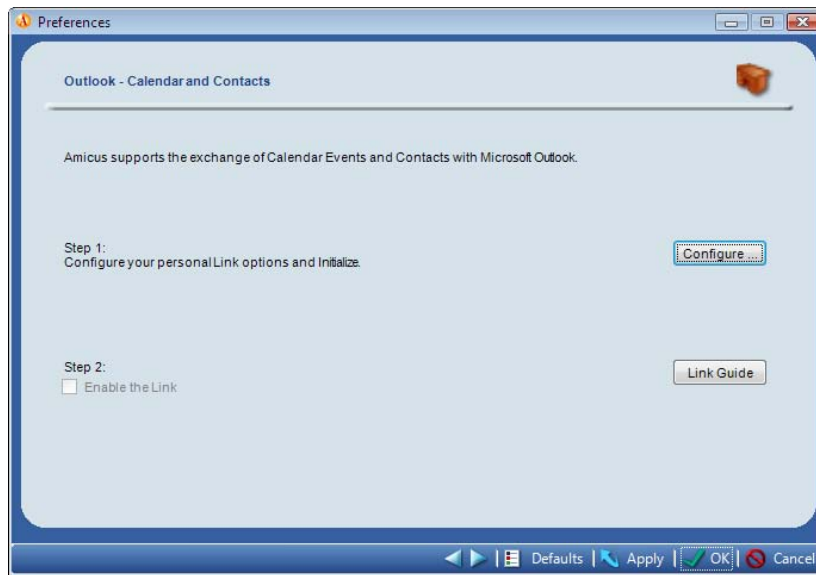
Firm Member checklist

Each Firm Member should complete the following steps before initializing their Link.

- 1** Read this *Amicus-Outlook Contacts & Calendar Link Guide*.
- 2** We recommend that you delete or archive any unnecessary Outlook records (or dearchive any desired records).
- 3** To avoid duplicates, ensure that matching records have the same information in the fields used for matching, e.g. Contact Names.
- 4** *If the Link is configured in Exchange Special mode*, make sure that Outlook is configured to check your Global Address List first when you send e-mail in Outlook. (See “Contacts Address Book” on page 6.)
- 5** Set your Link preferences through the Link Configuration wizard (available from the Preferences view of the Office module).
- 6** **IMPORTANT:** Back up your Outlook database before initializing your Link. See your Outlook Help or your System Administrator for details.
- 7** Start the Link initialization through the Link Configuration wizard.

Using the Firm Member Link Configuration wizard

To configure the Link, choose Preferences on the navigation list in the control panel in the Amicus Attorney Office module. Choose Links > Outlook Contacts & Calendar in the Preferences view that appears. The Outlook Contacts & Calendar Link view of the Preferences dialog appears.



Click **Configure** to start the Firm Member Amicus Attorney-Outlook Link Configuration wizard. The Welcome dialog of the wizard appears.

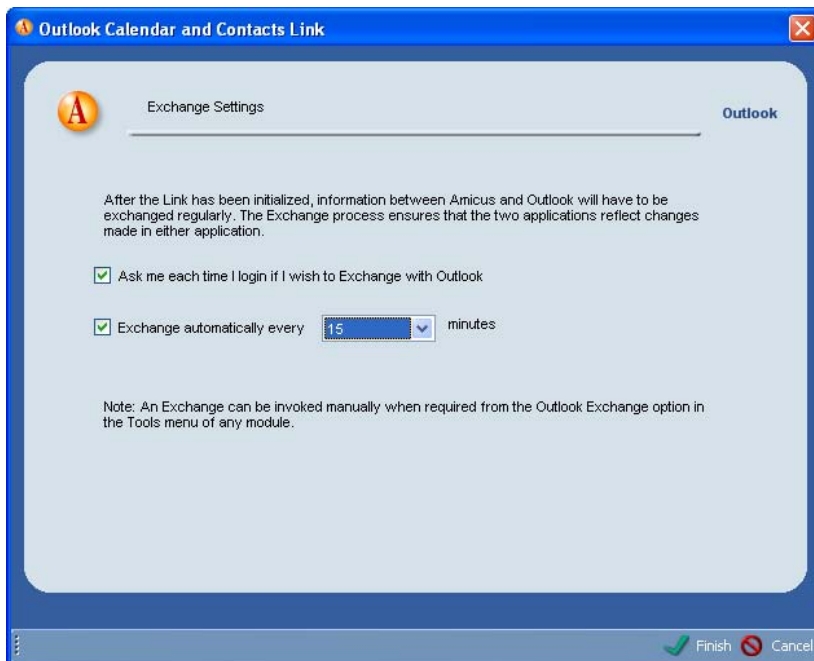


The current completion status of each step is shown at the right.

