



Amicus Attorney V+ The Secondary Office Feature

The Amicus Attorney Secondary Office is available only in the Advanced and Client/Server Editions of Amicus Attorney, Version 4.1 or higher.

Contents

Using the Secondary Office feature	1
Sample scenarios.....	2
Packing your Amicus Briefcase.....	4
Installing/upgrading the Secondary Office software	6
Unpacking an Amicus Briefcase.....	7
Using Remote Update (Client/Server Edition users only).....	8

Using the Secondary Office feature

The Amicus Attorney Secondary Office provides Team Members with the ability to access their Amicus Attorney information at a remote site. Regardless of a firm's size, remote access is in high demand and Amicus Attorney offers a unique solution. Whether a firm's lawyers or staff members are away traveling on business, working at home, or situated in another remote location, Amicus Attorney provides the answer to a law firm's remote-access requirements.

To transfer information to your Secondary Office, you pack your Amicus Attorney "briefcase" at your Primary Office, carry that Briefcase to your Secondary Office by disk or send it by e-mail, and then unpack the Briefcase there.

After working at the Secondary Office, you can pack your Briefcase there, transport it back to the Primary Office, and unpack it. This synchronizes the Team database with the work you did at the Secondary Office.

Installing and Upgrading Secondary Office

To install or upgrade Secondary Office on a workstation, you must first pack a Briefcase at the Primary Office, then install the Secondary Office application files on the secondary workstation by using the Amicus Attorney installation CD, and then unpack the Briefcase on the secondary workstation. You only have to install Secondary Office once on the secondary workstation, not every time you use it.

Remote Update

The Remote Update feature, available only in Client/Server Edition, allows you to synchronize your Primary Office and Secondary Office databases from the Secondary Office, without using Briefcases. You briefly connect the offices by using Windows Dial-up Networking or a correctly configured TCP/IP network connection.

Sample scenarios

The following situations illustrate some of the ways you could use Amicus Attorney Secondary Office.

A computer at home without an Internet or modem connection

You use Amicus Attorney in your office and have a PC at home. You would like to use Amicus Attorney at home, but you have no Internet or modem connection.

The Amicus Attorney Secondary Office feature makes working in Amicus Attorney at home and transferring data between the home and office possible. Using the Amicus Attorney installation CD, you can install Secondary Office application files on your home PC by selecting the Secondary Office Install option.

Since the Secondary Office application files do not contain any of your Office data, after installing the Secondary Office application files, you must “unpack a Briefcase” you “packed” from your Amicus Attorney back at your Primary Office. The Briefcase contains all your Office data required for you to work in the Secondary Office.

After you finish working at your Secondary Office and wish to return to your Primary Office, you can pack a Briefcase of your data, save it to floppy disks or a CD, and bring your Briefcase back to your Primary Office for “unpacking”.

The Secondary Office enables you to make changes to your Amicus Attorney user data at home, create Stickies to be sent to other users upon returning to your Primary Office, create a Time Entry, set an Appointment or To Do, etc. You then simply transfer these changes to floppy disks or a CD, bring them back to the office, unpack your Briefcase, and run a Team update to synchronize the information you entered at your Secondary Office with the Team database.

A second firm office

Your firm has another office location with one PC. You and another lawyer travel from the main office to that office and you both wish to use Amicus Attorney on that PC. Both the PCs at the main office and the PC at the Secondary Office have CD drives.

The CD drives can be used to “pack” and “unpack” the Briefcase files. After packing a Briefcase at your Primary Office and saving the file to a CD, you proceed to your firm’s other office. You install the Secondary Office using the Amicus Attorney installation CD’s Secondary Office Install option. You unpack your Briefcase using the CD drive on that PC.

After you have completed work at this office you pack your Briefcase and leave. Subsequently, the other lawyer attends at this office with a Briefcase she had packed on her Amicus Attorney back at the main office. She then uses the CD drive on the PC you were just using and unpacks her

Briefcase. She is now able to use the same Secondary Office to work in her Office since her Office completely replaces yours.

When either you or the other lawyer leave the Secondary Office, you must pack a new Briefcase and save it to a CD in order to transfer any changes you have made back to your Amicus Attorney at the main office. Once either of you have returned to the main office, you simply unpack your Briefcase, and run a Team update to synchronize the information you entered at your Secondary Office with the Team database.

