

Abacus for Smarties

For people smart enough to use Abacus Law

**Includes INTRO TO ABACUS COURT FORMS and
INTRO TO PATHAGORAS DOCUMENT ASSEMBLY
plus “EXTRA MATTER TABS”**

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Prepared for

Staff Training

BY

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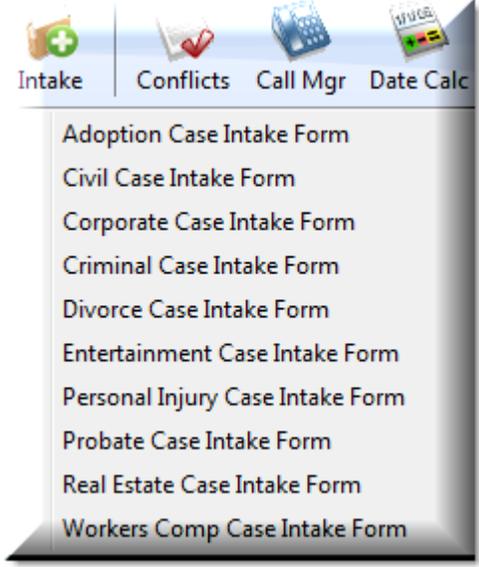
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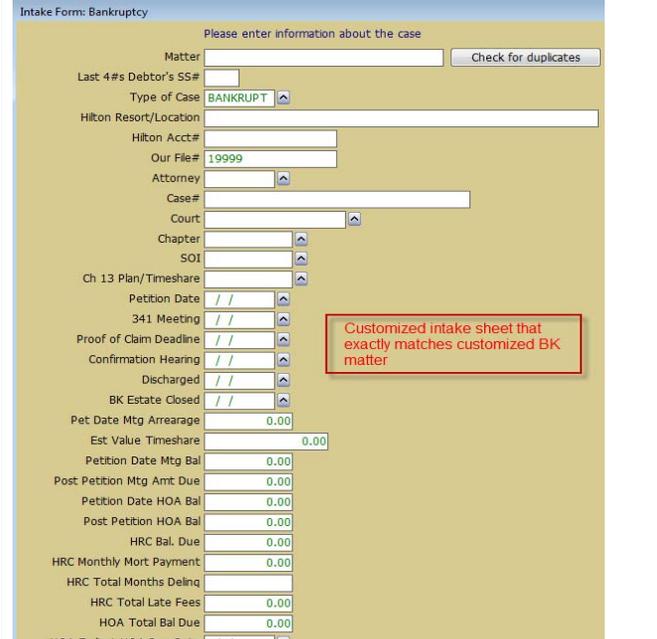
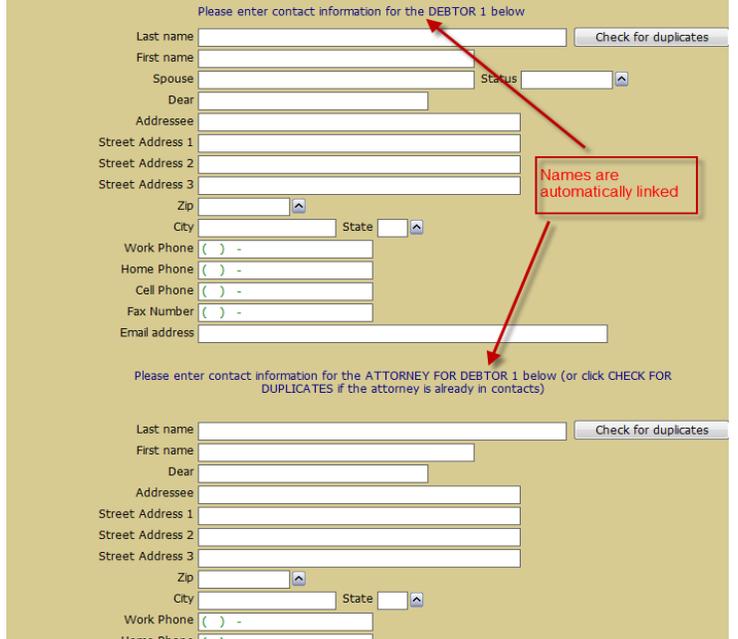
I. INTAKE FORMS DO THE LINKING FOR YOU

PLEASE NOTE THAT THE INTAKE FORMS THAT COME WITH ABACUS MAY NOT BE SUITABLE FOR YOU IF YOUR DATABASE IS CUSTOMIZED. To create a customized intake form, please follow the directions in your Abacus manual or call EsqWired Computer Consulting for customization

1. Click on INTAKE icon on your toolbar (or click on MATTERS, INTAKE FORMS)
2. Click on desired intake sheet
3. Fill in all known fields
4. Save when done
5. All your Matter and Contact information (as well as events if you desire) will be entered into Abacus with the appropriate links:

	<p>Intake forms can be customized to exactly match any or all of the fields on your custom matter screen</p> <p>You can set up multiple linked contacts on the intake sheet.</p> <p>You can set up must-do events or statute deadlines, etc.</p> <p>This way, the person who does the new matter intake cannot miss calendaring an important statute, deadline or linking a contact</p> <p>If you would like to get custom made intake forms, please follow the directions in your Abacus manual or call EsqWired Computer Consulting for customization</p>
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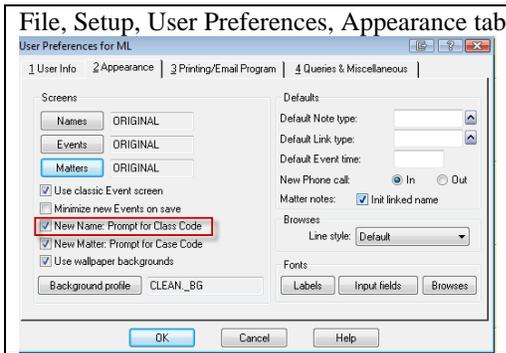
Sample Bankruptcy Intake Sheet fills out all desired information and links contacts and important calendar events (see entire sample BK screen on Page 6). Please note intake sheets are available ONLY once, upon intake.

 <p>Customized intake sheet that exactly matches customized BK matter</p>	 <p>Names are automatically linked</p>
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II. ADD A NEW CONTACT

1. Click on the CONTACT icon on your toolbar
2. To make sure the name is not already there, click on the NAME column and type name.
3. Then click on ADD*
4. Type desired information
5. Click on SAVE
6. To add new names, start again on step 1 (no need to close the one you are on)

***SMART SCREENS NOTE:** If you are using “smart screens”, make sure you switch on your options (on each person’s desktop) to be prompted for the correct “smart screen”



If you would like to get your Abacus completely customized to your own practice with SMART SCREENS, please follow the directions in your Abacus manual or call EsqWired Computer Consulting for customization – see some samples below.

Each category or “class” of contact can have their own screen – Doctor, Adjuster, Attorney, Client, etc.

Sample Adjuster screen

1 Standard | 2 Notes | 3 Linked Matters | 4 Linked Events | 5 Linked Docs | 6 Linked Names

Class: ADJUSTER

Last name: Lopez | Work: (800)340-8602
 First name: Maria | Direct: () -
 ID: 10 | Fax: () -
 Dear: Ms. Lopez | Cell: () -
 Email: []

Adjuster: Maria Lopez
 Ins. Co.: Zurich North America
 Address: P.O. Box 628210
 Zip: 32862 | St: FL
 City: Orlando

Sample addition to a Client screen

PERSONAL INFORMATION

D.O.B: / /
 Age: 0
 Gender: []
 Driver Lic#/ID: []
 Social Security: - - -
 Primary Language: []
 Country of Birth: []
 Legal Status: []
 Marital Status: []
 Children: []

Sample Doctor screen

Class: DOCTOR

Last name: [] | BILLING INFO (if different from Doctor)
 First name: [] | Contact: []
 ID: 4114 | Firm: []
 Dear: [] | Address: []
 DOCTOR INFO | City/State/Zip: []
 Name of Dr.: [] | Main: () -
 Clinic: [] | Direct: () -
 Address: [] | Fax: () -
 Zip: [] | Email: []
 City: [] | St: []
 Main: () -
 Direct: () -
 Fax: () -
 Cell: () -
 Email: []
 Expertise: []
 Rate: []
 Tax ID: []

RECORDS CUSTODIAN INFO (if different from Doctor)
 Contact: []
 Firm: []
 Address: []
 City/State/Zip: []
 Main: () -
 Direct: () -
 Fax: () -
 Email: []

Sample addition to Judge screen

Assistant Info

Name: []
 Telephone: () -
 Email: []

