

Integrating PCLaw with other Lexis products & 3rd Party Tools

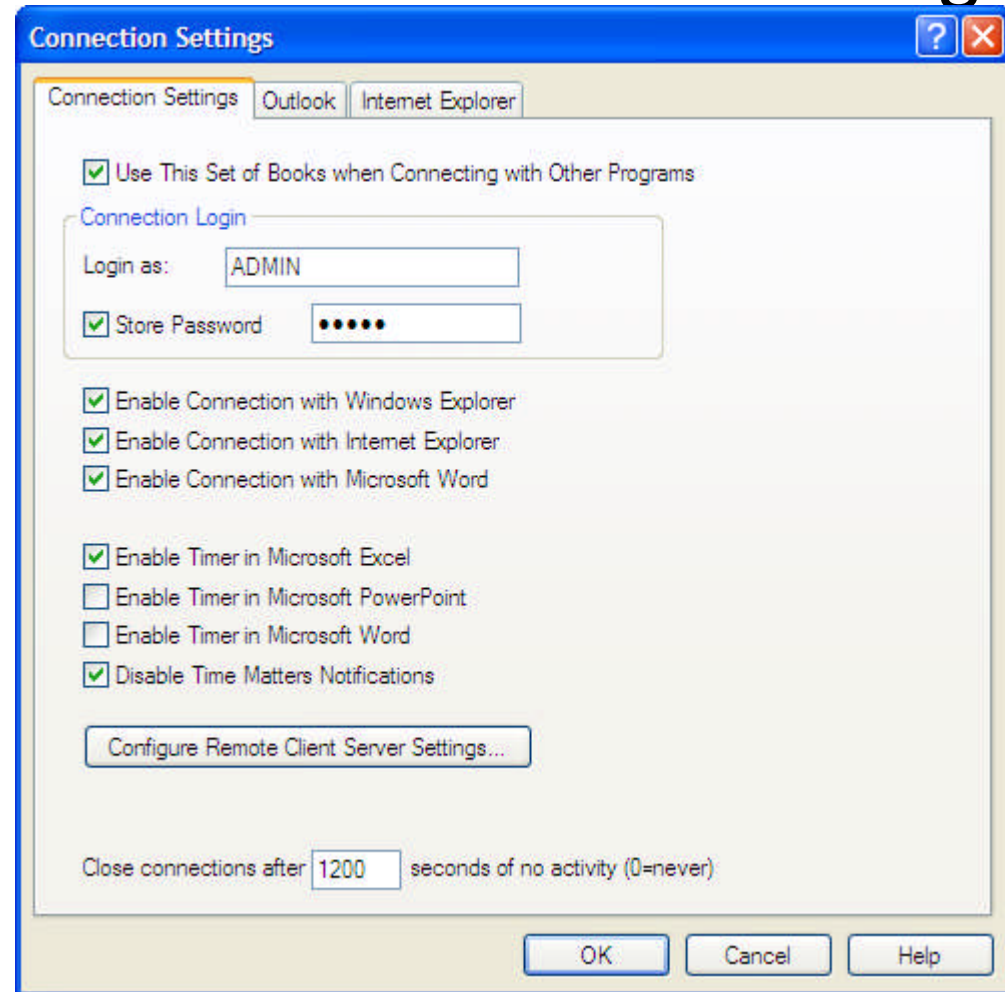
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Affinity Consulting Group, LLC
ATLANTA

