

What's New in Amicus Attorney Premium Edition 2011

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IMPORTANT NOTE TO AMICUS SMALL FIRM ACCOUNTING AND AMICUS MOBILE USERS: Integration requires a compatible version of Amicus Accounting 2011 or Amicus Mobile 2011, as appropriate. To check your version, choose About from the Help menu. *Hardware & Software Requirements* documents for the products are available from the Support > Technical Resource Guides section of our website.


For additional new features and resolved issues in Service Pack 1, see the *Update Release Notes for Amicus Attorney Premium Edition 2011 SP1*, available from the Support > Technical Resource Guides section of our website.

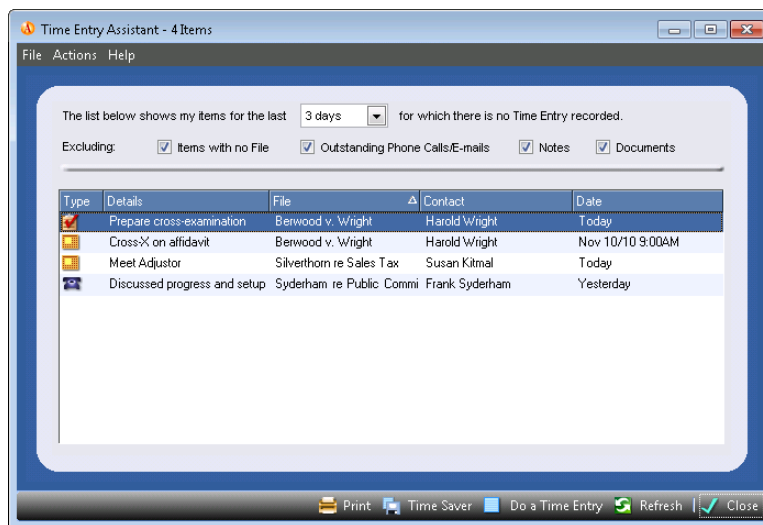
Recover, track, and bill your time faster

Amicus has always been known for helping lawyers “Do More, Bill More and Go Home Early”. Now that is more true than ever! The enhancements in 2011 help you recover “lost” time, record your time faster, and give you more flexibility for creating time on behalf of others.

New Time Entry Assistant

The new Time Entry Assistant makes it easy to ensure that Time Entries have been created for all relevant items. It quickly locates items for which Time Entries have not yet been recorded: Done To Do’s, Appointments, Phone Calls, E-mails, Notes, and Documents. Several methods are available for creating Time Entries for the items in your list, and for assigning File(s) to items without a File. You may limit the search by date range, and some additional exclusion options are available.

- 1 The Time Entry Assistant is available from the Tasks Toolbar  in the Time module, and from the Tools menu in any module. (This function is available to Guest Assistants in another Firm Member’s Office.)



- 2 Select a Date Range that is suitable for your purposes (items for the last x days).
- 3 Optionally, narrow your search by excluding items that may not be likely candidates for a Time Entry. You can choose to exclude one or more of the following:
 - Items that are not associated with any File
 - Outstanding Phone Calls and Saved E-mails
 - Notes
 - Documents (This refers to Document records designated as type File.)

Items associated with Closed Files are always excluded, as are Documents designated as type Folder, URL, or Other.

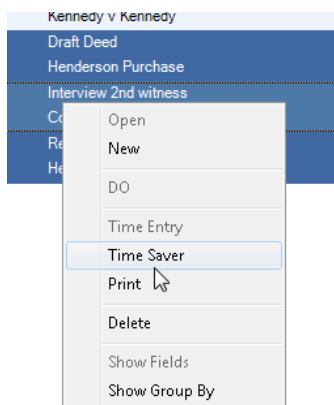
- 4 To sort the list, click any of the column headings. To refresh the list, click **Refresh**. To print the list, click **Print**.
- 5 To work with items in the list, select one or more items, right-click, and choose:
 - **Time Entry** (or click Do a Time Entry) to create and open Time Entry Details for each item.
 - **Time Saver** (or click Time Saver) to create Time Entries immediately, without opening Time Entry Details—for more information, see the following section.

- **Open** to open the details of the Appointment, To Do, Phone Call, etc.
- **Ignore Item** to permanently remove items from the list without creating Time Entries on them. This also hides the “Do a Time Entry” icon for these items in list views throughout Amicus.
- **Add to File** to assign items to File(s) immediately, without opening the item details. Select one or more Files in the Files Select dialog that appears and click OK.
- **Print** to print items.

All Time Entries created will be dated as of the date of the underlying item, and become available for review in the Time Sheets module.

Record your Time faster with Time Saver

Now you can create Time Entries for multiple items in a single click without opening each individual Time Entry. This feature is ideal for quickly recording a Time Entry for your daily activities.



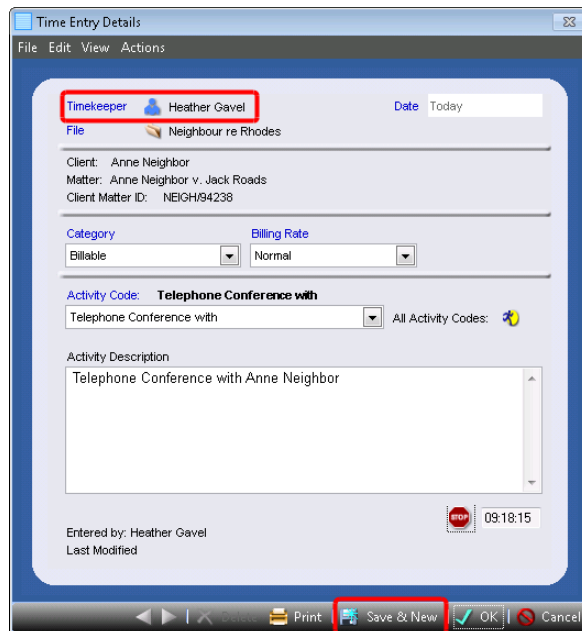
A new right-click context menu called **Time Saver** is available in many lists throughout Amicus, for Files, Events, Phone Calls, E-mails, and Documents.