Then, complete each of the steps in the wizard dialogs, as described in the following sections.

Step 1 - Specify your basic exchange settings

In the Exchange Settings dialog, specify when you wish exchanges to occur.

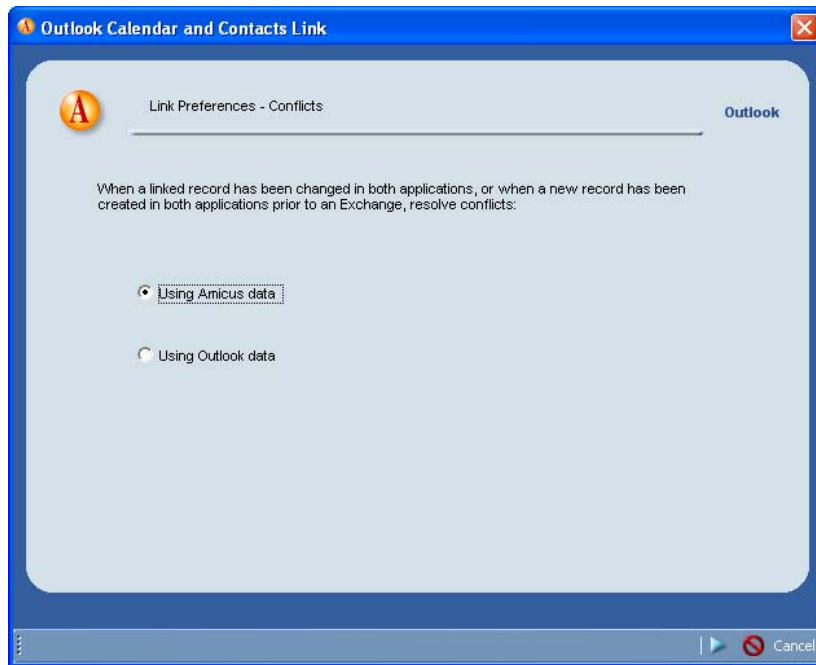


Choose whether you wish to be prompted to perform an exchange each time you log into Amicus Attorney. If you do not select this option, an exchange will not be done automatically at login.

Also choose whether an exchange should occur automatically on a regular basis and, if so, specify the number of minutes between exchanges (e.g. 60).

Step 2a - Specify your conflict preferences

In the Conflicts dialog, set the options for handling conflicts.

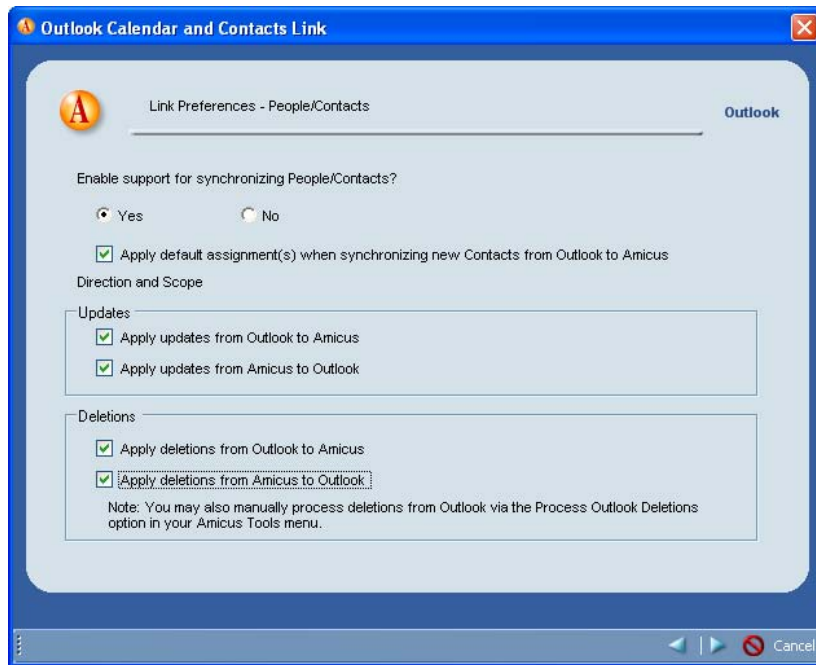


NOTE: *If the Link is configured in Exchange Special mode, then the Step 2 - Link Preferences is already set for all Firm Members to help ensure uniformity of data, and this step will be unavailable in the Firm Member Configuration Wizard.*

Set the Link to use either Amicus Attorney or Outlook data when conflicts arise. A conflict occurs if, since the last exchange, a linked record has been changed in both applications or a new record has been created in both applications.

Step 2b - Specify your People/Contacts preferences

In the first People/Contacts dialog, set the main People/Contact options.



General

Choose whether to include the exchange of Amicus Contacts and Outlook Contacts. If you clear this option, the other People/Contacts preferences will not be available.