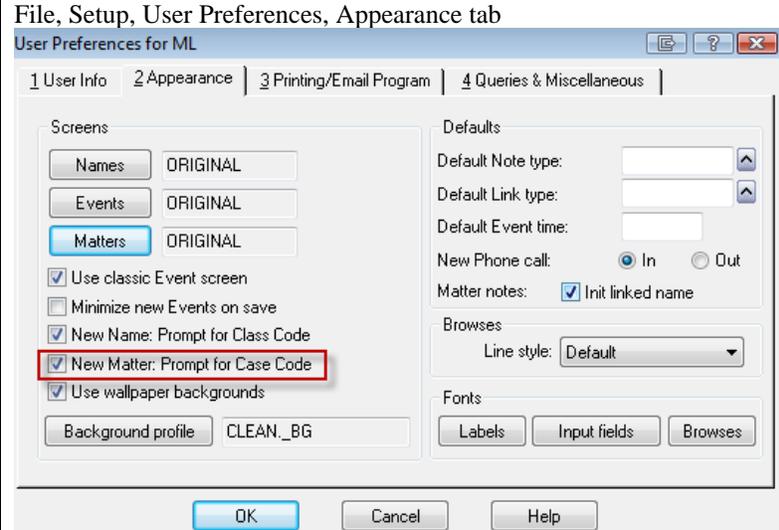
SCHEDULING CLERK INFO

Name: []
 Telephone: () -
 Email: []

III. ADD A NEW MATTER

1. Click on the MATTERS icon
2. To make sure the matter is not already there, click on the Matter column and type name. Or, you can click on the File# column and type a number. If it is not there, go to the next step
3. Click on ADD*
4. Type desired information
5. Click on SAVE
6. To open the new matter on the screen, click on OK (then to link a name, go to step 6 below)

***SMART SCREENS NOTE:** If you are using “smart screens”, make sure you switch on your options (on each person’s desktop) to be prompted for the correct “smart screen”



If you would like to get your Abacus completely customized to your own practice with SMART SCREENS, please follow the directions in your Abacus manual or call EsqWired Computer Consulting for customization – see sample below

Sample Bankruptcy screen

1 Standard		2 Notes		3 Linked Names		4 Linked Events		5 Linked Docs		6 Emails	
Case Code	<input type="text"/>										
Matter	<input type="text"/>										
Last 4 digits of Debtors' SS#	<input type="text"/>										
Hilton Resort Name/Location	<input type="text"/>										
Hilton Acct#	<input type="text"/>										
Our File#	<input type="text"/>										
Attorney	<input type="text"/>										
Case#	<input type="text"/>										
Court	<input type="text"/>										
Chapter	<input type="text"/>										
SOI Statement of Int.	<input type="text"/>										
Ch 13 Plan/Timeshare	<input type="text"/>										
INFORMATIONAL ONLY - please also calendar these dates!											
Petition Date	<input type="text"/>										
341 Meeting	<input type="text"/>										
Proof of Claim Deadline	<input type="text"/>										
Confirmation Hearing	<input type="text"/>										
Discharged	<input type="text"/>										
BK Estate Closed	<input type="text"/>										
		Financial Info									
		Est. Value Timeshare	<input type="text"/>								
		Petition Date Mtg. bal.	<input type="text"/>								
		Petition Date Mtg. arrearage	<input type="text"/>								
		Post Petition Mortgage Amt. Due	<input type="text"/>								
		Petition Date HOA Bal.	<input type="text"/>								
		Post Petition HOA Bal.	<input type="text"/>								
		HRC:									
		Total Bal. Due	<input type="text"/>								
		Monthly Mortgage Payment	<input type="text"/>								
		Total Months Delinquent	<input type="text"/>								
		Total Late Fees	<input type="text"/>								
		HGVC-HQA:									
		Total Bal. Due	<input type="text"/>								
		Earliest HOA Due Date	<input type="text"/>								
		Annual dues payment	<input type="text"/>								
		Total Years Delinquent	<input type="text"/>								
		Total Late Fees	<input type="text"/>								
		Opening/Closing Info									
		MJB Opened	<input type="text"/>								
		MJB Closed	<input type="text"/>								
		MJB Closed #	<input type="text"/>								
		Discharged/Dismissed	<input type="text"/>								

IV. HYPERLINKS (for customized databases)

*If your database has been customized with hyperlinks, you may have two different types of hyperlinks:

1) A name-to-matter link on your matter screen which shows as “NOT LINKED” (this is explained in the previous chapter LINK A NAME TO A MATTER, Step 5 above)



2) A link on your matter or name screen which shows “NOT ASSIGNED”

RULE NUMBER 1 of LINKING – If you have a hyperlink, USE THAT FIRST before you use the method described in the next chapter on “linking names”

How to use the NOT LINKED hyperlink:

1. CLICK on the HYPERLINK
2. A browse screen (names, matters or events) will appear.
3. DOUBLE-CLICK on the desired record
4. Accept the LINK TYPE that shows up – but you may type something more descriptive the in DESCRIPTION (for example, if the description says “Plaintiff 1”, you may also want to type “Driver”), then click on OK

To cancel the name from the hyperlink, you must click on LINKED NAMES and UNLINK the name

How to use the NOT ASSIGNED hyperlink:

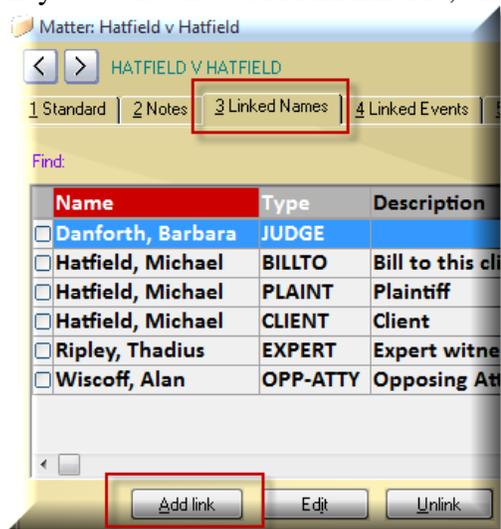
1. CLICK on the HYPERLINK
2. A browse screen (names, matters or events) will appear.
3. DOUBLE-CLICK on the desired record

To cancel this link, right click on it, then click cancel, YES

*To have your screens customized with hyperlinks, please follow the directions in the Abacus manual or call EsqWired Computer Consulting for training/setup of hyperlinks

V. LINK A CONTACT TO A MATTER

1. Click on MATTERS icon
2. Click on desired column heading (MATTER or FILE#) to sort
3. Type desired MATTER name or NUMBER to find
4. Press ENTER when found (if you have HYPERLINKS, see 5 below – if you do not have hyperlinks, go to 6 below)
5. If you have HYPERLINKS, simply click on the hyperlink, then click YES (you will then be in the contacts database – highlight desired contact and click on OK, then OK to the NAME-TO-MATTER link screen.
6. If you do not have HYPERLINKS, click on LINKED NAMES (page 3)

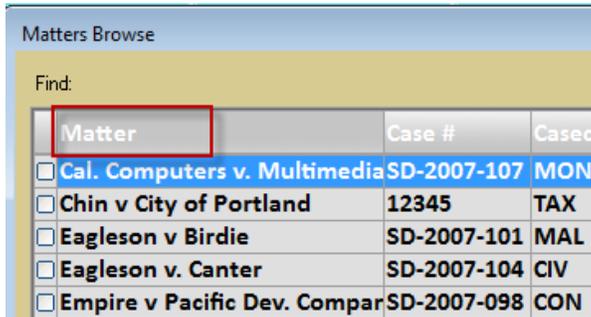


7. Click on ADD LINK
8. To check if the name is already in the rolodex, type the name
9. If it exists, press ENTER and go straight to step 11
10. If it does NOT exist, click on ADD
11. Type desired information and click on SAVE
12. Then click on OK
13. For LINK TYPE, click on arrow and choose appropriate link type, i.e., CLIENT or EXPERT
14. Click on OK
15. You will now be back in the MATTER on page 3.
16. To link another name to this matter, follow steps 6-12 above
17. To choose another matter, start at step 1 again.

NOTE: If you choose the wrong link type in no. 12 above, just click on EDIT and choose another link type

VI. TO FIND A MATTER

1. Click on the MATTERS icon
2. Click on desired column heading (MATTER or FILE#) to sort

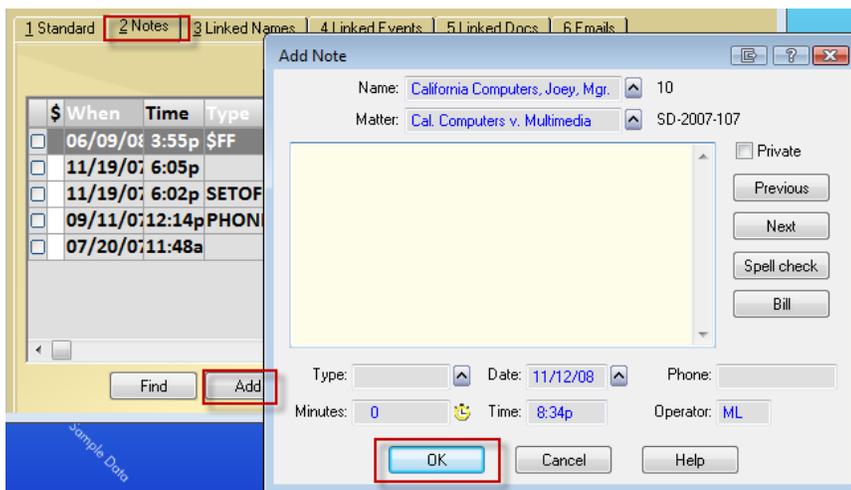


Matter	Case #	Casec
Cal. Computers v. Multimedia	SD-2007-107	MON
Chin v City of Portland	12345	TAX
Eagleson v Birdie	SD-2007-101	MAL
Eagleson v. Canter	SD-2007-104	CIV
Empire v Pacific Dev. Compar	SD-2007-098	CON