Amicus will draft a Time Entry and fill in the details for each of the underlying items selected, including the applicable date and duration (such as Phone Call duration). Those items are then available in your Time Sheets module for review, and editing where necessary, before posting to your accounting system.

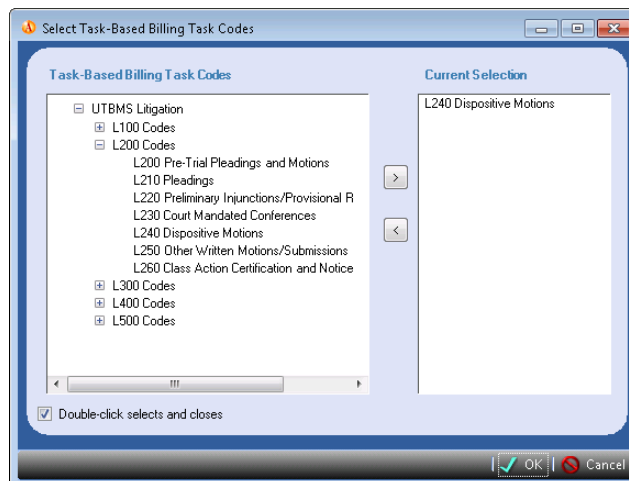
You can even take advantage of this same great workflow when you use Time Saver in conjunction with the new Time Entry Assistant.

Time Entry improvements

When you open Time Entry Details, you'll notice a few new options and improved workflow:



- **Select a Timekeeper**—When creating or editing a Time Entry, users may now assign a Timekeeper—themselves or any other selected Timekeeper. The Billing Rates and Rate Values available in the Time Entry are directly related to the assigned Timekeeper.
- **Faster Task-Based Code selection**—Improved workflow means fewer mouse-clicks when creating Time Entries for Task-Based Billing Files.
 - The Task Code selector dialog is now automatically filtered to match the Code Set on the File.
 - Double-clicking an item will automatically select and close the dialog.



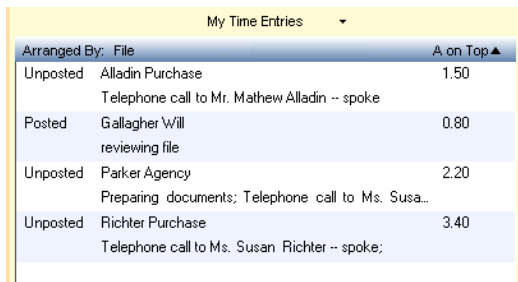
- **Save & New button**—A Save & New button is now provided on the toolbar so that you may, with a single click, save the Time Entry and open a new one.

New security option for unposting time

Amicus Administrators can now exercise more control over the use of the Unpost Time Entry function. Permission to Unpost Time Entries is now controlled by a new Security Profile option (under Time > Action).

Viewing Time Entries from the Calendar Day view

For convenience when viewing your schedule in the Calendar Day view, a list of all your Time Entries for that day is available, including both unposted and posted items. Simply choose to view **My Time Entries** in the right-hand section of the Day view.

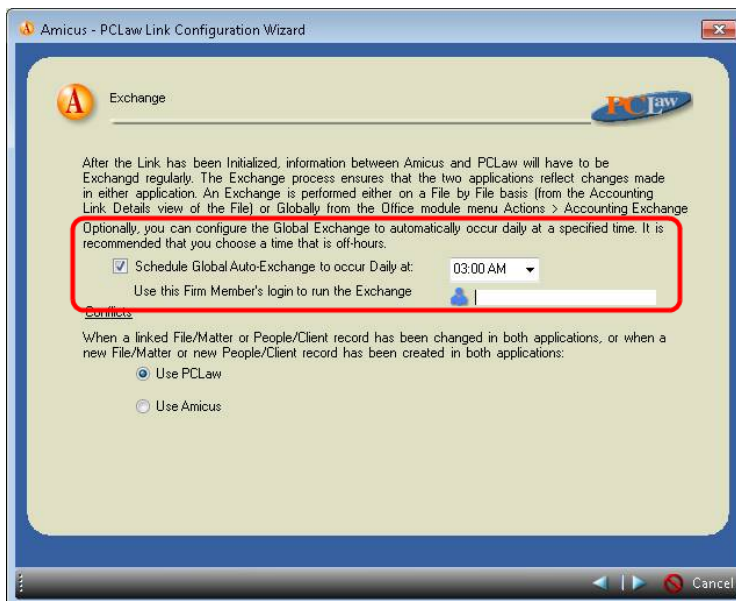


My Time Entries		
Arranged By:	File	A on Top ▲
Unposted	Alladin Purchase	1.50
	Telephone call to Mr. Mathew Alladin -- spoke	
Posted	Gallagher Will reviewing file	0.80
Unposted	Parker Agency	2.20
	Preparing documents; Telephone call to Ms. Susa...	
Unposted	Richter Purchase	3.40
	Telephone call to Ms. Susan Richter -- spoke;	

Scheduling Global Auto-Exchange with your Accounting Link

For those using the dynamic accounting link with PCLaw, QuickBooks, or Timeslips, you can now conveniently configure a Global Exchange to automatically occur daily at a specified time. A Global Exchange involves all Files and Contacts added or modified since the last exchange in either Amicus or the accounting application.

This new option is available in the Exchange dialog in Step 2 of the Link configuration wizard. For example, for PCLaw the dialog now appears as follows.



Select the new option and specify a time. We recommend that you choose a time that is off-hours, and does not conflict with other scheduled services, such as automatic backups your firm may have scheduled, or the Amicus Daily Checks routines which run at midnight.

If using the PCLaw or Timeslips Link, also select a Firm Member who has been granted security access to Firm Files and Contacts. Because this user's login session will be in use whenever a Global Exchange occurs, it is important to schedule a time when they will not require access to Amicus.

Custom Accounting Templates

Two features have been added to custom Accounting Profiles, which give you more control over how posted Time Entries can be exported.