Choose whether you want the Firm Members set in your People preferences to be automatically assigned to new Contact records created in Amicus Attorney through an exchange.

While exchanging Contacts from Outlook to Amicus, a duplicate check is done. If a match is found on an existing Firm Contact who is not already assigned to you, they will not be automatically added to your Amicus Contact list – you will remain unassigned to them. This occurrence is added to your Link Log. (You can assign yourself to this Contact by adding a new Contact with the same name and, in the match list that appears, select the Contact and choose the “Use Selected Contact” option.)

Updates

Choose the direction in which changes are applied:

- apply all Contact changes in Amicus Attorney to Outlook
- apply all Contact changes in Outlook to Amicus Attorney

If you wish to apply additions and changes from both applications, you should select both of these checkboxes.

Deletions

Choose the direction in which deletions are applied:

- Apply deletions from Amicus Attorney to Outlook.
- Apply deletions from Outlook to Amicus Attorney.

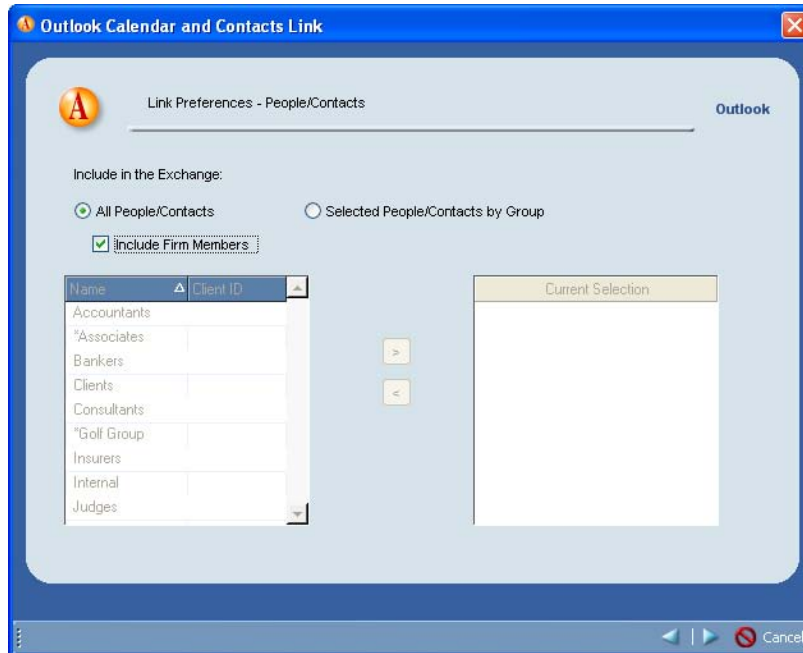
As a precaution, if more than ten deletions are detected in Outlook, none of the deletions will be processed in Amicus Attorney. A large number may indicate that the current state of your Outlook

records requires review. For example, changes in your default Outlook profile, or synchronizing your Outlook with other third-party products, could otherwise result in unwanted deletions in Amicus Attorney. If you wish to proceed with the deletions anyway, you can then choose Process Deletions From Outlook on your Amicus Office, Files, People, and Calendar menus.

If you wish to apply deletions from both Amicus Attorney and Outlook, you should select both of these checkboxes.

Scope

In the second People/Contacts dialog, specify whether you want all Contacts exchanged (regardless of People Group), or select which particular People Groups to include in the exchanges



Exchanging Firm Members to Outlook (*Premium Edition only*)

If using Amicus Attorney 2009/2008 Premium Edition, you may include Firm Members when exchanging Amicus People/Contacts to Outlook as Contacts. This is beneficial to those who use Outlook in a three-way configuration link with their handheld. The exchange of Firm Members is one way—from Amicus to Outlook. Firm Members cannot be added to or edited in Amicus via the Outlook Contacts & Calendar Link.

If you choose to exchange all Contacts, you may optionally include Firm Members as well.