Introduction

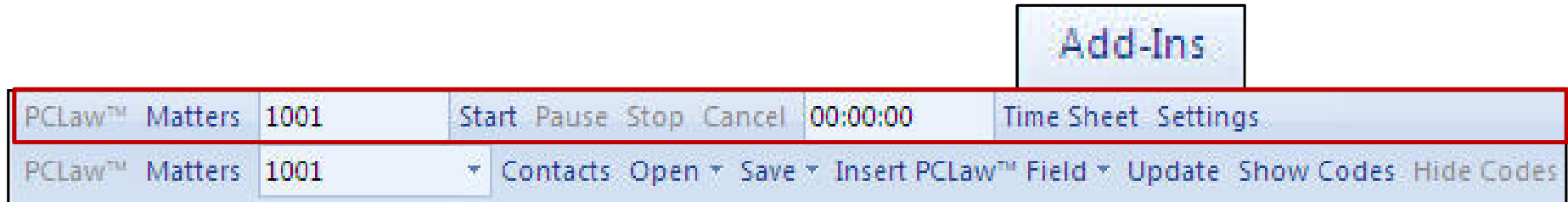
- PCLaw and Microsoft Office Timers
 - Word Timer Toolbar
 - Excel Timer Toolbar
 - PowerPoint Timer Toolbar
 - Internet Explorer
 - LexisNexis Research
- PCLaw and Windows Explorer
- PCLaw and Document Management
 - Word | Word Perfect
- PCLaw and Outlook
- PCLaw and Case Management
- PCLaw and HotDocs
- PCLaw Credit Card Processing
- PCLaw Payroll *powered by ADP*

PCLaw Connection Settings

- Nothing connects to PCLaw without enabling Connection Settings
- **OPTIONS: CONNECTION SETTINGS**
- Workstation Specific
- Includes using the Import Utility
- Includes using the new Auto-Backup Features of v.10
- **MUST ENABLE CONNECTION SETTINGS**
- Connecting program should be **CLOSED** when enabling connection settings at first.



PCLaw and Microsoft Timer Toolbars



TIMER TOOLBARS

- Benefit: Timer Toolbar to enable timekeepers to time themselves when creating a document, email, spreadsheet or PowerPoint presentation;
- Burden: Sometimes Microsoft Word or Outlook have so many other “ADD-Ins” that PCLaw Toolbars will Error Out | Possibly Reinstall
- Benefit: Increases productivity because users do not have to stop and enter time in the application itself or have a nother “window” timer tool running.
- Toolbars available in Microsoft Word, Excel, Outlook and PowerPoint.

PCLaw Document Management Toolbars

Add-Ins

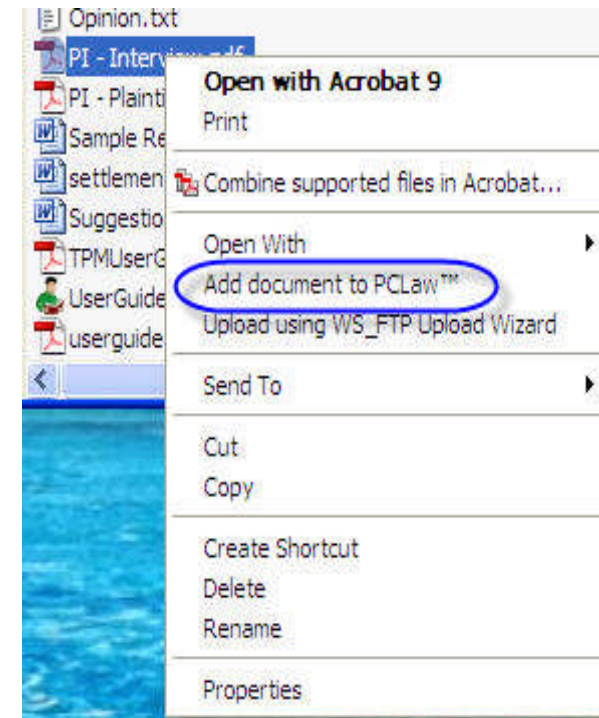
PCLaw™ Matters	1001	Start	Pause	Stop	Cancel	00:00:00	Time Sheet	Settings				
PCLaw™ Matters	1001	▼	Contacts	Open	▼	Save	▼	Insert PCLaw™ Field	▼	Update	Show Codes	Hide Codes

- Not “TRUE” Document Management (but neither is TM);
- Offers the ability to save, retrieve and index documents;
- Quick Docs very clunky document assembly options;
- Set up the Indexer on the firm’s server to start with Windows launch;
- Use Document Manager to index invoices too;
- Save Documents to the Document Manager
- Retrieve documents from the Document Manager | Matter Manager | or from within Microsoft Word
- No connection to Adobe Acrobat | MS-Excel | MS-PowerPoint

PCLaw and Windows Explorer

 Enable Connection with Windows Explorer

- Add Documents, Pictures, PDF's, virtually any file, to the PCLaw document management indexing system
- Manually place the document in the right place before making the connection as the profile will remember the location | network location important;
- Profile the document as if it was saved from within Word or Word Perfect;
- Retrieve from Document Manager or Matter Manager | Docs Tab.