A home office with e-mail access

You use Amicus Attorney in your office and have a PC at home. You have e-mail both at the office and at home, and you would like to use Amicus Attorney at home.

After packing a Briefcase at work, you e-mail the file to your home. Once at home, you can use your Amicus Attorney installation CD's Secondary Office Install option to install the Secondary Office application files on your home PC. After installing these files you may then "unpack" the Briefcase you packed earlier at your office and begin to work in your Secondary Office. At this point the Briefcase enables you to transfer data between your two office locations by packing it at one office and then unpacking it at the other. The Secondary Office enables you to make changes to your Amicus Attorney Team Member data at home, create a Sticky to be sent to another Team Member upon returning to your Primary Office, create a Time Entry, set an Appointment or To Do, etc. Once you have packed a Briefcase, from either your office or home, then you simply e-mail the Briefcase for unpacking to the other location and run a Team update at your Primary Office location to synchronize the information you entered at your Secondary Office with the Team database.

If your e-mail provider imposes a limit on the size of the files you can send by e-mail, the Secondary Office allows you to save your Briefcase as a series of files, which you can send as separate attachments in a series of e-mails.

Sharing a firm notebook computer

Your firm provides a notebook as a shared resource. Lawyers get to book it out when they need to work away from the office.

Whenever a lawyer books a notebook to take on the road, he or she can first pack a Briefcase at the central office site using a series of floppy disks. Once a lawyer has installed the Secondary Office on the notebook using the Amicus Attorney installation CD's Secondary Office Install option, the Briefcase can be unpacked for working with his or her Amicus Attorney data while away from the main office. After the Secondary Office on the notebook has been installed once, Briefcases can be "packed" and "unpacked" to and from the Primary Office and the notebook that contains the Secondary Office. If the notebook has a modem installed, users can take advantage of the e-mail option for sending the Briefcase as a series of files (if your e-mail provider imposes a limit on the size of files sent) or as a single file (if no limit is imposed) from the offsite location to the main office. Anybody who has access to that user's data can unpack the Briefcase for that user and update the Team database with the information that has been entered offsite.

Using the Remote Update feature

This scenario is only possible with the Client/Server Edition.

You are on a lengthy business trip, and you have a notebook in your possession. It is the end of the month, and the senior partner in your firm wants your time worked included in the firm's monthly bill.

With the Remote Update feature, you can synchronize your Amicus Attorney data from your notebook (or Secondary Office) with the Team database at your Primary Office. The time entries you entered on the road will be transferred to your Amicus Attorney Time Sheet back at your main office. Send a Sticky to your assistant asking him or her to post them to accounting and you have one less thing to worry about. The Remote Update feature can be employed using Windows Dial-up Networking or a correctly configured TCP/IP network connection. This same procedure will also work from your home PC, or from a PC at any other remote location.

Packing your Amicus Briefcase

IMPORTANT: In order to unpack an Amicus Briefcase, both locations must have the same version of Amicus Attorney installed. For example, if you have upgraded from Amicus Attorney Version 5.0 to Version 5.8.x at your Primary Office, you will also need to upgrade from Version 5.0 to Version 5.8.x at your Secondary Office; otherwise, you will not be able to unpack your Briefcase.

You will need to pack your Amicus Briefcase in the following cases:

- Before you install your Secondary Office application files at your Secondary Office location.
- In order to transfer your Primary Office data to your Secondary Office or vice versa.

- 1** Launch Amicus Attorney.
- 2** From the Amicus Attorney Office module, choose the OFFICE menu and ensure that you are working Online (the "Go Online" option should be grayed out).
- 3** Choose OFFICE > Pack Briefcase. The Amicus Briefcase Manager dialog appears.
- 4** Activate the Include Template Files checkbox and/or Include Report Files checkbox if you wish to include them in your Briefcase. This is required if you wish to use document assembly at your Secondary office, ensure the Include Template files check box is activated.
- 5** Choose one of the following methods of packing and transporting your Briefcase:
 - **If you are transporting your Briefcase as a single file (via e-mail, CD, or other removable media)**
 - a** Select the "As a single file" option and click the Browse button. The Save Briefcase As dialog appears.
 - b** Specify the folder in which you wish to save your `Brief.cab` file and click Save.
 - c** Click OK. Your Briefcase begins packing. A `Brief.cab` file will be created.
 - d** Write the `Brief.cab` file to removable media, or attach it to an e-mail to send to your other Office.
 - **If you are transporting your Briefcase as a series of files (via e-mail, CD, or other removable media)**
 - a** Select the "As a series of files" option.