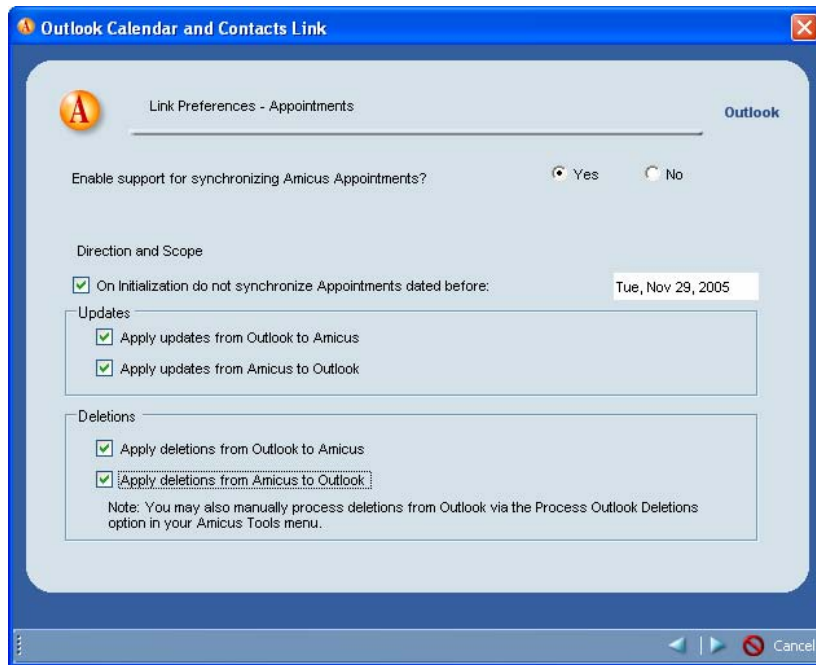
If you exchange only the People in selected Groups, you may select Contact Groups and/or Firm Groups. The People exchanged to Outlook will be the Firm Members in your selected Firm Groups, and the Contacts in your selected Contact Groups.

When you first select the option to exchange Firm Members, or select a Firm Group, you must reset the Link in order to exchange the Firm Members. Similarly, if you reselect the option after a period during which it has been off, you must reset the Link in order to exchange any Firm Members added or changed during that period.

If the option is on or you have selected any Firm Groups, then whenever you edit the Amicus record of a Firm Member who is configured for exchange, that Firm Member will be automatically exchanged again to Outlook, updating their information there.

Step 2c - Specify your Appointments preferences

In the Appointments dialog, set the main Appointments options.



General

Choose whether to include the exchange of Appointments. If you clear this option, the other Appointments preferences are not available.

Scope

Choose whether to prevent past Appointments from being exchanged during initialization. Then select or enter a cut-off date in the past. This can shorten the initialization processing time and keep old records from cluttering your new database. This option affects synchronization in both directions.

The past records will continue to be excluded from exchanges unless you later edit them in Outlook or Amicus Attorney and change their dates to occur after the cut-off date.

After initialization, changing the cut-off date has an effect only if you then reset the link (and reinitialize).

Updates

Choose the direction in which changes are applied:

- apply all Appointment changes in Amicus Attorney to Outlook
- apply all Appointment changes in Outlook to Amicus Attorney

If you wish to apply additions and changes from both applications, you should select both of these checkboxes.

Deletions

Choose the direction in which deletions are applied:

- Apply deletions from Amicus Attorney to Outlook.

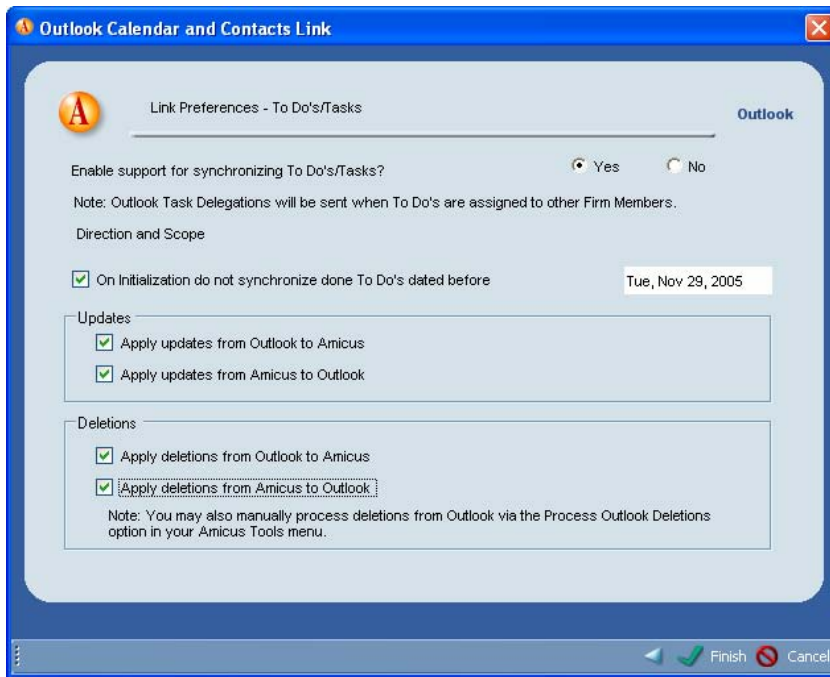
- Apply deletions from Outlook to Amicus Attorney.

For more information about deletions, see “Step 2b - Specify your People/Contacts preferences” on page 20.

If you wish to apply deletions from both Amicus Attorney and Outlook, you should select both of these checkboxes.