Add PCLaw Document [X]

Document Information

Save To
Doc Name:

Matter:

Document Details

Author: Document Type:

Description:

Comments:

Creation Date: Time: Last Modified: Time:

Source: Doc #:

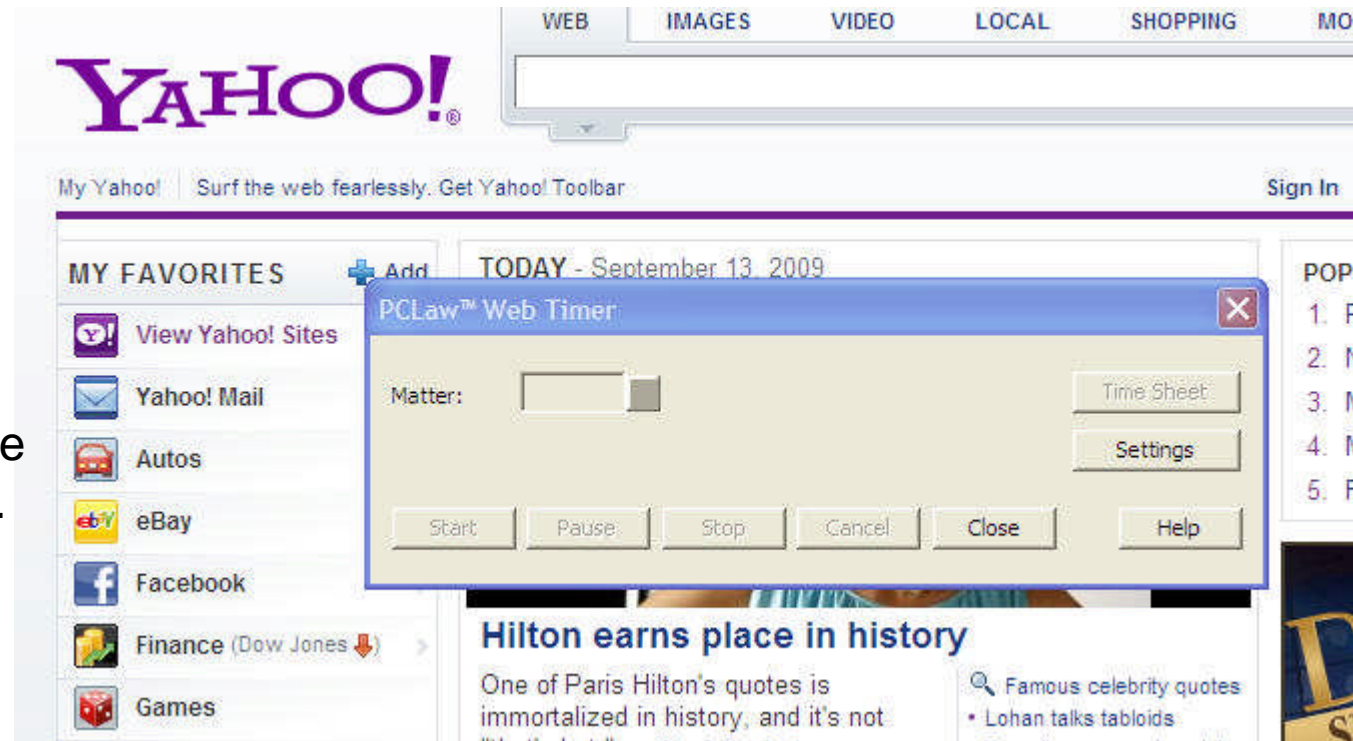
Matter:	Client:	Name:	
Re Line:			
T/Bals:			
Unbd D:	A/R:	Gen Rtnr:	Trust:

PCLaw and Internet Explorer

IE| Tools | PCLaw
Web Timer

Use like any other
Timer Toolbar to
send a time entry
back to PCLaw while
working on the web.