3. Type desired MATTER name or NUMBER to find
4. Press ENTER when found
5. If you make any changes, click on SAVE when done
6. To go to another matter, just follow steps 1 through 4 above (no need to close current matter window)

VII. TO ADD A NOTE TO A MATTER

1. Click on MATTERS icon
2. Click on desired column heading (MATTER or FILE # to sort
3. Type desired FILE NUMBER or MATTER name to find
4. Press ENTER when found
5. Click on NOTES (page 2)
6. Click on ADD
7. Type desired note



1 Standard 2 Notes 3 Linked Names 4 Linked Events 5 Linked Docs 6 Emails

\$	When	Time	Type
<input type="checkbox"/>	06/09/08	3:55p	\$FF
<input type="checkbox"/>	11/19/07	6:05p	
<input type="checkbox"/>	11/19/07	6:02p	SETOF
<input type="checkbox"/>	09/11/07	12:14p	PHON
<input type="checkbox"/>	07/20/07	11:48a	

Find Add

Sample Data

Add Note

Name: California Computers, Joey, Mgr. 10

Matter: Cal. Computers v. Multimedia SD-2007-107

Private

Previous

Next

Spell check

Bill

Type: Date: 11/12/08 Phone:

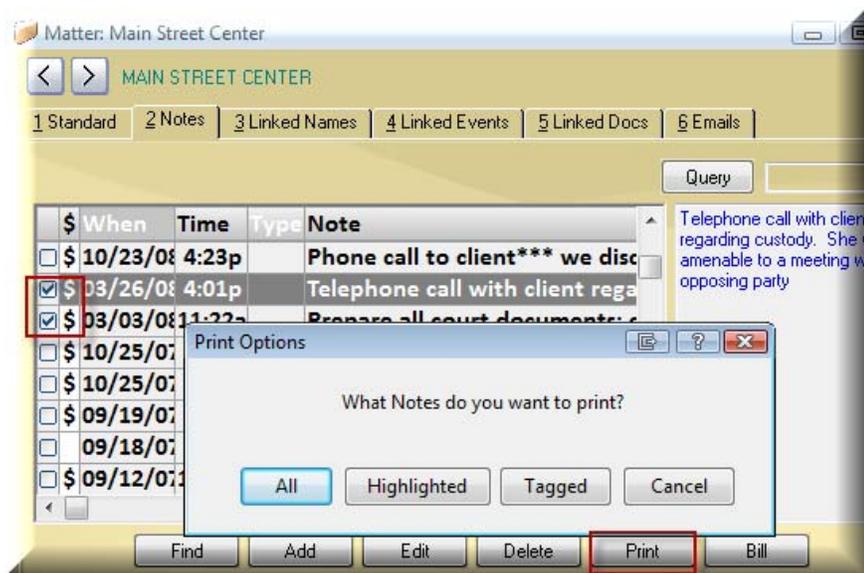
Minutes: 0 Time: 8:34p Operator: ML

OK Cancel Help

8. Click on OK when done (your initials and date will be automatically stamped on the note)

VIII. TO PRINT MATTER NOTES

1. While in the desired MATTER, click on the NOTES page (page 2)
2. Click on PRINT
3. Click on ALL for all the notes, HIGHLIGHTED for the note you are on currently, or TAGGED if you have tagged noted (see check mark on left)



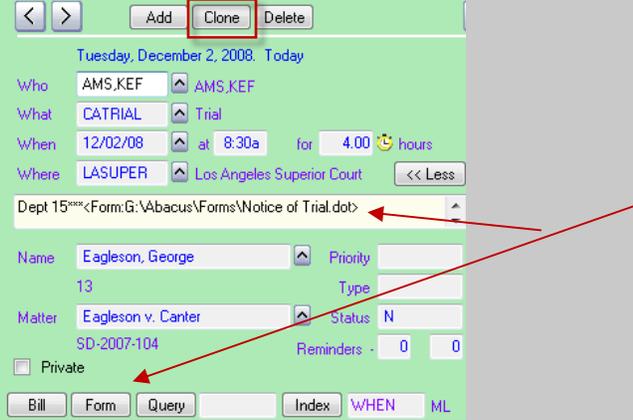
4. Check that OUTPUT TO is set to PRINTER or SCREEN
5. Click on PRINT, OK

IX. TO PRINT A MATTERS OR NAMES REPORT

1. Click on the FILE MENU
2. Click on REPORTS
3. Click on NAMES or MATTERS
4. Click on REPORT
5. Click on desired report, OK
6. If necessary, click on QUERY and choose desired query (filter)
7. OUTPUT TO should be SCREEN to view (then print if desired) or PRINTER
8. Click on PRINT for whichever output option you have chosen
9. Click on OK

If you printed to SCREEN and then want to print to printer, click on the PRINTER icon on the toolbar and click on OK (you may also choose at this point to print only selected pages)

X. TO ADD EVENTS/RULES TO THE CALENDAR

From a matter	From weekly or daily calendar
<ol style="list-style-type: none"> 1. Click on MATTERS icon 2. Type desired FILE NUMBER or MATTER name to find 3. Press ENTER when found 4. Click on LINKED EVENTS (page 4) 5. Right-click on white area and choose ADD EVENT or ADD EVENT FROM A RULE*. 6. TYPE IN DESIRED INFORMATION 7. When done, click on SAVE 8. If you chose a RULE, click on YES to create the related events and wait while Abacus generates the events (if you did not choose a rule, you are now finished) 9. A confirmation screen of all related events will appear – click OK when done 	<ol style="list-style-type: none"> 1. Click on DAILY or WEEKLY calendar icon 2. RIGHT click on desired time, reminder or to-do section 3. Right-click on white area and click on ADD EVENT or ADD EVENT FROM A RULE*. 4. TYPE IN DESIRED INFORMATION 5. When done, click on SAVE 6. If you chose a RULE, click on YES to create the related events and wait while Abacus generates the events (if you did not choose a rule, you are now finished) 7. A confirmation screen of all related events will appear – click OK when done
From monthly calendar	
<p>NOTE on scheduling trials with COUNTY rules First you must schedule the state trial rule (CATRIAL or CATRIAL2). Then ADDITIONALLY, you must schedule the COUNTY rule (TRIAL-LA, TRIAL-OR, etc.) The easiest way to do this is to CLONE the state trial event you just created and change the WHAT to TRIAL-LA (or whichever county as appropriate) then click on SAVE It will look like you have two trials scheduled, but you don't so you must brief the rest of the staff to understand this</p> 	<ol style="list-style-type: none"> 1. Click on MONTHLY calendar icon 2. Right-click on desired day and click on ADD EVENT or ADD EVENT FROM A RULE*. 3. TYPE IN DESIRED INFORMATION 4. When done, click on SAVE 5. If you chose a RULE, click on YES to create the related events and wait while Abacus generates the events (if you did not choose a rule, you are now finished) 6. A confirmation screen of all related events will appear – click OK when done <p>Once you have added the event to the calendar, you may now associate a court form or Word/WordPerfect form letter to be auto-generated from the event.</p> <p style="color: red;">See Chapter on Document Generation for more details</p>

*SEE APPENDIX I for further important help on Abacus rules

XI. TO SCHEDULE A RECURRING EVENT

1. Schedule the first event (the one you wish to recur) as described above
2. RIGHT-click on the review event you wish to recur
3. Click on RECUR
4. Click on DAILY
5. Click on DAYS APART and type 30 or 60 or whatever you want
6. Click on arrow on END DATE
7. Choose a date about a year from now
8. Click on OK and then click on YES and wait for the list to be generated
9. Click on OK to close the list (note: the last event will have a note telling you it is the last in the series - you can then recur that event again a year later if the case is still open)

XII. TO PRINT A CALENDAR REPORT

1. Click on the FILE MENU (top left-hand corner of your screen)
2. Click on REPORTS
3. Click on EVENTS (CALENDAR)
4. Click on REPORT
5. Click on desired report , OK
6. Click on WHO and type initials or leave blank for ALL PEOPLE
7. OUTPUT TO should be either SCREEN to view (then print if desired) or PRINTER
8. Click on PRINT for whichever output option you have chosen
9. Click on OK
10. If you printed to SCREEN and then want to print to printer, click on the PRINTER icon on the toolbar and click on OK (you may also choose at this point to print only selected pages)

XIII. TO EDIT AN EVENT

1. Double-click on the event
2. To edit the event, make desired changes
3. Click on SAVE

NOTE: To **RESCHEDULE** an event on the DAILY, WEEKLY or MONTHLY calendar, simply drag it to a new date or time. OR, right-click on the event and click RESCHEDULE

NOTE: If you edit a rule, then SAVE, you will be asked if you want to update the related events. Click on YES and you will then be taken to each and every event in the rule and asked the same question - click on YES or NO on each event.