Step 2d - Specify your To Do's/Tasks preferences

In the To Do's/Tasks dialog, set the main To Do's/Tasks options.



General

Choose whether to include the exchange of To Do's/Tasks. If you clear this option, the other To Do's/Tasks preferences are not available.

Note that Outlook Task Delegations will be sent only if the Link has been configured for Microsoft Exchange Special mode—see Specifying how your firm uses Outlook with Amicus on page 12.

Scope

Choose whether or not you want to prevent old Done To Do's (and Completed Tasks) from being exchanged on initialization. Then select or enter a cut-off date. This can shorten the initialization processing time and keep old records from cluttering your new database. This option affects synchronization in both directions.

The old, ignored records will continue to be ignored in subsequent exchanges, even if you later edit them in Outlook or Amicus Attorney and change their dates.

After initialization, changing the cut-off date has an effect only if you then reset the link (and reinitialize).

Updates

Choose the direction in which changes are applied:

- apply all To Do's/Tasks changes in Amicus Attorney to Outlook
- apply all To Do's/Tasks changes in Outlook to Amicus Attorney

If you wish to apply additions and changes from both applications, you should select both of these checkboxes.

Deletions

Choose the direction in which deletions are applied:

- Apply deletions from Amicus Attorney to Outlook.
- Apply deletions from Outlook to Amicus Attorney.

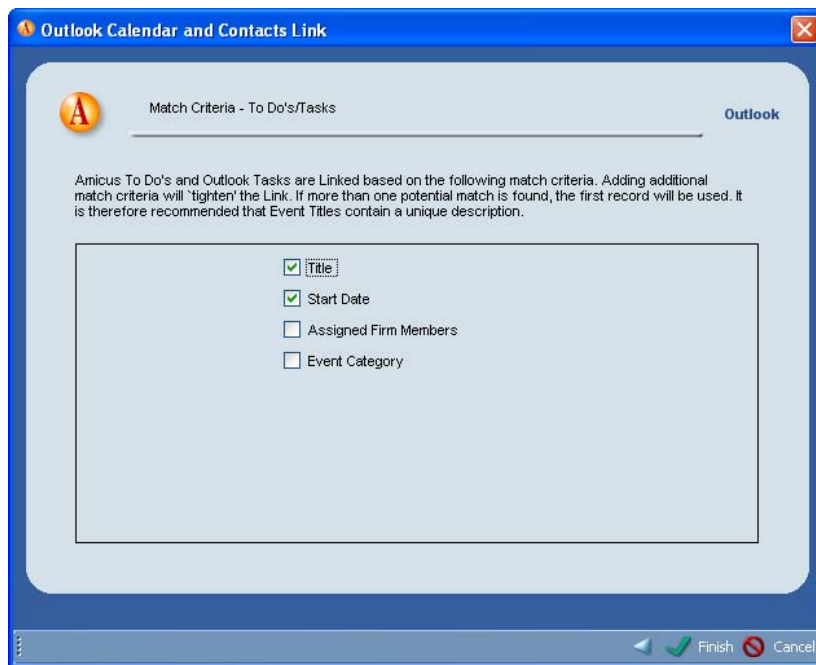
For more information about deletions, see “Step 2b - Specify your People/Contacts preferences” on page 20.

If you wish to apply deletions from both Amicus Attorney and Outlook, you should select both of these checkboxes.

When you have completed the Step 2 dialogs, click Finish. The Welcome dialog reappears.

Step 3 - Specify your match criteria

To set your matching criteria, click Step 3 in the Welcome dialog. Separate match criteria dialogs will appear for Contacts, Appointments, and To Do's/Tasks. For example, the To Do's/Tasks dialog looks like this:



NOTE: If the Link is configured in Exchange Special mode, then Step 3 – Field Mapping And Matching Criteria is already set for all Firm Members to help ensure uniformity of data, and this step will be unavailable in the Firm Member Configuration Wizard.

Select one or more of the fields to match on. An Amicus record will match a corresponding Outlook record only if all of the selected fields have the same content in both records. The more fields you select, the stricter the match.

If a record matches more than one record in the other application, the first record will be used in the exchange.

When you have completed the Step 3 dialogs, click Finish. The Welcome dialog reappears.

Initializing the Link

Outlook does not need to be running for exchanges to be effective, unless your Outlook configuration requires you to select a user profile or specify the connection type (i.e., Work Offline/Connect) each time you start Outlook. In these cases, Amicus Attorney will prompt you to run Outlook.

Before initializing the Link, you must first configure and enable the Link, from the Links > Outlook Contacts & Calendar Link view of the Preferences dialog in Amicus Attorney.

To initialize the Link, first click Configure in the Outlook Contacts & Calendar Link view. The Welcome dialog of the wizard appears.