IE 7 or IE 8



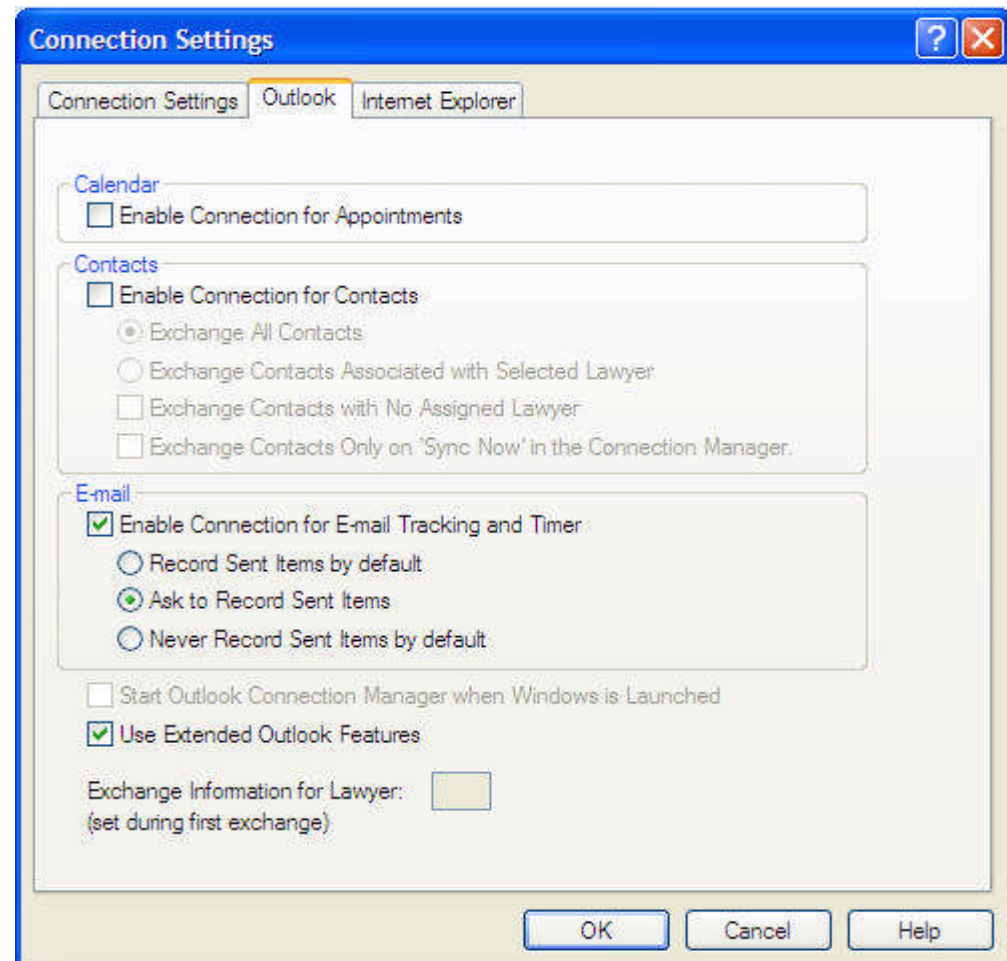
PCLaw and Research

The image displays two overlapping software windows. The 'Workstation Settings' window is in the background, showing tabs for 'Data Entry', 'Calendar', 'Other', 'Color', 'Documents', and 'Research'. The 'Research' tab is active, displaying fields for 'Country' (United States), 'User first URL' (https://www.lexis.com/), 'User second URL' (https://www.lexisnexis.com/r), 'User third URL' (http://www.lexisnexis.com/c), and 'User fourth URL' (http://www.lexisnexis.ca/ql/e). Below these are checkboxes for 'Charge Time' (checked), 'Automatically Start Timer' (unchecked), and 'Charge Expense' (checked).