If your Time Entry export format requires a Header as the first row in the output file (an option in the initial screen of the Accounting Profile Wizard), you can now customize the Header Name for each field, such as "Narrative" instead of "Description".

You can also customize the export value of the Billable/Non-Billable field to match the requirements of your accounting system. For example, you may be required to provide "Y" for Billable and "N" for Non-Billable.

Both of these new options are available on Custom Template Field Layout and Details screen of the Accounting Profile Wizard, accessible through Firm Settings. Simply select the applicable field in the right-hand column and complete the Field Details.

Accounting Profile Wizard

Custom Template Field Layout and Details

Select the Amicus fields required in the Posting File. The fields should be added in the order specified by your Accounting System. Special attention should be given to the Field Details.

Available Amicus Fields	Export Order	Required
<Unused Field>	Activity Code	<input type="checkbox"/>
<Carriage Return>	Timekeeper ID	<input checked="" type="checkbox"/>
Date	Full Client Name	<input type="checkbox"/>
Client ID	Full Matter Name	<input type="checkbox"/>
Matter ID	Billing Rate Amount	<input type="checkbox"/>
Full Client Name	Duration	<input type="checkbox"/>
Full Matter Name	Total Value	<input type="checkbox"/>
Billable / Non-Billable	Time Entry Description	<input checked="" type="checkbox"/>

Field Details

Padding: None Length: 1024 Justification: Right Justified

Constant Value (if field blank)

Header Name: Narrative

Accounting Profile Wizard

Custom Template Field Layout and Details

Select the Amicus fields required in the Posting File. The fields should be added in the order specified by your Accounting System. Special attention should be given to the Field Details.

Available Amicus Fields	Export Order	Required
<Unused Field>	Client ID	<input checked="" type="checkbox"/>
<Carriage Return>	Matter ID	<input checked="" type="checkbox"/>
Date	<Carriage Return>	<input type="checkbox"/>
Client ID	Billable / Non-Billable	<input checked="" type="checkbox"/>
Matter ID	Activity Code	<input type="checkbox"/>
Full Client Name	Timekeeper ID	<input checked="" type="checkbox"/>
Full Matter Name	Full Client Name	<input type="checkbox"/>
Billable / Non-Billable	Full Matter Name	<input type="checkbox"/>

Field Details

Padding: Spaces Length: 4 Justification: Left Justified

Constant Value (if field blank)

Header Name: Bill

Billable: B Non-Billable: NB

Easier to read descriptions

For enhanced readability, multi-line text fields are now displayed in larger text throughout Amicus—for example, in the Summary view in File Details, Custom Memo fields in File and People Details, Call Summary in Phone Calls, Note Details, Sticky Messages, and Activity Description in Time Entry Details.

The screenshot displays two parts of the Amicus software interface. On the left is a table with columns for Name, Company, and Role. Below the table are 'Add' and 'Remove' buttons. On the right is a 'Summary' view containing three paragraphs of text.

Name	Company	Role
Janet Baily	House of Grant	Client
Douglas Brackman	McKenzie Brackman	Lawyer
R. Kipling	First Edition Publishing	Party

Buttons: Add, Remove

Ms. Janet Baily
Author
House of Grant
37 Forsyth
Marmora ON K0K 2M0
Canada
(613) 555-8844
(613) 555-8874
janetbaily2@yahoo.com

Summary

Our client Janet Baily is a lawyer and an author of mystery stories based in the exciting environment of a legal practice.

Janet's publisher, First Edition Publishing, has refused to release her latest book, and has withheld a promised advance on royalties.

Janet has retained us to bring an action against First Edition and its editor Mr. R. Kipling for breach of contract.

Expert testimony is going to be required to deal with the defense allegation that the stories were unpublishable due to being unrealistic, allegedly because no lawyer's life was ever as exciting as described in these works.

Adobe PDF Integration








The Amicus Tasks Toolbar, similar to the one you can install in Microsoft Office applications and Corel WordPerfect, is now available from within Adobe Acrobat or Adobe Reader. This enables you to quickly perform tasks on the PDF file you have open in Adobe Acrobat or Adobe Reader. For example, you might have scanned an item into PDF format—you could then click a button to add it as a Document on an Amicus File and/or e-mail it to your client. Or you might have just run an Amicus Time Entry Report for several Timekeepers in the firm and chosen to display it in PDF format—you could then click the Send by E-mail button to send it as an attachment to the Senior Partner.



In Adobe Acrobat X and Adobe Reader X, these buttons and controls are provided from the Tools button at the upper right—expand the “Plug-In Amicus” item that appears below.)

Using the Toolbar

Click a button on the Amicus Tasks Toolbar to perform the corresponding function.

	Details	If the item is associated with a File or Contact, this opens the Amicus Document Details. If the item is associated with a Library Page, this opens the Amicus Library Page Details.
	* Add to File View Related File Details	Adds the item to Amicus as a Document associated with the File you specify. Opens the Amicus File Details.
	* Add to People View Related People Details	Adds the item to Amicus as a Document associated with the Contacts you specify. Opens the Amicus Person Details.
	Add to Library Page	Adds the item to Amicus as a Library Resource associated with the Amicus Library Page you specify.
	Check Out	Checks out the Document for use. (Available only in an Amicus-Managed Documents environment.)
	Check In	Checks in the Document which you checked out earlier. (Available only in an Amicus-Managed Documents environment.)
	Send by E-mail	Sends the item as an attachment on an e-mail. The Amicus New E-mail dialog appears with information filled in where possible. Choose the recipients and/or add a File, and then click Open to complete and send the e-mail with the attachment from Outlook. If E-mail Integration with auto-save is enabled, the e-mail will be saved on the designated Files or Contact.

* The action for this button toggles depending of the current state of the PDF.

Installing the Toolbar

Install the Amicus Tasks Toolbar into Adobe Acrobat or Reader from your Document Assembly Preferences in Amicus.








- 1** *If using Windows 7, Vista, or Server 2008*—Right-click on the Amicus Attorney icon on your Desktop and choose Run As Administrator before logging in to Amicus.