You must have Steps 1, 2, and 3 completed. The current completion status of each step is shown at the right.

Click Step 4. The Initialization Checklist dialog appears.

Ensure that you have completed all appropriate steps, and then select the corresponding checkboxes:

- Review the *Amicus-Outlook Link Guide*
- Set your Link preferences and match criteria.
- *If the Link is configured in Exchange Special mode*, set your Outlook to check addresses in the Global Address List first when sending mail. (See “Contacts Address Book” on page 6.)
- Back up your Outlook items. (See your Outlook online help or Administrator for details.)
- Advise your Amicus Administrator that you are ready for Outlook initialization.

- Receive confirmation from your Amicus Administrator that you may begin the process.

NOTE: Initialization may take several minutes as records are created and synchronized on both sides. We recommend that you avoid running initialization during the period when Firm Daily Checks occur, which is shortly after midnight.

Click **Begin Initialization**. During the initialization process, “Exchanging with Outlook” appears in the Amicus Status Bar.

NOTE: During initialization, Advanced Security for Outlook prompts might appear. Select the **Allow Access** action and the **Always Perform This Action For This File** option, and click **OK**.

If initialization completes successfully, the **Link Log** appears, listing the start and end of the **Link import/export/exchange** steps.

If initialization fails, a prompt describing the step that failed appears before the **Link Log**—click **OK** and examine the **Log** for items that have the Label “Error”. Reasons may include unsupported characters, a corrupted Outlook .PST file, etc.

Initializing or re-initializing particular types of records

After initialization, you can edit your **Link** configuration to enable or disable the exchange of one or more types of records (**Contacts**, **Appointments**, or **To Do's/Tasks**), if necessary:

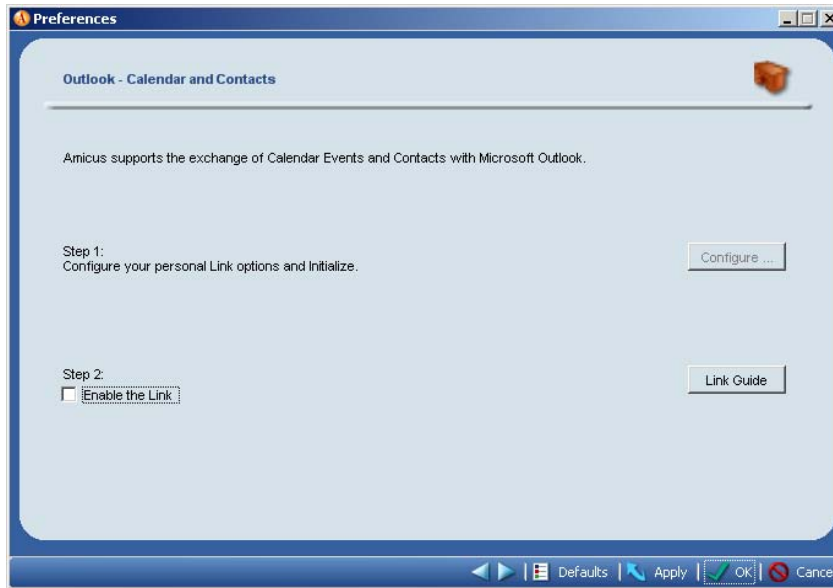
- If you enable a type of exchange that was previously enabled, then an initialization of those particular types of records will occur automatically when you next do an exchange. You do not need to reset the **Link** and do a full initialization.
- If you disable a type of exchange that was previously enabled, the links between those types of records will be automatically cleared as soon as you click **Finish** in the configuration dialog.

Using the Link after initialization

Enabling the Link at a workstation

After setting up and initializing the Link at your workstation, enable the Link by selecting the **Enable** checkbox in the Outlook Contacts & Calendar Link view of the Preferences dialog.

IMPORTANT: We strongly recommend that each Firm Member use the Link at only at one workstation. Attempting synchronization from more than one workstation, or with more than one Outlook account, may result in confusing results and a loss of data.



Exchanging information

You can choose to synchronize information in the following ways:

- **At Login**—Click Yes in the exchange prompt that appears whenever you log in to Amicus Attorney. (This optional prompt appears only if you have set it in the Link Configuration wizard.)
- **From the Tools menu**—Choose Outlook > Perform Exchange on the Tools menu in Amicus.

Each of the above options will prompt you if more than 10 deletions need to be done—use the Process Deletions command to continue. Choose Outlook > Process Deletions on the Tools menu in Amicus Attorney. Deletions are processed from Outlook and/or Amicus Attorney, as specified in your Link settings.

During the exchange or deletion process, “Exchanging with Outlook” appears in the Amicus Status Bar.