NOTE: To **DELETE** an event, click on the event and click on DELETE. If you delete a rule, you will be asked if you wish to delete the related events. Click on YES and all the related events will be deleted.

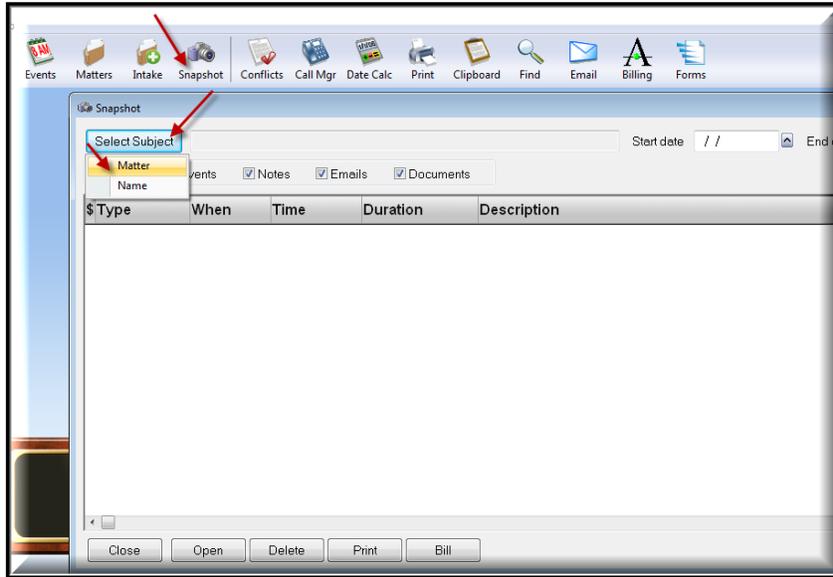
XIV. TO MARK AN EVENT DONE

1. RIGHT-click on the event
2. Click on MARK DONE
3. Click on OK

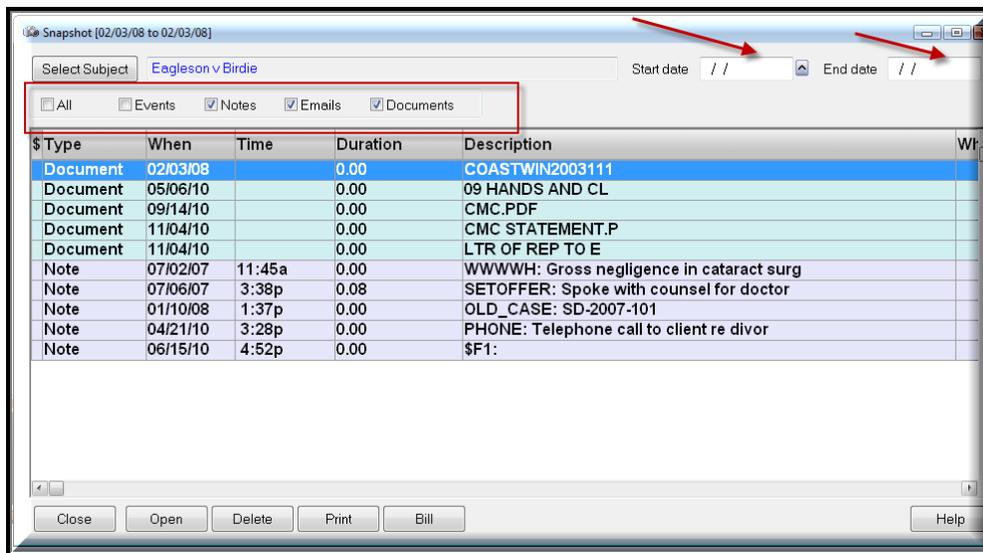
NOTE: If you have made an event a "TO-DO" (you put TO-DO in the TIME field), this event will move forward every day after its due date until you mark it done (or you delete it).

XV. SNAPSHOT

To see a complete picture of your matter, click on SNAPSHOT, then SELECT SUBJECT, MATTER or NAME.



Check off desired boxes depending upon what you want to view (great use of seeing Notes and Emails together on one screen). Also, you can set a date range if desired.



XVI. EXTRA TABS

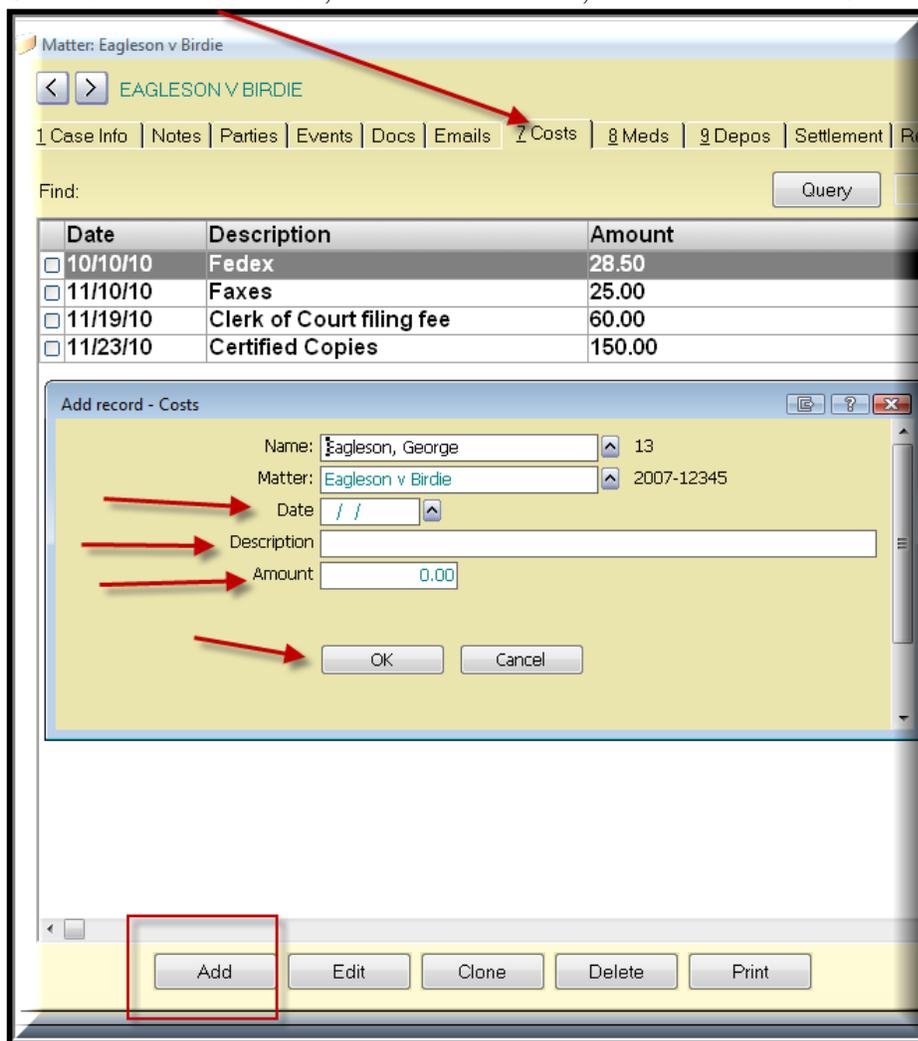
Available in Version V2011 and up only.

By request, you can get extra “databases (tabs) on your Matter or Names screen. This will allow you to have unlimited records (like the NOTES tab) on the subject you desire, like keeping track of costs, medical reports, depos, real estate, etc.

Please call EsqWired Computer Consulting if you would like one or more customized “extra tabs”.

Here’s an example of how it would work:

Click on the “Extra Tab”, then click on ADD, then fill in the fields and click on OK.



Custom reports can be created and printed directly from this screen.

XVII. QUERIES

Queries filter the data so that you see just the records you want to see. For example, you could use a query to see only active clients from the rolodex. Or you could use a query to see all matters with a case type of "MEDMAL". Queries can be used either on-screen to view certain records or with reports to print just the information you want.

You can make a "quick query" or a regular query. Usually quick queries are not saved for permanent use, whereas regular ones are. Regular ones are more complex and require a good working knowledge of Abacus.

To make a quick query to look for all cases with a case type of MEDMAL:

1. Open any matter on to the screen
2. Click on QUERY, QUICK QUERY (at the foot of the matter screen)
3. A blank copy of the screen will appear
4. Click on the CASECODE field (or whichever field you are searching on) and click on MEDMAL
5. Click on OK, then FIRST

NOTE: For more complete information on queries, please see the manual that came with your Abacus program, or call EsqWired Computer Consulting to arrange advanced training. You should have a fairly good knowledge of Abacus (i.e., be familiar with WHAT, WHEN, WHO, etc.) in order to understand more complex queries.