The 'Lexis Research' window is in the foreground. It features a menu bar with 'New' and 'Save & Close'. The main interface includes a 'Date' field set to 9/9/2005, a 'Start' button, and a 'Hours' field set to 0.10. There are also fields for 'Matter', 'Layer', and 'User' (ADMIN). A 'Description' field and a 'Search URL' field with a search icon are present. Below these are buttons for 'Auto', 'Add', and 'Del'. The 'Library' is set to 'Lexis' and 'Type' is 'Research'. There are checkboxes for 'Charge Time' and 'Charge Expense', both checked. A 'Source' dropdown and a 'Search' field are also visible. At the bottom, there are radio buttons for 'Terms & Connectors' (selected) and 'Natural language', and a 'Date' dropdown set to 'No date restrictions'. A red Lexis logo is centered at the bottom of the window.

PCLaw and Outlook Connectors

- Contacts
- Calendar and Tasks
- Email Integration
- Extended Features



Outlook Connection Manager

- Runs in the Task Bar of EACH Workstation where calendar or contacts are selected in Connection Settings for synchronization;
- Settings are unique to the Workstation and the Default Outlook Profile;
- Can manipulate contact or calendar to another profile in Workstation Registry (selected upon set up);
- Process RUNS in the background (when looking to get everyone out of PCLaw)
- Sync is every 15 minutes or more.

Outlook Contacts and Calendar Sync

Calendar

Enable Connection for Appointments

Contacts

Enable Connection for Contacts

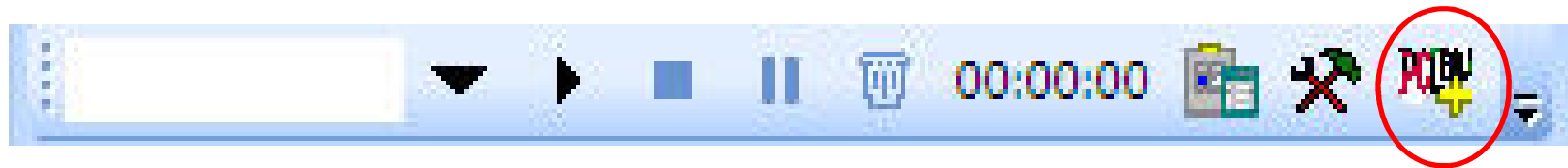
Exchange All Contacts

Exchange Contacts Associated with Selected Lawyer

Exchange Contacts with No Assigned Lawyer

Exchange Contacts Only on 'Sync Now' in the Connection Manager.

Outlook E-Mail Integration



- Save e-mails to matters via document manager;
- Saves e-mails as EML files
- Does NOT save attachments along with the EML file
- Great way to reference all documents and emails related to a matter

Case Management Integration

Client & Matter Management
Time Matters



Time Matters Integration

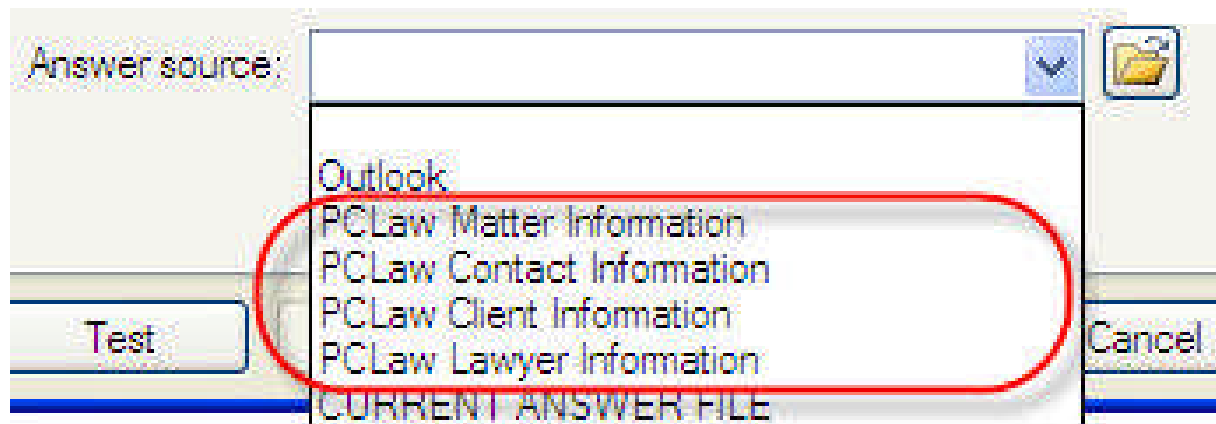
- Contact/Client – CON:CON1_05_01 | Area 5 – Field 1
- Matters/File - MAT:MAT1_05_01 | Area 5 – Field 1
- DO NOT USE THESE FIELDS | RESERVE
- FILE: PROGRAM LEVEL: LINKS: PCLaw
- FILE: USER LEVEL: LINKS: PCLaw
- Trick to integration is proper planning
- PCLaw to TM – Sync en-masse
- TM to PCLaw – currently – per matter exchange
- Look Up Fields