- b** Specify the maximum file size of your Briefcase in kilobytes, and click the Browse button. The Browse for Folder dialog appears.
- c** Specify the folder in which you wish to save your Brief*.cab files.
- d** Complete steps b–d as described above. Ensure that you transport all files.
- **If you wish to save your Briefcase to a series of floppy disks**
 - a** Select the “On a series of floppy disks” option.
 - b** Click OK. Your Briefcase begins packing.

If more than one floppy disk is required for saving your Briefcase (Brief.cab file), the program will properly take care of spanning the package, and you will be prompted each time you must insert a new disk into your A:\ drive.

What is not included in the Briefcase

Report templates, document assembly templates, and any other items not directly in the Amicus Attorney database are NOT transported in the Briefcase from the Secondary Office to the Primary Office. Only your Amicus Attorney database is transferred back to the Primary Office.

If you forget to pack your Briefcase

Remember to pack your Briefcase before leaving one office, and unpack it at your other office before starting new work. This will ensure that you have your most current data available.

- **If you forget to pack a Briefcase at your Secondary Office**, your Primary Office will not get the current data. If you go ahead and work at the Primary Office, and later pack a new Briefcase there and then unpack it at your Secondary Office, you will lose the previous work you did at the Secondary Office. The Secondary Office database is completely overwritten by the newest Briefcase database, without any merging.
- **If you forget to pack a Briefcase at your Primary Office**, your Secondary Office will not get the current data. If you go ahead and work at the Secondary Office, and later pack a new Briefcase there and then unpack it at your Primary Office, you will not lose any work. However you might have a large number of inconsistencies to reconcile when the databases merge.

Installing/upgrading the Secondary Office software

If you are installing the Secondary Office application files for the first time:

- 1** Ensure that you have packed your Amicus Briefcase as described in the preceding section.
- 2** Insert the Amicus Attorney installation CD into the CD-ROM drive of the workstation on which you wish to install your Secondary Office Team Member.
The setup program should start automatically. If it does not, click the Start button and select Run. In the Run dialog, type the following:
`[drive letter]:\Setup.exe`
The Amicus Attorney Install Options screen appears.
- 3** Select the Secondary Office installation option.
- 4** Follow the prompts to install your Secondary Office Team Member. The process is the same as that for the Primary Office installation.

If you are upgrading/updating your Secondary Office application files from an earlier version:

- 1** Ensure that you have packed your Amicus Briefcase as described in the preceding section.
- 2** Insert the Amicus Attorney installation CD into the CD-ROM drive of the workstation on which you wish to upgrade/update your Secondary Office Team Member.
- 3** The setup program should start automatically. If it does not, click the Start button and select Run. In the Run dialog, type the following:
`[drive letter]:\Setup.exe`
The Amicus Attorney Install Options screen appears.
- 4** Select the Secondary Office installation option. Licensing of the Secondary Office is determined by your individual license when you unpack your Briefcase.
- 5** A dialog appears stating that the installer has detected an earlier version of the Secondary Office on your workstation. You are instructed to uninstall this earlier version before continuing. Click the Uninstall button provided in this dialog.
- 6** Once the uninstall process is complete, follow the prompts to upgrade your Secondary Office Team Member.

After the installation/upgrade/update is complete, an Open Briefcase dialog appears, from which you may unpack the Briefcase you packed earlier back at your Primary Office. See the following section, "Unpacking an Amicus Briefcase", for instructions on unpacking your Briefcase.

Unpacking an Amicus Briefcase

After transporting your Briefcase, you may unpack it and update your Amicus Attorney data at this location.

IMPORTANT: If you are missing any of your Brief*.cab files, DO NOT attempt to unpack your Briefcase.

- 1** Insert or save your Briefcase file(s) as appropriate:
 - If you transported your Briefcase on CD, insert the CD containing your Briefcase into your CD drive.
 - If you transported your Briefcase via e-mail, open each message and save the attached Brief.cab file or Brief*.cab files to a folder on your hard drive.
 - If you transported your Briefcase on a series of floppy disks, insert the first floppy disk into your A:\ drive.
- 2** Launch your Amicus Attorney Secondary Office.
- 3** From your Amicus Attorney Office module, select the OFFICE menu, and choose Unpack Briefcase.
- 4** From the Open Briefcase dialog that appears, locate and open the Brief.cab file or Brief*.cab files that you transported. Your Briefcase begins unpacking.