XVIII. DOCUMENT LINKING

Microsoft Word installation (one time operation)

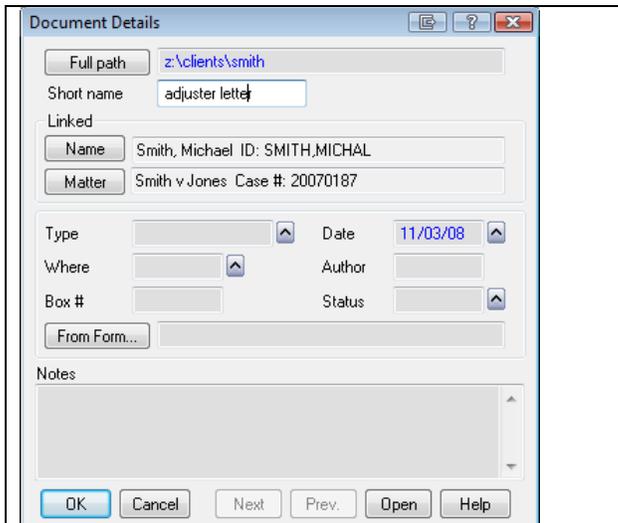
1. Open Word
2. Check security on macros is set to medium or low (Tools, macros, security)
3. Open the file ABINST from the **Abacus** folder and double click
4. The macro is installed
5. Overwrite when prompted - Now the *Save and Log to Abacus* menu is added to your *File* menu

WordPerfect installation (one time operation)

1. To install the macro (one time operation)
2. Start WordPerfect.
3. Click on the TOOLS menu, then *Macro* then *Play*. The Open window appears
4. Browse to the Abacus directory, select the file WP8INST.WCM
5. Select **Install** and click **OK**
6. Exit WordPerfect and restart. Now the *Save and Log to Abacus* menu is added to your *File* menu

To save a document using Save and Log to Abacus menu

1. With a document open in Word, Click the FILE menu then *Save and Log to Abacus*
2. Save the document in the usual way and in the usual place
3. After you have clicked on SAVE, you will then be switched over to Abacus
4. The Document Details window opens

	<p>Note that the above MATTER/NAME is filled out for you – this is not always the case, depending upon whether or not you have a matter opened up in Abacus – however, you can always click on MATTER and pull in the desired matter yourself (and the NAME is not that important unless you want the document linked to a specific name also). You may want to add TYPE, Author, or notes.</p>
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5. Click **OK**. The document record is linked to the name and/or matter.

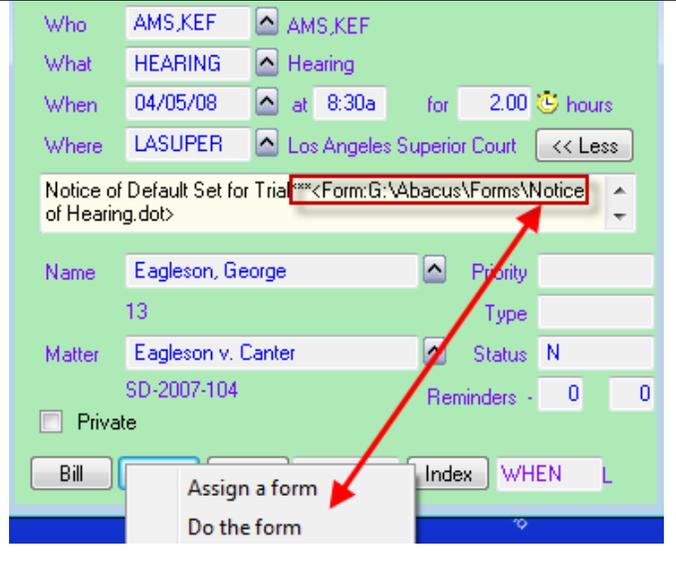
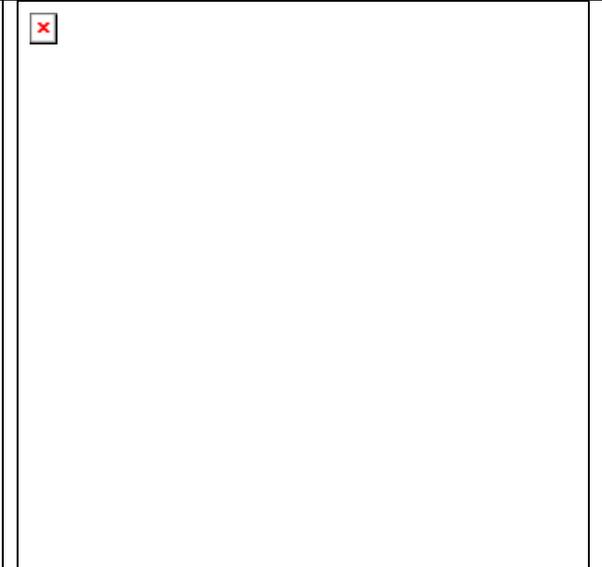
XIX. DOCUMENT GENERATION

There are various ways to send information from Abacus to Word, WordPerfect or Abacus forms – a few of the word processing options are explored here. For word processing, you must set up your forms with the Abacus merge codes ahead of time (instructions are included below) and then you can

- 1) Send a calendar event’s information to your word processor – e.g., a Notice of Depo or Trial, or a Case Management Conference Statement to Abacus forms
- 2) Send a notice or letter to a CONTACT or LINKED contact from a matter
- 3) Do a mail merge of dozens or hundreds of names (Christmas card labels, marketing letters, etc) (there are no instructions for this included in this manual)

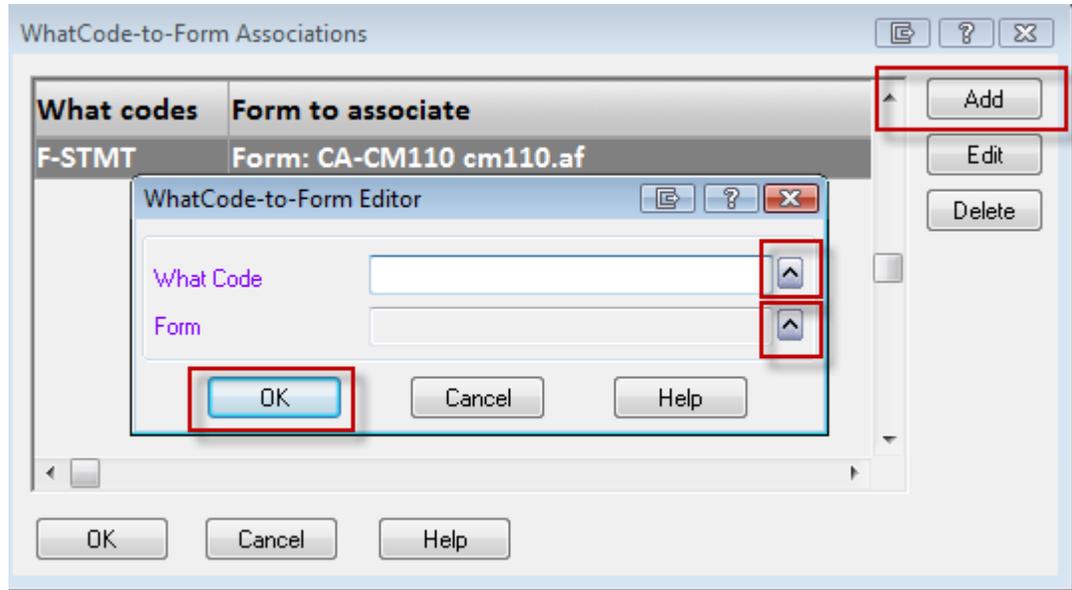
Send a document from an event to word processor

Note that you can EITHER pre-assign the form to the WHAT code (see below for instructions), or assign the form on the “fly”, then “do the form”

<ol style="list-style-type: none">1) Fill out the event screen as usual and save2) Click on Do the Form	<ol style="list-style-type: none">3) Your form is generated a few seconds later (everything in gray came from Abacus)
 <p>The screenshot shows the Abacus software interface for creating an event. The event details are as follows:</p> <ul style="list-style-type: none">Who: AMS_KEFWhat: HEARINGWhen: 04/05/08 at 8:30a for 2.00 hoursWhere: LASUPER (Los Angeles Superior Court)Name: Eagleson, GeorgeMatter: Eagleson v. CanterSD-2007-104 <p>A dropdown menu is open over the 'Do the form' button, showing the option 'Assign a form'. A red arrow points from this option to the 'Form:G:\Abacus\Forms\Notice' entry in the event's 'What' field.</p>	 <p>A placeholder box with a red 'X' icon, indicating where the generated document will appear.</p>

Pre-assign a document to a WHAT code:

Click on FILE, SETUP, WHAT CODES TO FORM and click on the arrow on right to choose a “what” code. Then click on the arrow to the right of FORM and choose a form from your forms folder (assuming you have set up your merge forms), or Abacus forms library, then click OK, OK when done