Amicus Attorney Integration

- Requires PCLAALINK.KEY file in the DATA folder
- Key Code – 5 alpha/numeric digits – available from CIC line
- En-Masse or Per File exchange in either direction with Amicus Premium Edition
- En_masse exchange in both directions with small firm edition exchange at the Amicus Administrator
- Look Up available in files if DIRECT POSTING (SFE)
- Look Up available in files in PE
- PLDOCLNK.EXE file to diagnose PCL-AA exchange issues

PCLaw - HotDocs Integration

- PCLaw as HotDocs Dialog Answer Source
- Contacts, Matters and Custom Information
- Map Integration



- Generate Documents from HotDocs Interface Only

PCLaw Credit Card Processing

PCLaw™ - Add Credit Card User

User Name:

Description:

Allow Access to administrative functions

Password:

Retype Password:

Passwords have to be at least 8 characters long with a combination of numbers, letters, and symbols. Spaces are allowed so you can enter phrases. Passwords expire in 90 days.

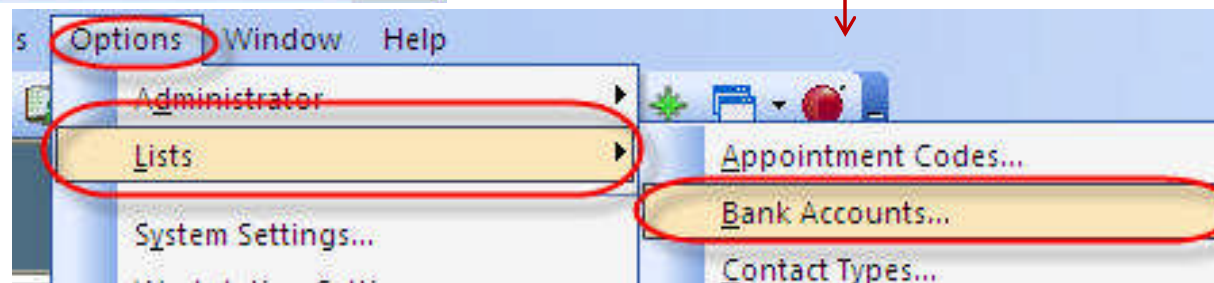
User must change password at next logon

Account is disabled

OK Cancel

- Set up SECURITY in OPTIONS | ADMINISTRATOR | CREDIT CARD SECURITY

Then Set up the Bank Account to Receive Funds



Credit Card Set Up (B)

- Contact PPI to set up an account
- Once the account has been secured - PPI will send the end user a CODE
- Plug the CODE in per THEIR instructions under
OPTIONS | LISTS | BANK ACCOUNTS

Configure Merchant Account...