NOTE: If there is a series of Brief*.cab files that you must open, you need only open the first file (i.e., Brief1.cab). The following Brief*.cab files will open automatically.

When you unpack a Briefcase at your Primary Office, the system updates the Team database. If there are any records that the system is unable to synchronize due to inconsistent changes made by two people, reconciliation dialog boxes will appear so that you can decide which information to keep.
- 5** When the unpacking is complete, you may proceed to use your Amicus Attorney Office.

File and Client Contact changes

If you have added or edited Files or Client Contacts from your Secondary Office, be sure to exchange that data with your Accounting System after you unpack your Briefcase at your Primary Office:

- **If your firm uses integration with Amicus Accounting**, choose FILES > Amicus Accounting Exchange from the Files Index screen. This will exchange your File changes.
- **If your firm uses links with PCLaw, Timeslips, or QuickBooks**, the exchange takes place when the next accounting global exchange is performed by the Team Administrator.

Posting Time Entries

- **If your firm uses Amicus Accounting**, you cannot use the Post command from your Secondary Office because posting to Amicus Accounting requires a direct link from the workstation. Time Entries created in your Secondary Office may be posted after you unpack your Briefcase at your Primary Office.
- **If your firm uses Juris**, you cannot use the Post command from your Secondary Office because posting to Juris requires a direct link from the workstation. Time Entries created in your Secondary Office may be posted after you unpack your Briefcase at your Primary Office.

- **If your firm uses PCLaw, Timeslips, or QuickBooks, and uses the Centralized Posting method**, any Time Entry posted while using your Secondary Office will be exchanged with your accounting system after you unpack your Briefcase at your Primary Office, when the next accounting exchange is performed by the Team Administrator.
- **If your firm uses Tabs3, or transfers time to your accounting system using either a custom template or one of the standard accounting templates provided with Amicus Attorney (such as Verdict or Manac)**, you can copy your posted file from your Secondary Office workstation to your Primary Office.

To check where Time Entries are posted, go to the File > Setup > Billing tab > Accounting Link tab at each Office. The default is C:\Program Files\AMICUS50\Timepost.

To transfer your Time Entries, complete the following steps after posting your Time Entries at your Secondary Office:

- 1** Using Windows Explorer at your Secondary Office workstation, open your local Timepost folder and copy the posted file onto disk or into an e-mail and transfer it to your Primary Office location.
- 2** Return to your Primary Office (or, if you cannot return, have an assistant at your Primary Office log into your Team Member workstation) and perform the following step.
- 3** From your Primary Office, copy the posted file from disk or e-mail and paste it to your Timepost folder. When prompted whether you wish to overwrite the posted file that already exists, click Yes.

Your Time Entries are now ready to be imported into the firm's accounting system.

Using Remote Update (Client/Server Edition users only)

After you have packed and sent an Amicus Briefcase, and have installed/upgraded your Secondary Office application files at your Secondary Office workstation, you can take advantage of the Amicus Remote Update feature to exchange data between your Secondary Office and Primary Office. When you use the Remote Update feature, Amicus Attorney sends any new or updated information from your Secondary Office to the Team server located at your Primary Office. The Team server in turn responds by sending any new or updated information to your Secondary Office. When the remote update is complete, you can disconnect and continue with your normal offline use of Amicus Attorney from your Secondary Office.

Through Windows Dial-up Networking or through a correctly configured TCP/IP network connection, Client/Server Edition users may update their data from their Secondary Office site by using the Remote Update feature. When the Remote Update feature is employed, all the latest changes take effect in your Secondary Office (and vice versa).

The Remote Update feature does the equivalent of bringing your Secondary Office online, doing a bi-directional synchronization of the practice information, and then immediately going offline again.

NOTE: Only the data that is in the Amicus Attorney database is updated. Document templates, and any other items not directly in the Amicus Attorney database cannot be updated.

Setting up Amicus Remote Update

Amicus Attorney uses standard Windows remote access techniques for communications with the server. Establishing such a connection is up to you, using the most appropriate method for your firm and network. This is not a service that Amicus Attorney provides.