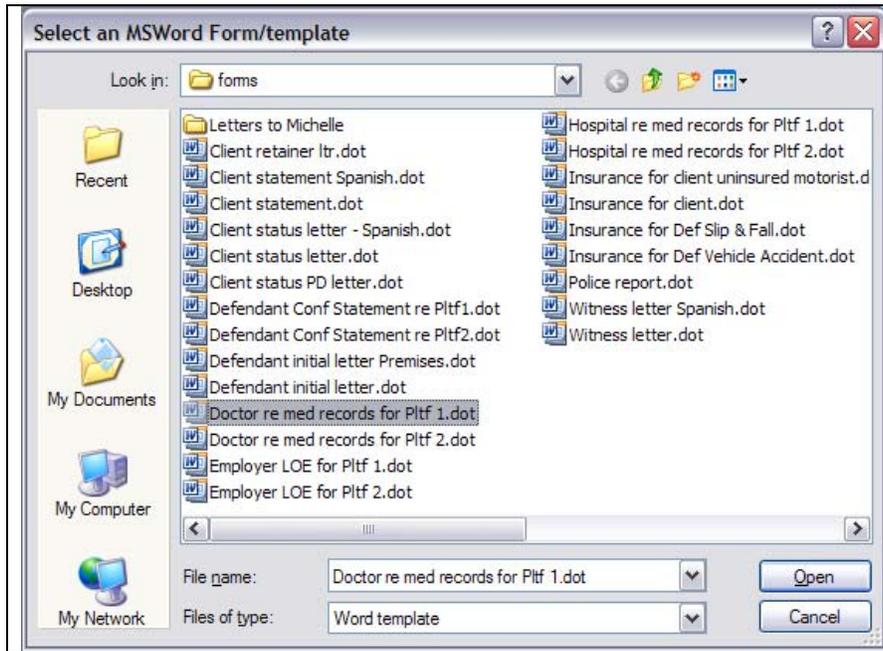


Send a document from a linked name in Abacus

1. In Abacus, open desired matter. Click on LINKED NAMES and highlight the name of the person you are writing to
2. Click on the PRINTER icon on your toolbar, FORM GENERATION, WORD

NOTE:
The list below “Form Generation” remembers the last 10 templates you ran – you can click on the list instead of going to “MS WORD” if you see the desired template

3. A list of your documents should appear* – double click on desired document and it will open in your word processor.



*These documents must be set up with merge codes. Please see “create a new template” below or call EsqWired Computer Consulting for merge setup

4. Edit, save and print in the usual way

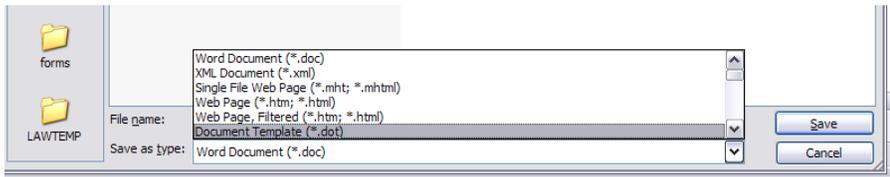
Edit an existing template

1. In Microsoft Word, open the desired template from \Abacus\forms (or wherever you have saved them)
2. Edit and save in the usual way

Create a new template

Method A: use this method if you want to create a new merge template

1. In Microsoft Word, create or open an existing document
2. Click on FILE, SAVE AS, and give it a name. Then below the name, SAVE AS TYPE should be a document template (.dot for 2000/2003 or .dotm for Word 2007)



Word will then take you to the default template folder – this is NOT where you want to save the template – browse to \Abacus\forms (or wherever you want to save it) and save it there. Close the template

3. Now go to Abacus and open any matter with linked names to use as a sample. Click on the PRINTER icon on the toolbar and click on FORM GENERATION, CREATE MS WORD FORM
4. Double click on desired form
5. You will then be switched to Word. Click in the document at the place where you want to insert the Abacus field. Then click on the INSERT MERGE FIELD button on your merge toolbar



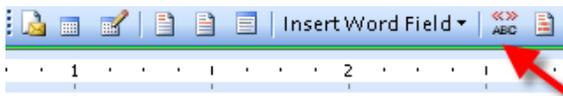
6. Double click on desired field



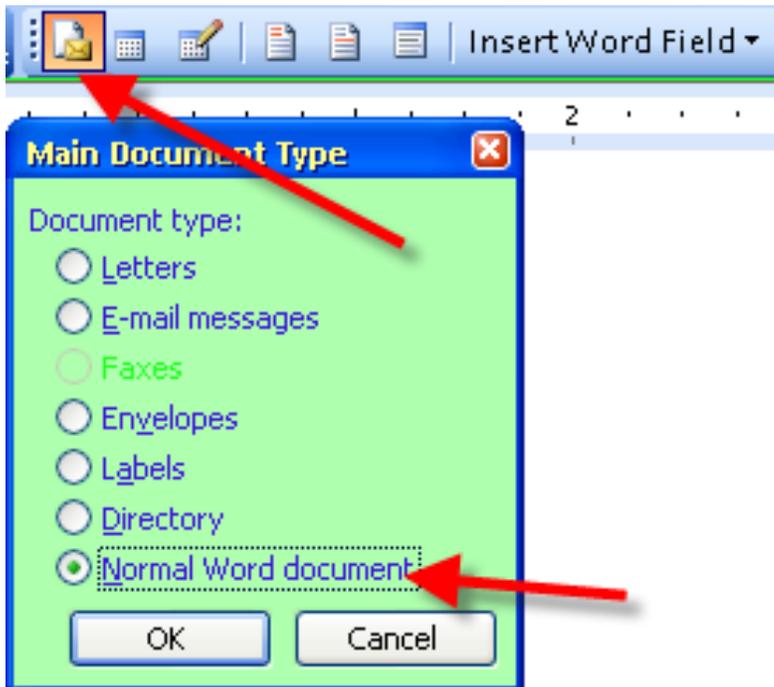
- Click on CLOSE* and move your cursor to the next place where you want the next Abacus field

	<p>NOTE: if you are sending data from Abacus by highlighting any of the names from LINKED NAMES, use CONTACT fields, not CLIENT fields</p>	<p>*Note: if you intend to do merge setup yourself, please contact EsqWired Computer Consulting to get a free add-in for Word that allows you to pull <i>multiple</i> merge fields into your document without closing the “insert merge field” box (unlike the one that comes with Word, where you have to insert a field, close the box, move to the next spot in your document and repeat).</p>
--	--	--

- To test the new template and view data instead of codes, click on the ABC button on your merge toolbar (you can click back on the ABC button to go back to viewing the merge codes). If your data doesn't look right (i.e., the “Dear” greeting is missing), first check that the data actually exists in Abacus.



- Turn the document back into a “normal Word document” before closing and saving



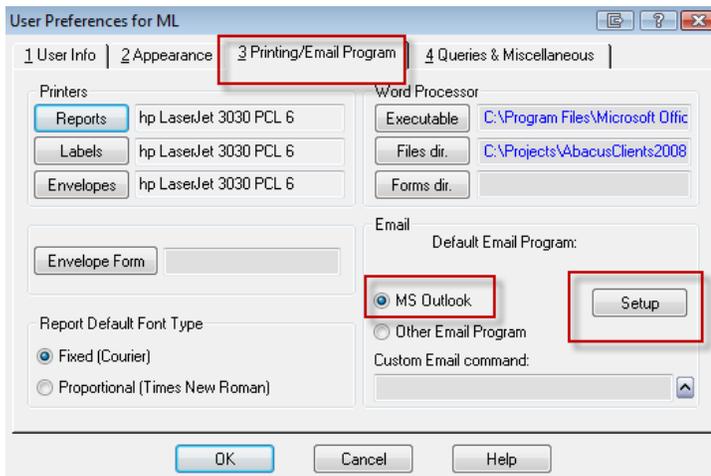
Method B: use this method if you want to base a new template on one you previously made

1. In Microsoft Word, go to the \Abacus\forms folder and open an existing template (you are going to base the new template on the format of the one you choose)
2. Click on FILE, SAVE AS, and give it a new name
3. Delete whatever TEXT of the new template you don't want (not the MERGE codes!)
4. Type the text you do want (or open an existing document and copy and paste the text from it).
5. Save and close when done

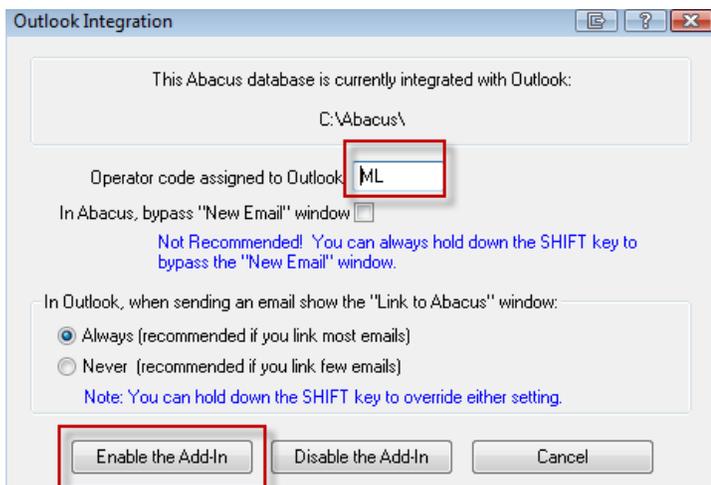
XX. LINK TO OUTLOOK

One time setup:

1. Close Outlook
2. In Abacus, click on FILE, SETUP, USER PREFERENCES
3. Click on the PRINTING/EMAIL PROGRAM tab
4. Click on MS OUTLOOK then SETUP