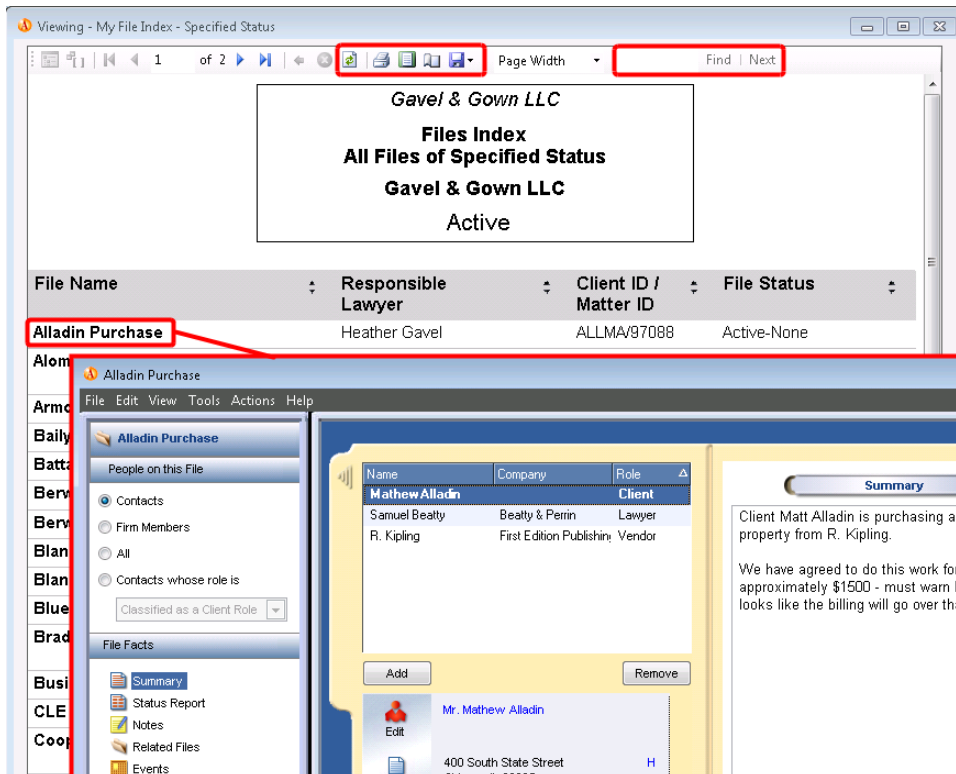
- 2** Go to the Office module, choose Preferences, and click Documents - Document Assembly.
- 3** In Step 3, specify the location of your Adobe program (.EXE file) and click Install.
- 4** *If using Windows 7, Vista, or Server 2008*—After installing the Tasks Toolbar and saving your preferences, exit Amicus Attorney. Then log back in (without choosing to Run As Administrator) to continue working in Amicus.
- 5** *In Adobe Reader X*, you might need to allow access to the Toolbar. In Reader, from Edit > Preferences > General, clear the “Enable Protective Mode at startup” option and click OK. Restart Adobe Reader.

SQL Server Reporting Services

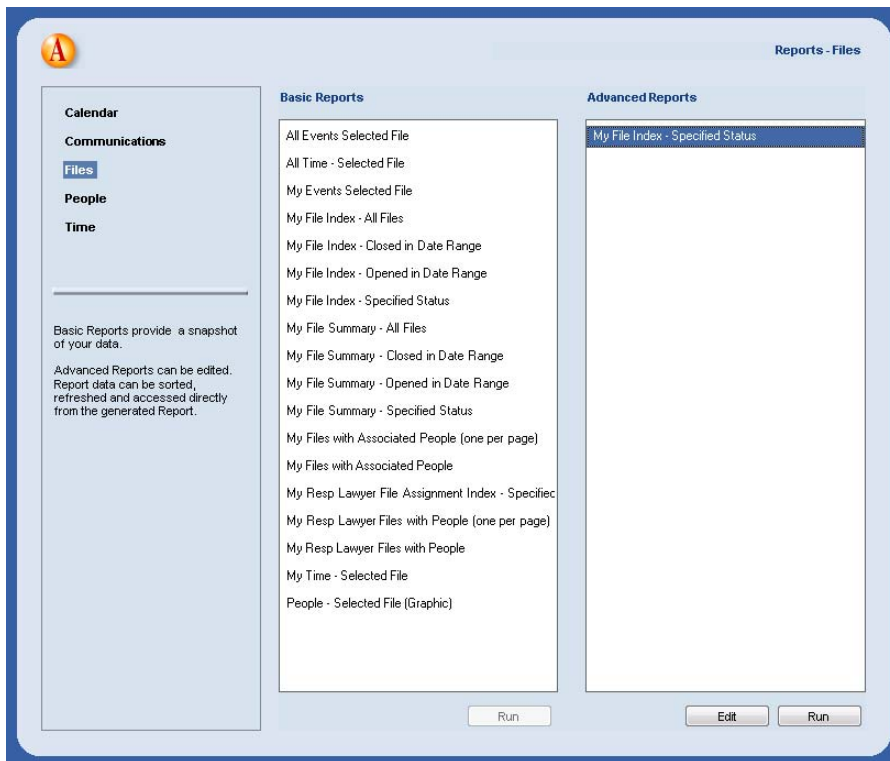
Amicus Attorney Premium Edition 2011 now supports SQL Server Reporting Services. This Microsoft server-based report generation system is available as an install option in SQL Server. Now Amicus users can generate and author easy-to-use *interactive* reports!

Generated SQL Reports open in a Report Viewer that enables you to:

	Control the sort order based on the data in this column.
	Drill down to view the actual data in Amicus. For example, in the Files Index report you can click on a File Name field to open the corresponding File Details.
	Refresh the data in the report.
Find Next	Search the report for the text you specify.
	Export the report in a wide variety of formats.
	Change the page setup (margins, etc.)
	Preview the page layout.
	Print the report.