Disabling the Link

You can temporarily disable or re-enable the entire Link at any point after initialization by clearing or selecting the Enable option on this dialog. In addition, you can enable or disable the exchange of particular record types from Outlook to Amicus Attorney or vice versa by selecting or clearing the corresponding options in the Configuration wizard dialogs.

Troubleshooting

Outlook Link Log

To view a history of a user's Link initialization and exchange processes, including any errors encountered, choose Outlook > Show Log on the Tools menu in Amicus at their workstation.

Resetting the Link

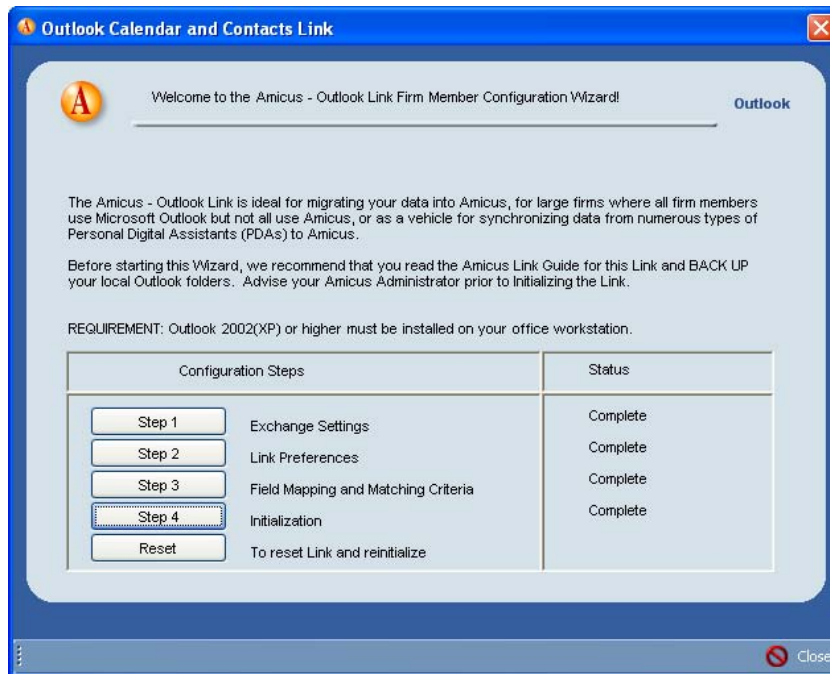
A Firm Member's Amicus and Outlook records might have become out of synchronization. Discrepancies may be due to some major change that has occurred in the Amicus database or the Outlook database. Such a situation may occur after restoring a backup in Amicus Attorney or after archiving/dearchiving your records in Outlook.

We recommend that you first try restarting both applications and try another exchange.

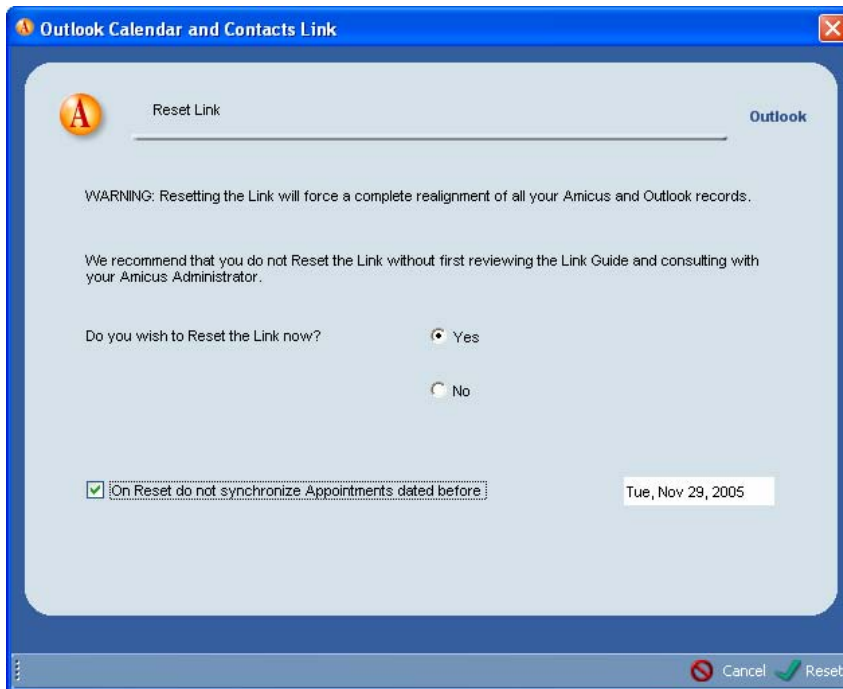
If this does not correct the discrepancies, then we recommend that you reset the Link. This will clear the links between the records in the two applications, and re-initialize the Link. This can be a lengthy process.