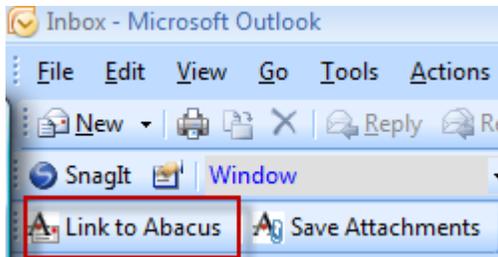


5. Type your initials and click ENABLE THE ADD-IN

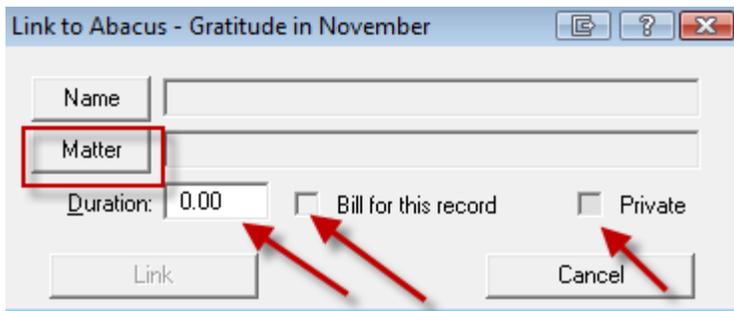


6. Using the link for incoming emails
7. Highlight the email in the inbox (don't open it)

8. Click on LINK TO ABACUS



9. Click on MATTER and highlight desired matter (if you are using the Abacus billing program, enter the duration and click BILL FOR THIS RECORD) (and/or make it PRIVATE), then click on LINK



Using the link when sending an email

1. Click on SEND DON'T link or click MATTER and highlight desired matter (if you are using the Abacus billing program, enter the duration and click BILL FOR THIS RECORD) (and/or make it PRIVATE)
2. Same as 3 above, but click on LINK AND SEND or GO BACK if you change your mind

XXI. INTRO TO COURT FORMS

Court forms are by subscription (much like Legal Solutions). Or you may download fillable PDFs from the web and insert them into the forms program, and link some of the fillable fields to Abacus. Please contact EsqWired Computer Consulting for details on either of the above options.

Set up your “My Firm” record and attorney bar numbers:

1. Create a contact record for your firm, save and close it. This record’s address, together with the name you registered your firm under (when you purchased Abacus), will be sent to the Attorney section at the top of each form

2. Then click on File, Setup, My Firm and click on the record you just created, OK
3. If you are a firm attorney, go to File, Setup, User Preferences, enter your Bar Number

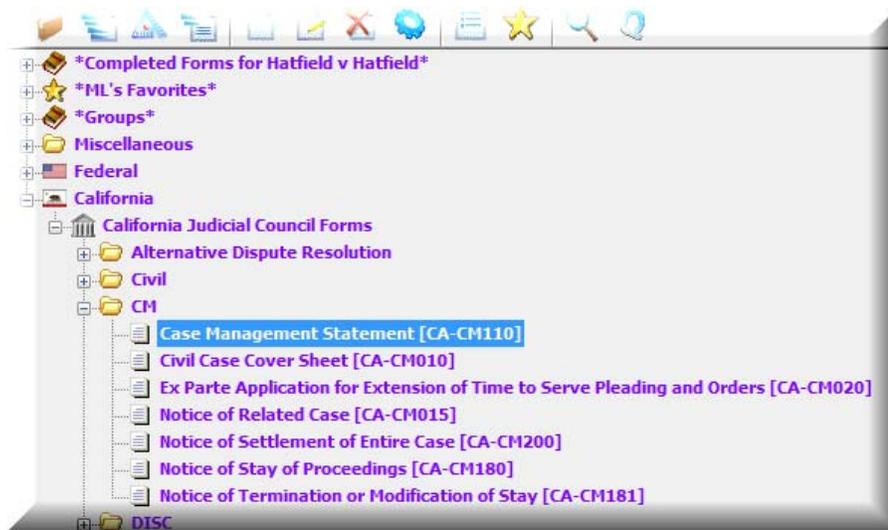
Make sure your names you want to send to the forms are linked (for Family Law, you would link RESP and PET instead of PLAINT and DEF):

Name	Type	Description
<input type="checkbox"/> Danforth, Barbara	JUDGE	
<input type="checkbox"/> Hatfield, Michael	BILLTO	Bill to this client
<input type="checkbox"/> Hatfield, Michael	PLAINT	Plaintiff
<input type="checkbox"/> Hatfield, Michael	CLIENT	Client
<input type="checkbox"/> Pirelli, Anthony	DEF	Defendant
<input type="checkbox"/> Ripley, Thadius	EXPERT	Expert witness
<input type="checkbox"/> Wiscoff, Alan	OPP-ATT	Opposing Attorney

1. Click on the FORMS icon on your toolbar



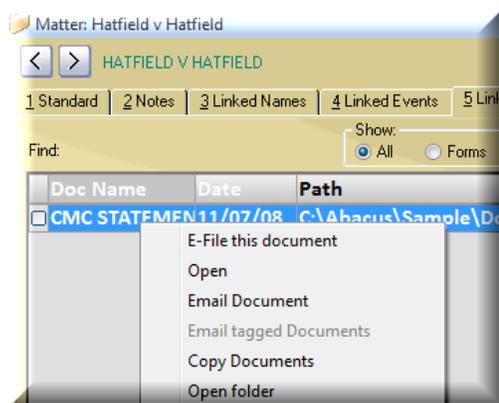
2. Double click on desired form



3. Your Abacus data – firm information, attorney and bar number, court, plaintiff and defendant, etc., will be filled out from Abacus and then you fill the remainder of the form in the usual way,

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and SC#) Arthur Simon, Bar # 123456 LAW OFFICES OF ARTHUR SIMON 123 4th Street Los Angeles, California 90014 TELEPHONE NO.: (213)123-1234 FAX NO. (Optional): () - E-MAIL ADDRESS (Optional): ATTORNEY FOR (Name): Michael Hatfield		FOR COURT USE ONLY	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF Los Angeles STREET ADDRESS: 9355 Burton Way MAILING ADDRESS: 9355 Burton Way CITY AND ZIP CODE: Beverly Hills 90210 BRANCH NAME: Beverly Hills Courthouse			
PLAINTIFF/PETITIONER: Michael Hatfield DEFENDANT/RESPONDENT: Anthony Pirelli			
(Check one): <input type="checkbox"/> UNLIMITED CASE (Amount demanded exceeds \$25,000)		<input type="checkbox"/> LIMITED CASE (Amount demanded is \$25,000 or less)	
		CASE NUMBER: 1234567	

4. Print the save the document to your client's folder. It will be automatically linked to the matter in Abacus where you can edit it, reprint it, email it, etc.



XXII. INTRO TO PATHAGORAS DOCUMENT ASSEMBLY

If you do not currently own this program, please Contact EsqWired Computer Consulting for a free demo of this program. Pathagoras integrates with Microsoft Word and therefore any documents you send from Abacus to Word can be further assembled using Pathagoras. If you'd like to download a 90 trial of Pathagoras, please visit www.Pathagoras.com.

Here's what the Pathagoras menu looks like – it's simply a toolbar in Word



This program can be used in conjunction with Document Generation on Page 16 of this manual.

PRONOUNS AND VERBS IN PLEADINGS

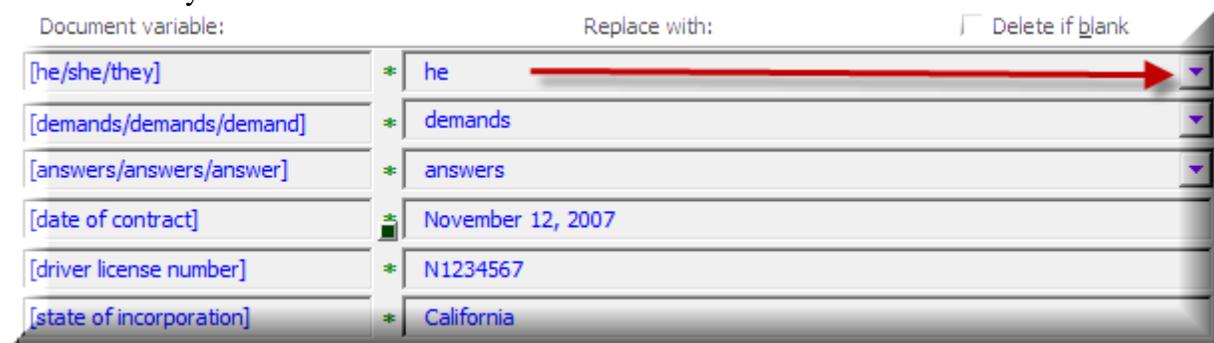
If you have any existing documents where you wish to choose between MASCULINE, FEMININE OR PLURAL pronouns and verbs, simply make a bracketed list in the appropriate spot in your document:

[he/she/they] [demands/demands/demand] [answers/answers/answer]

Although with merging, you can send ANY Abacus data to your documents, there will always be data to type (like the above pronouns and verbs). For example, date of contract, driver license number, state of incorporation, etc. Again, you simply make a bracketed “variable” to take care of these:

[date of contract] [driver license number] [state of incorporation]

Upon pressing ALT-D, Pathagoras will automatically gather up all the bracketed “variables” and open a screen to allow you to type your choices and look at the “pull-down” lists that were created for any of the “variables”



Here is your first “he/she/they” pulldown:



SAVE YOUR ANSWERS SO YOU NEVER HAVE TO TYPE THEM AGAIN

Click on NEXT when done and Pathagoras will ask you if you want to save the “answers” you just typed, so that the next time you need some or all of those answers for another document, you just press ALT D in that document, click on the pulldown list and click on the client you desire



GROUP “VARIABLES” SO YOU DON’T HAVE TO ANSWER MORE THAN ONCE

To further simplify the assembly of the document when combined with merge codes from Abacus and “variables”, you can turn your list “variables” into “group variables” - this will allow you to assemble your documents even faster, usually in just a FEW SECONDS.