In the Amicus Office module, the Report views for Firm Member Reports and Firm Reports include Basic and Advanced sections.

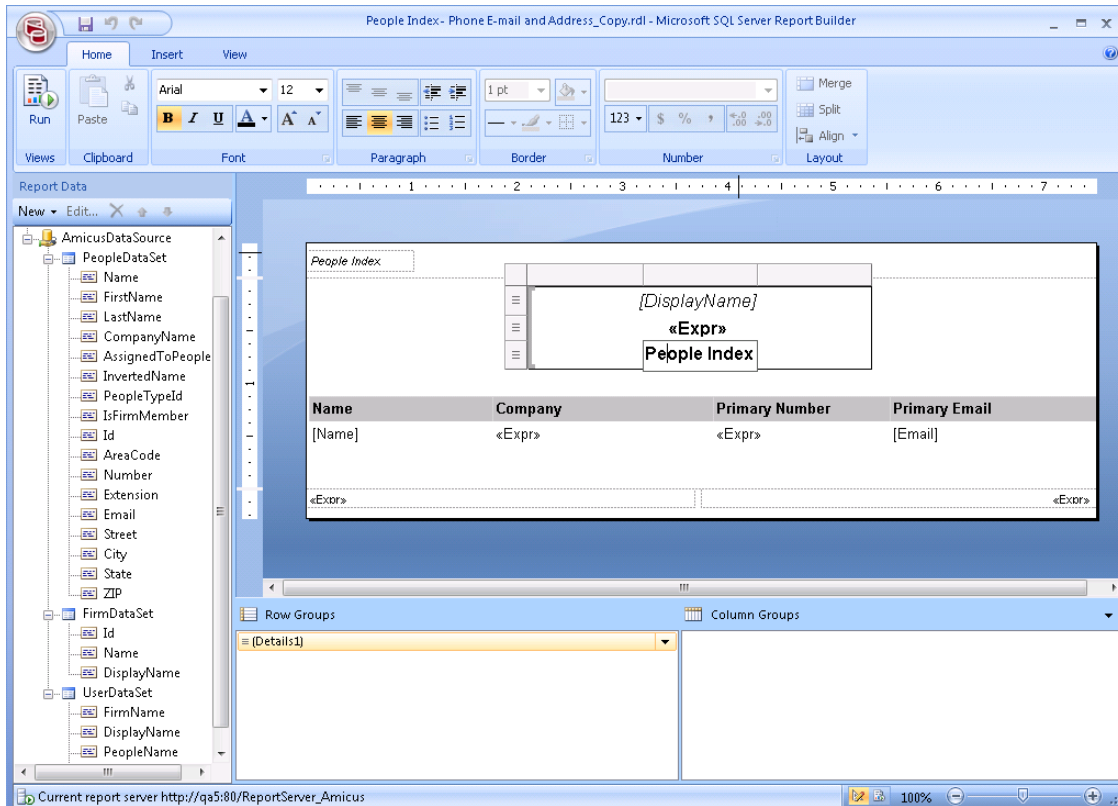


The reports in the Basic section provide a static snapshot of your data that can be generated in the following formats: Excel, PDF, DOC, or RTF. However, the report template itself cannot be edited from Amicus.

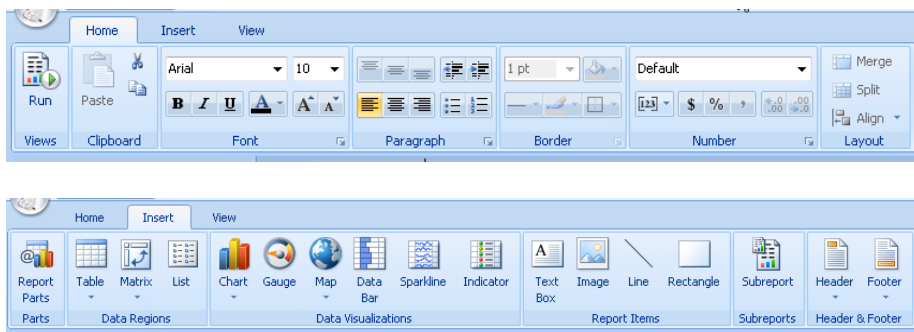
The Advanced section includes an assortment of SQL Reports that can be generated in a wider variety of formats including Excel, PDF, DOC, CSV, XML, TIFF, and HTML Web Archive. These reports can also be edited directly from within Amicus. It's easy to create a new report by basing it on one of the existing SQL Reports.

Editing reports

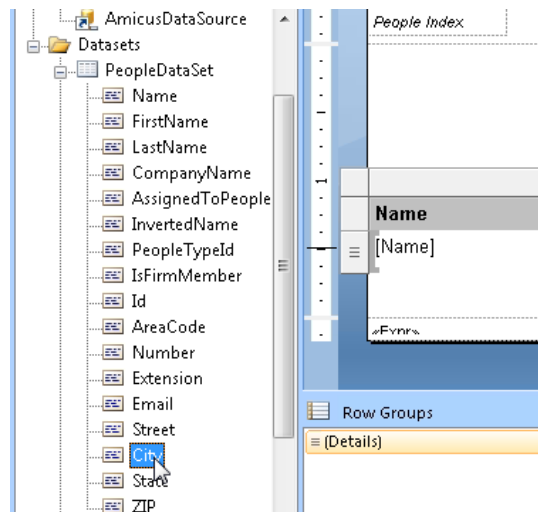
SQL reports can be created and edited with **Report Builder** (available as a free download from Microsoft).



Report Builder is an easy to use authoring tool with Office-like functions—users will instinctively be able to use the formatting functions from the familiar Ribbon.