To use the Remote Update feature, you must have access to Windows Dial-up Networking or have a TCP/IP connection to the Team server established. In a TCP/IP connection, two different ports are used: The first port is used for authentication, and the second port is used for the Team database server. Port settings are automatically configured upon installation.

IMPORTANT: Unless you are a network administrator or an Amicus Attorney certified consultant, it is NOT recommended that you attempt to configure a TCP/IP connection yourself.

The following are a few sample methods of establishing a remote connection (this list is not complete):

- *Direct dialing* — A Team Member accesses the firm network from the Secondary Office through modem. The workstation at the Primary Office must have a TCP/IP connection to the Team server. The Team Member selects Remote Update in the Secondary Office and follows the numbered steps detailed below.
- *Internet access through a firewall* — Your firm has a 24-hour-a-day connection to the Internet and has installed a firewall to prevent network traffic from coming in, and possibly going out. The firewall has been configured to forward incoming traffic through the two Amicus Attorney ports to the Amicus Attorney server computer. A Team Member is located at the Secondary Office and has a notebook that can connect to the Internet, either by using Windows Dial-up Networking, or through an Ethernet. In this scenario, the Team Member follows the numbered steps detailed in this section for applying a Remote Update (for the Client/Server Edition – Standard Version) and may have to specify an alternate address for the Amicus Attorney server depending on the server configuration. The Team Administrator must provide this alternate address to the Team Member.
- *Virtual Private Network* — Your firm has set up a virtual private network (VPN) that provides security through encryption. Similar to the scenario described above, the Team Member at the Secondary Office may have to provide an alternate address for the Amicus Attorney server, which must be provided by the Team Administrator.

Using Remote Update

Once your network is properly set up, you can use the Remote Update feature from your Secondary Office workstation.

- 1** Ensure that your Secondary Office workstation is properly connected to the network where the Team server is located at your Primary Office location.
- 2** From the Office module of your Secondary Office, select OFFICE > Remote Update.
- 3** The Remote Update dialog appears. You will be prompted that you need to be connected to your Primary Office location.
 - If you are certain that you are properly connected to your office network, click Continue.
 - If you are required to enter an alternate IP Address, click Settings. In the Remote Update Settings dialog that appears, type in the alternate IP Address in its respective field, click OK, and then click Continue in the Remote Update dialog that appears.

NOTE: If you need to enter an alternate IP Address, it is only required that you do so the first time you perform a remote update.

- If you are using the NLM version for the first time, click Settings. In the Remote Update Settings dialog that appears, you must manually enter the IP Address for the workstation on which Amicus Administrator resides in the Amicus Administrator IP Address field. (Thus, it is necessary to know the IP Address of Amicus Administrator before going offsite to perform a remote update for the first time. Also, you need not enter the IP Address for the computer on which the Novell server resides. It appears in its respective field by default.) Once you have entered the IP Address of the workstation on which Amicus Administrator resides, click OK and then click Continue in the Remote Update dialog that appears.

NOTE: The IP Address for the workstation on which Amicus Administrator resides only needs to be entered the first time that you perform a remote update with the NLM Version.

The remote update will take effect.

NOTE: If there are any records that the system is unable to synchronize due to inconsistent changes made by two people, reconciliation dialog boxes will appear so that you can decide which information to keep.

NOTE: This Remote Update feature is also available with the Go Offline feature. For example, your Primary Office workstation can be a notebook computer, which you can continue to use while disconnected from the office network.

For further information, contact



Gavel & Gown Software Inc.
365 Bay Street, Suite 700
Toronto, Ontario M5H 2V1
Phone: 800-472-2289
416-977-6633
Fax: 416-977-2563
www.amicusattorney.com
info@amicusattorney.com

Copyright © 1994-2006 Gavel & Gown Software Inc. All rights reserved.

AMICUS and AMICUS ATTORNEY are registered trademarks, and AMICUS ACCOUNTING, PRACTICE PACKS, AAI, and DO are trademarks of Gavel & Gown Software Inc.

Microsoft and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and other countries.

QuickBooks is a registered trademark and service mark of Intuit Inc. in the United States and other countries. Amicus Attorney V/V+ is designed for use with the U.S. versions of QuickBooks Pro or Premier Editions only.

All other trademarks referenced are the property of their respective owner. Gavel & Gown Software Inc. disclaims any proprietary interest in trademarks other than its own.