PCLaw Payroll

- PCLaw Payroll is INTERNAL PAYROLL with Tax Tables furnished by ADP
- IT IS NOT a Payroll Service
- By Default MOST G/L accounts are set up as Payroll Accounts
- OPTIONS | LISTS | GL ACCOUNTS

Change G/L Account

General Ledger (G/L) Account

Nickname 2200

Account Payroll Clearing

Show Account in Pop Up Help

Payroll Account

Account Type

Type Short Liability

Lawyer

Account Details

Category

Cost Center

Department Firm

Sub Account of

OK

Cancel

Help

Payroll Set Up (B)

The screenshot displays the Lexis Back Office Payroll system interface. At the top, there are navigation tabs for 'Payroll Home', 'Employees', 'Company', 'Reports', and 'Taxes'. The 'Payroll Home' tab is active. A sidebar on the left lists various payroll functions: 'Payroll Home', 'Regular Payroll', 'Special Payroll', 'Manual Checks', 'Void Checks', 'Third Party Sick Pay', 'Print', 'Create Files', and 'Other Payroll Tasks'. The main content area features a 'Payroll Setup' section with a message: 'Before you can run your first payroll, you need to set up your company, employees, and independent contractors. To set up your company, click Set Up Your Company in the Payroll Setup section.' Below this message are four buttons: 'Set Up Your Company', 'Set Up Employees', 'Set Up Contractors', and 'Add Your Payroll Runouts'. A 'Payroll Cycle' diagram shows a circular flow: 'Run Payroll' leads to 'Print Checks', which leads to 'Print Reports', which leads to 'File Taxes', which leads back to 'Run Payroll'. To the right of the cycle is a promotional banner for 'TOTAL PRACTICE SOLUTIONS' with the tagline 'Firms Serving Individuals and Small Business'. Below the cycle are 'Messages' (stating 'You currently have no messages') and 'Tasks (1 item)' (listing 'Set up your company'). The footer includes 'Lexis Back Office - Payroll', 'Client ID: 40000297', 'Terms & Conditions | Privacy & Security | Contact Us', 'Copyright © 2007 ADP Inc. All rights reserved.', and the LexisNexis logo.

Support | Sign Out

Payroll Home | Employees | Company | Reports | Taxes

Step 1 of 2
1. Enter Payroll
2. Preview Payroll

Enter Payroll for Employees - Monthly

Enter the payroll details for each employee that you need to pay. If you need to pay an employee at an additional rate or in an additional department, click Add Row and continue to enter the payroll details. If you need to pay an employee more than one check, click Add Check and continue to enter the payroll details. If you need to override a tax or deduction amount for an employee, highlight the appropriate check and click Employee Overrides.

Period start date: 04/01/2008 | Period end date: 04/30/2008
 Check date: 04/29/2008 | Stop direct deposit: [Delete this Payroll](#)

Employee Name	Department	Rate	Regular Hours	Salary Amount	Overtime Hours
Flint, Fred				2000.00	
Macenally, Keith		25.00	140.00		
McDougal, Harrison				1200.00	
Montgomery, Elizabeth		20.00	140.00		
Totals			280.00	\$3200.00	0.00

Page 1 of 1: 1

[Employee Overrides](#) | [Add Row](#) | [Delete Row](#) | [Add Check](#) | [Cancel](#) | [Previous](#) | [Next](#) | [Finish Later](#)

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Lexis® Back Office – Payroll
powered by ADP

LexisNexis®

PCLaw Payroll (C)

- Internal Payroll Processing
- Print Checks in the office OR send ACH draft to bank
- Process Frequency up to the firm
- PRINT checks on standard check stock
- Journal Entries entered into PCLaw directly
- Reports are SIGNATURE READY
- Firm MUST remember to send reports and remit taxes
- NOT A PAYROLL SERVICE

Credit Card Set up (C)

PPI WILL FURNISH:

- TOKEN CODE
- WEB SITE INFORMATION TO VOID or CHECK ON CHARGES PENDING
- DIAL UP NUMBER FOR REJECTED CHARGES

CONCLUSION

- Myriad of connection tools to PCLaw
 - Microsoft Office Toolbars
 - Microsoft Windows
 - Microsoft Internet Explorer Timer
 - Document Management Tools
 - Email Management
 - Outlook Calendar/Contact Synchronization
 - Time Matters Link
 - Amicus Attorney Link
 - HotDocs Dialog Answer Source
 - Credit Card Processing
 - ADP Payroll (uses tax tables)

THANK YOU!

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