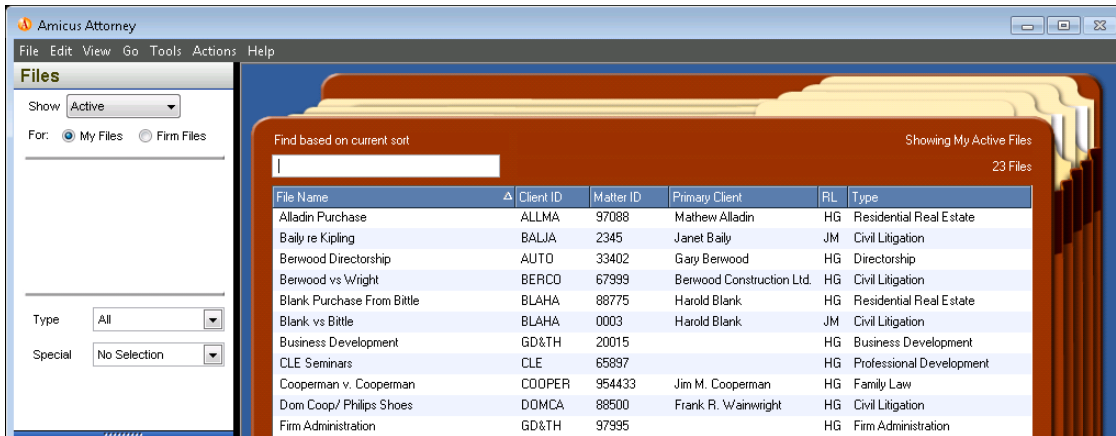
Fields can be added simply via drag-and-drop from the Report Data pane to the design surface. The Amicus database fields and pre-defined objects (such as People on File) are presented in an easy to understand way.



To learn all about this new Reporting feature, see the *Using SQL Reporting Services with Amicus* guide, available from the Office Help Center in Amicus and from the Support > Technical Resource Guides section of our website.

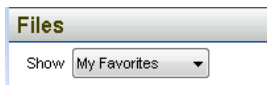
Files Index enhancements

Additional columns and filters in the Files Index give you greater control over how you view your list of Files.



My Favorites filter

The Files Index can now be filtered to show your Favorite Files.



Greater Flexibility when viewing Firm Files

For those with rights to see all of the Files in the Firm regardless of assignment, new filters let you filter the list based on File assignment by:



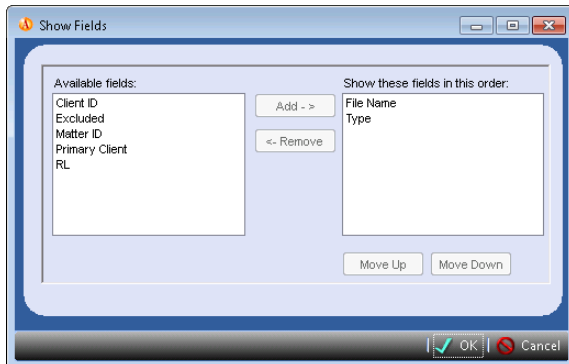
- All or selected **Responsible Lawyers**
- All or selected **Firm Members**
- All or selected **Primary Clients**
- All or selected **Clients**. (This includes those Contacts on Files whose Role on File has been classified as “Client Role”. This is a new feature in Premium Edition 2011 described elsewhere.)

View more File information

File Name	Client ID	Matter ID	Primary Client	RL	Type
Technology Committee	GAVGA	95098		BD	Firm Administration
Firm Administration	GD&TH	97995		HG	Firm Administration
Business Development	GD&TH	20015		HG	Business Development
CLE Seminars	CLE	65897		HG	Professional Development
Neighbour re Rhodes	NEIGH	94238	Anne Neighbor	HG	Personal Injury
Berwood vs Wright	BERCO	67999	Berwood Construction Ltd.	HG	Civil Litigation
Parker Agency	PARKER	984643	Bill Parker	HG	Agency
FirstHome Developments	FIRSTH	206226	FirstHome Builders	HG	Real Estate Development
Dom Coop/ Philips Shoes	DOMCA	88500	Frank R. Wainwright	HG	Civil Litigation
Sydenham re Public Commission of Inquiry	FRANKSYD	32597	Frank Sydenham	HG	Administrative Law
Widgetco Share Purchase	119	6679	Frank Williamson	HG	Corporate
Berwood Directorship	AUTO	33402	Gary Berwood	HG	Directorship
Gallagher Will	GALGE	97035	George Evan Gallagher	HG	Wills/E states
Blank vs Bittle	BLAHA	0003	Harold Blank	JM	Civil Litigation
Blank Purchase From Bittle	BLAHA	88775	Harold Blank	HG	Residential Real Estate
Markham Realty re General	12345	239	Harold Markham	PM	Corporate

Now you can display and sort by the following in your Files Index:

- The **Primary Client** on your Files
- The **Responsible Lawyer** on your Files
- Your Files that are flagged to be **excluded from Accounting Link exchanges**. This column includes a convenient editable checkbox. Now you can update your list of Files without opening each detail. This column is only available to those who are configured to use integration with Amicus Accounting, PCLaw, QuickBooks, or Timeslips.



To add or remove columns, simply right-click on the column heading and choose Show Fields. Then choose the desired columns and adjust their order as you wish.

People on the File enhancements

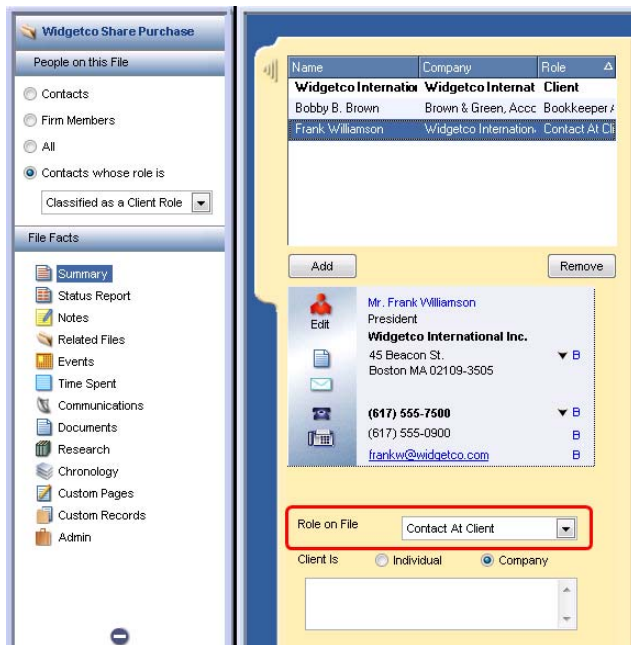
Client-classified Roles on File

Specifying a person's role on a File lets you know at a glance how that person is involved with your File. Amicus allows you to customize the list of Roles on File to suit your practice, and provides filters for viewing only individuals assigned to a specific role on the File.