To reset the Link, first choose Preferences on the navigation list in the control panel in the Amicus Attorney Office module. Choose Links > Outlook Contacts & Calendar in the Preferences view that appears. The Outlook Contacts & Calendar Link view of the Preferences dialog appears.

Click Configure to launch the Amicus Attorney-Outlook Link Firm Member Configuration wizard. The Welcome dialog of the wizard appears.



Click Reset. The Reset Link dialog appears.



Select the Yes option.

For convenience, the cut-off date option for limiting the scope of Appointments exchanged is provided in this dialog as well as in the Step 2 - Appointments dialog. Select the option and change the date, if desired.

Click Finish. During the reinitialization process, “Exchanging with Outlook” appears in the Amicus Status Bar.

Other Important Information

- Ensure that the Windows Time Zone and Date/Time settings on all Workstations match those on the Amicus Server.
- *If the Link is configured in Exchange Special mode*, all Firm Members and Shared Resources in Amicus Attorney must be mapped to a user or resource in Outlook. Do not omit any Firm Members or Shared Resources. Map even the Firm Members that do not intend to use the Link.
- Outlook 2002 users should delete Outlook records using the <DELETE> key and not the <SHIFT + DELETE> key command (which deletes records completely, without sending them to the Deleted Items folder).
- If a user creates a Task in Outlook 2002 that contains a user-defined keywords field and assigns the Task to another user, the following error message appears when the user to whom the Task Request is assigned attempts to open it: “Can’t open this item. Could not complete the operation. One or more parameter values are not valid.” Also, the user cannot delete the Task from his or her Inbox.

Please note that the Link process does not involve keyword fields when exchanging Tasks. If this error message appears, then the user creating the Task may have added a user-defined keywords field to the Tasks form themselves.

For more information, see the "Error Opening Task Request with Custom Keywords Field" article in the Microsoft website for Outlook 2002 users:

<http://support.microsoft.com/kb/q291419/>

- *If the Link is configured in Exchange Special mode and users change a shared Event (i.e. one assigned to more than one Person), note the following. (This mode is NOT supported for ongoing use.)*
 - If the Author changes or deletes an Appointment in Outlook, we recommend that he or she send an automatic Outlook change/deletion notification to the other People on the Appointment. When People accept these notifications in Outlook, their Outlook schedules will be revised accordingly. It is also important that the Author perform an exchange immediately (before any of the other People) so that the Appointment will be changed/deleted properly in Amicus for all those People.
 - If the Author changes an Event in Amicus, or deletes it and answers yes to the prompt to delete it for all People, the Event is changed/deleted immediately in Amicus for all People. However, the Event will be changed/deleted in Outlook only for those People who perform an exchange. This creates duplicates.

Known Issue: If you have upgraded your version of Outlook (e.g. from 2000 to 2002) after the installation of Amicus Attorney, you will encounter problems when working with the Link. (For example, you might receive the following error message when attempting to send an e-mail from a Firm Member workstation: "Server threw an exception.")

Reinstall Amicus Attorney Workstation on your computer to ensure that the correct DLL files are present to match your version of Outlook.

Known Issue: Outlook 2002 users should not move large numbers of Contacts, Tasks, or Appointments from one folder to another at one time because then the records will not be synchronized with Amicus Attorney. Similarly, you should not delete large numbers of items at one time because the deletions will not be reflected in Amicus Attorney even if you choose OFFICE > Process Deletions from Outlook.

Microsoft has identified this issue as a problem in Outlook 2002. For more information, see the "ItemAdd Event Doesn't Fire in Some Scenarios" article in the Microsoft Knowledge Base at <http://support.microsoft.com/kb/q290653/>

You can, nevertheless, move a large number of Contacts, Tasks, or Appointments into a folder that is synchronized with Amicus Attorney if you shut down Amicus Attorney before moving the items, and restart it afterward.

Known Issue: In rare situations, each time you start an exchange, a dialog appears, stating that "A program is trying to access e-mail addresses that you have stored in Outlook. Do you want to allow this?" This is a security feature in Outlook. Activate the "Allow access for" checkbox. We recommend that you select 10 minutes from the drop-down provided, the maximum allowable time. Then click OK. You may be presented with this dialog more than once while your Contacts, Appointments, and To Do's/Tasks are being synchronized. You must click Yes each time the dialog appears in order to continue the synchronization process. This dialog may also appear later, while you are working in Amicus Attorney or Outlook and have added, modified, or deleted a record.

Known Issue: If Amicus Attorney has been uninstalled and reinstalled, the Amicus Attorney-Outlook deletion process might not function.

Known Issue: Depending on your Microsoft Exchange settings, an exchange might change the Amicus e-mail addresses of mapped Firm Members to a non-SMTP format.

For further information, contact



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