The most important role is that of Client. However, some of the individuals you assign to a File may be affiliated with the Client, but they are not the actual Client who has retained you and is responsible for paying your bill. For example, your client's assistant or accountant. Or in the case of a corporate client, the main contact at the client's office.

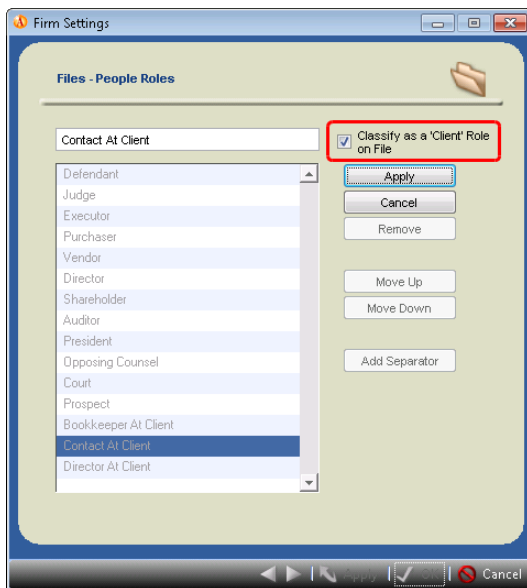
Now you can customize any Role on File to be "classified as a Client Role". Then use the new filter option to view all the People on the File who have a role that is classified as Client, and still get a clear indication of their position as it relates to your client.

In File Details, you can easily filter the list of Contacts on a File to all Client-classified Roles (including "Clients")—in the Control Panel, select "Contacts whose role is" and the option "Classified as Client Role".



Assigning a Client-classified Role to a Contact automatically assigns them to the "Clients" Contact Group for convenience.

To customize a Role with this new classification, in Firm Settings, click Files - People Roles, select a Role, and click Edit. Select the Classify as a 'Client' Role on File option.



Primary Client on File

For easy identification, the Primary Client on a File is now shown in **bold** in the People on the File list.

Default Full Client Name and Full Matter Name

When opening a new File, the Full Client Name and Full Matter Name fields are now auto-filled by the name of the Primary Client and Short File Name, respectively. You may proceed to edit these values as desired.

Negative values in Numeric and Currency Custom Fields

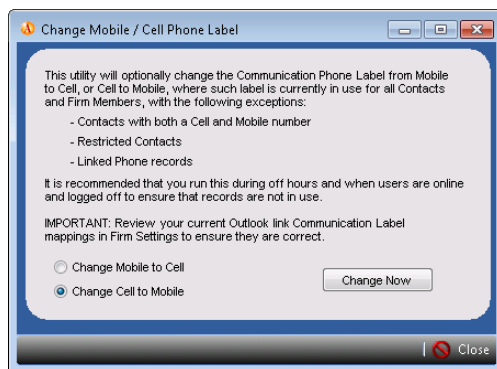
You may now enter negative values in Numeric and Currency Custom Fields in Custom Pages and Records. Negative values will display and calculate in Custom Record lists.

Temperature	<input type="text" value="-23"/>
Balance	<input type="text" value="-\$2,447.35"/>

Phone Label Change Function

A new function enables your firm to ensure consistent use of either “Mobile” or “Cell” as a Phone Label throughout all Contact and Firm Member records. Using a standardized label better accommodates exchanges via the Outlook Contacts & Calendar Link, especially to facilitate a more accurate three-way exchange with mobile devices. Advise users to use only the preferred Label.

- All users should be online and logged out, to ensure that records are not in use (and available to be changed by the utility). We recommend that the process be performed during off hours.
- If using the Outlook Contacts & Calendar Link, review the firm’s Phone Label mapping settings in the Configuration wizard, available from Firm Settings > Link - Outlook Contacts and Calendar. For example, if “Mobile” is the preferred Label in Amicus, ensure that the Link is configured to exchange Outlook Mobile phone numbers with Amicus Mobile phone numbers.
- As an Amicus Administrator with rights to access Firm Contacts, go to the People module and display Firm Contacts. Then choose **Change Phone Label** on the Actions menu.
- In the Mobile/Cell Phone Label dialog, choose to change all “Mobile” Phone Labels to “Cell” or vice versa, and then click Change Now.



TIP: This function changes existing data only. It can be run from time to time as a general maintenance function when desired.

Any records that have been changed will be flagged to be exchanged with Outlook.

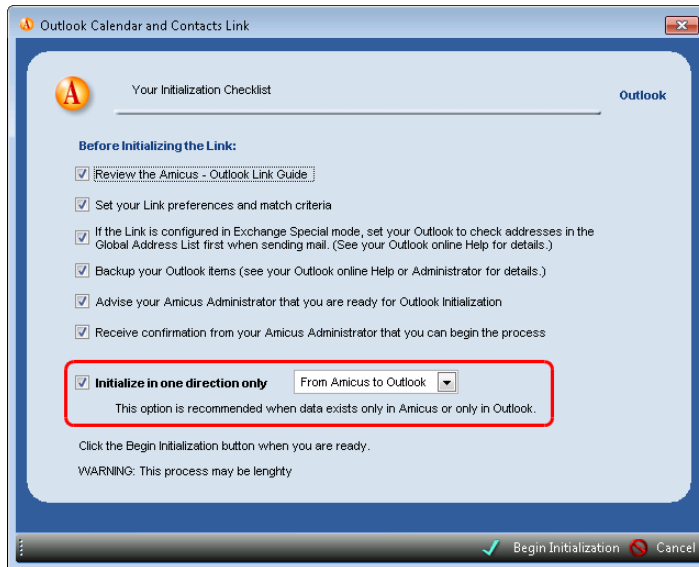
The function will not change the label for those Contacts and Firm Members where:

- They have both a Cell and Mobile phone number.
- Their Cell or Mobile phone number is shared between a Company and Individuals as a Linked Communications item.
- The record is locked (in use), or is Restricted and you do not have access.

Outlook Contacts & Calendar Link enhancements

For faster processing when Initializing or Reinitializing the Outlook Contacts & Calendar Link, users may now choose whether to process items in one direction only (from Amicus to Outlook or vice versa). We recommend that you use this option if data exists only in Amicus or only in Outlook.

- **Initialization**—Set this option on the Initialization Checklist dialog (Step 4) of the Link Configuration wizard.



- **Reinitialization**—Set this option on the Reset Link dialog (Reset Step) of the Link Configuration wizard.



Worldox Link enhancements

Amicus now provides new configuration options for Worldox integrations that provide more flexibility for Worldox Profile Group Client/Matter configurations, as well as the ability to filter to Documents of a specific Type in Worldox directly from the Amicus Files Details.

Your Amicus Consultant or Gavel & Gown Technical Support can help you set up your Worldox integration with Amicus so it works the way that best suits your Firm.

Worldox Profile Groups Configuration

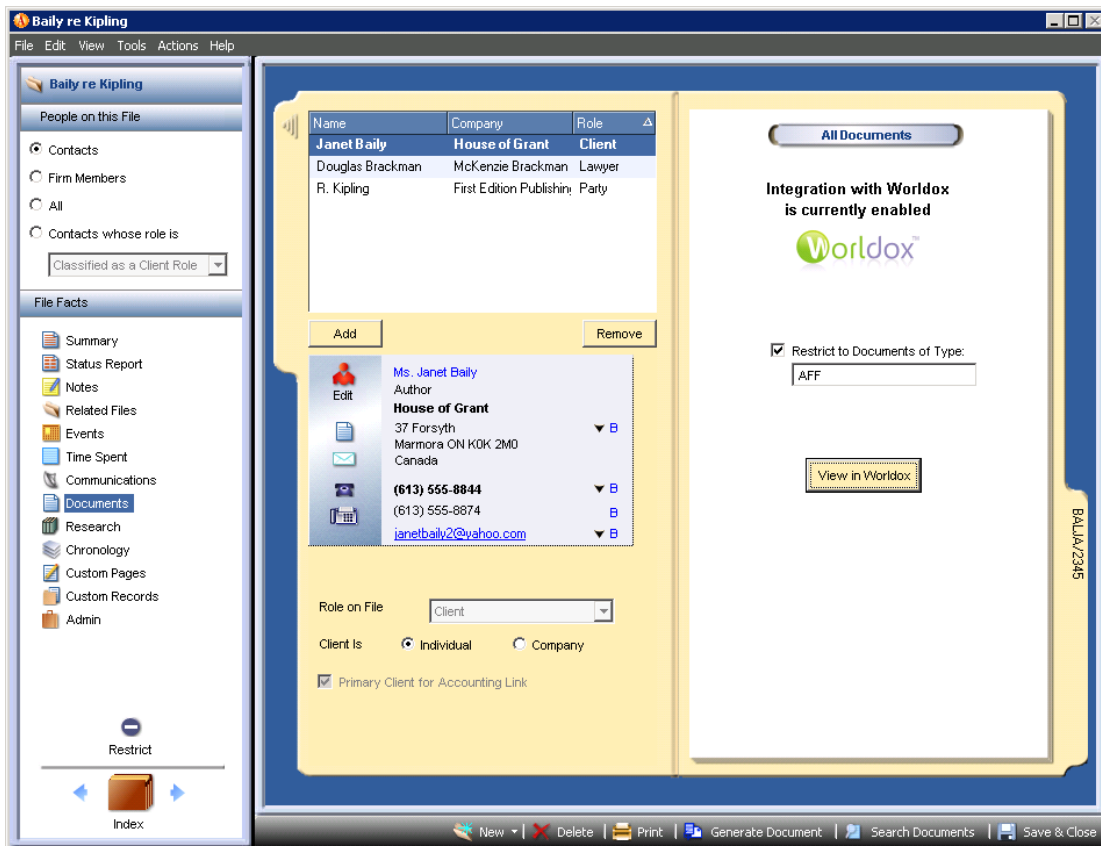
Rather than limiting your integration to Worldox Profile Groups that have Client and Matter configured in Fields 1 and 2 respectively, Amicus now supports other configurations of these two fields. For example, your Firm may prefer to have Department in Field 1, Project in Field 2, Client in Field 3, Matter in Field 4, and Document Type in Field 5.

As before, we recommend that the Client and Matter Fields be set in Worldox to the maximum character length, and the Matter field must be set in the Worldox Profile Group as being “Linked to prior field”, namely Client.

Viewing Documents of Specific Type(s) from an Amicus File

Provided your Worldox Profile Groups include a Document Type Field, you can now optionally choose to view Documents filtered to the Type you specify, such as AFF.

From the Amicus File Document brad view, simply enter the Document Type you want to see, and click View In Worldox.



Did you know?

You can apply the search capabilities of Worldox to your advantage when using filters such as the “Restrict to Documents of Type” field. For example, your Amicus File has over 500 documents in various Document Types in Worldox, such as Email, Affidavits, Discoveries, Motions, etc., and the majority of the documents are Email. To see all documents except those that are Email, enter “NOT EMAIL”—the result will be all other documents, except Email. Or you could enter “AFF OR DISC*” to view all Affidavits and Discovery documents related to the File. These capabilities extend to the Search Documents dialog in Amicus. For more information, see the Text Searching topic in the Worldox Help.



Gavel & Gown Software Inc.

Phone: 800-472-2289

416-977-6633

Fax: 416-977-2563

www.amicusattorney.com

info@amicusattorney.com

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