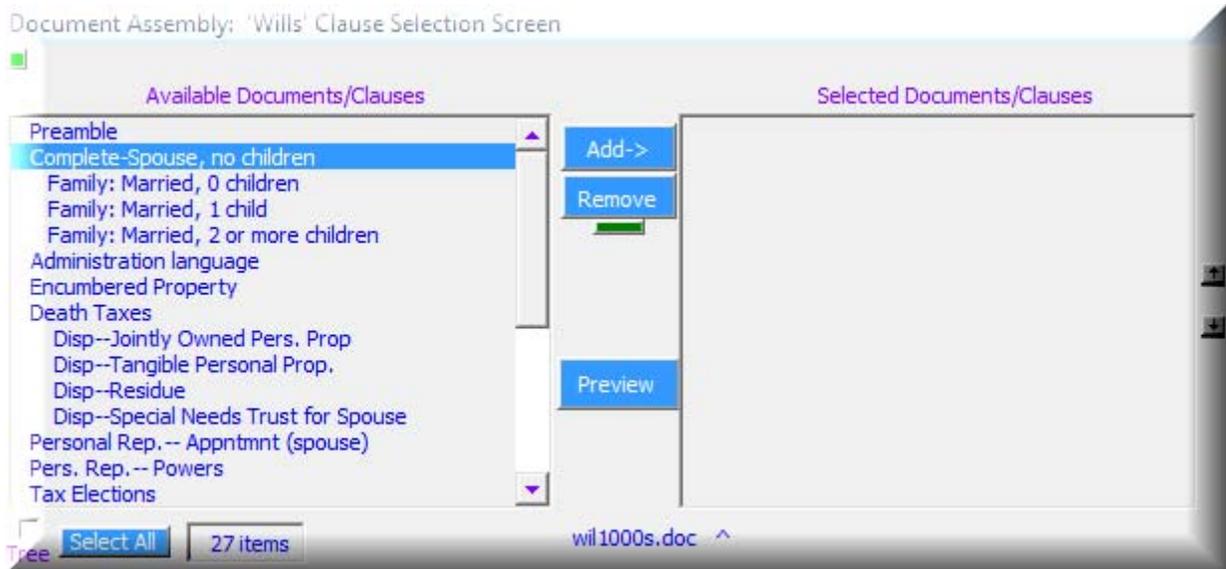
For example, let’s say that the “[he/she/they] [demands/demands/demand] [answers/answers/answer]” refers to the Defendants and you don’t want to have to answer all three (or thirty three) questions pertaining to pronouns and verbs. Create a group:

[!def!he/she/they] [!def!demands/demands/demand] [!def!answers/answers/answer]

Now when you press ALT D and answer just ONE of the group variables, Pathagoras will automatically know ALL of the group’s variables and answer them for you.

ASSEMBLING A DOCUMENT FROM EXISTING LIBRARY OF PHRASES/DOCUMENTS

Assemble a document (wills, trusts, etc.) from scratch (and here’s where you can also use documents with Abacus data): highlight desired document/clause on the left and click ADD to move it to the right. Once you have all the phrases you want, click on NEXT and your document is assembled



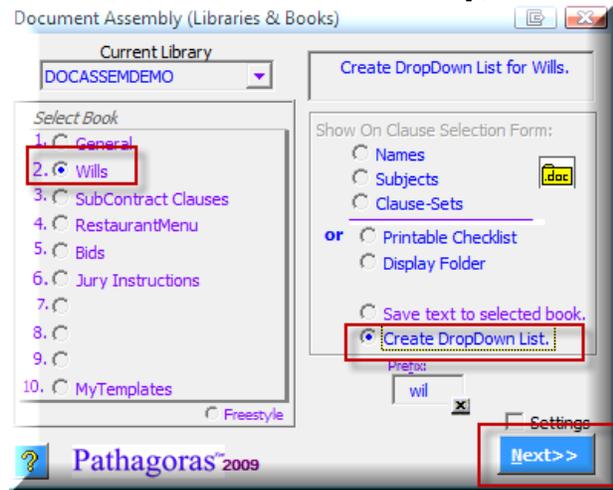
DROP DOWN LISTS OF YOUR PHRASES/DOCUMENTS

This library of phrases could also be made into a drop-down list in Word, thus allowing you to go through an existing document and “drop” the phrases into it wherever you pleased:

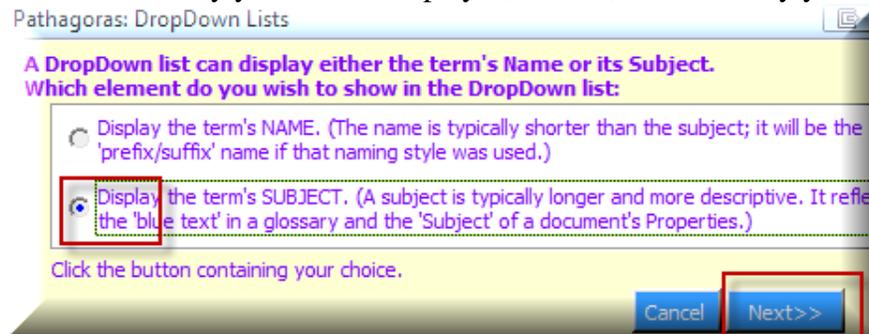
To create a drop down list from a library, click on the Pathagoras document assembly button on the toolbar



Click on desired “book” from library, click on CREATE A DROPDOWN LIST, NEXT



Click on the way you want it displayed, NEXT, click the way you want it sorted, NEXT



And, voila, a drop down list appears on your Word toolbar area (notice you can have multiple drop-down lists – see Jury Instructions right next to it).

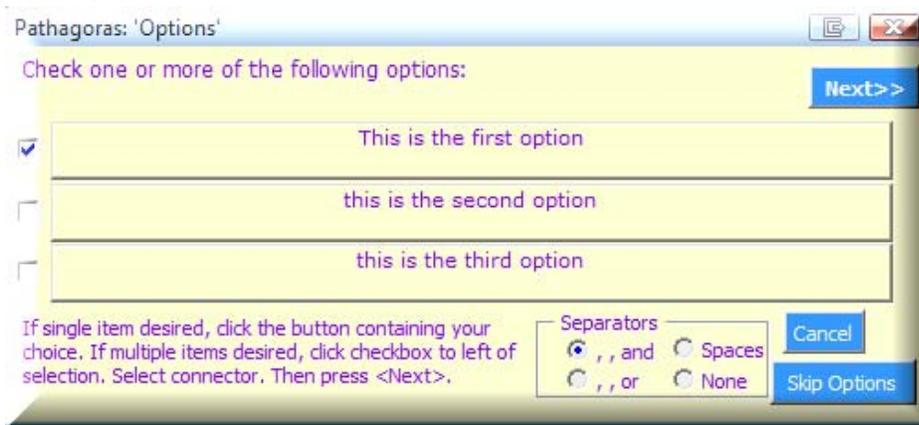


CREATE OPTIONS LISTS

This can be typed by hand or taken from an existing document:

<<*Options*This is the first option/this is the second option/this is the third option>>

The result:



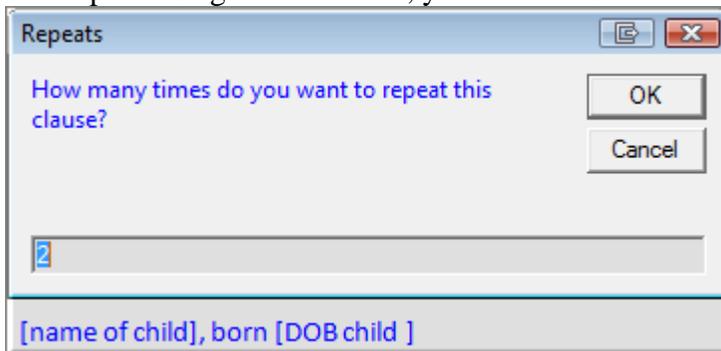
Options can be “one or more” or “just choose one” And they can be whole paragraphs or multiple paragraphs per option

REPEAT VARIABLE (UNKNOWN NUMBER OF TIMES)

Example: you have one or more children plus their date of birth:

<<*repeat*[name of child], born [DOB child]>>

When processing the document, you will be asked for the number:



Pathagoras will then create the bracketed “variables” for you (which is a good thing, otherwise your eyes would completely glaze over and your brain shut down if you had to do this yourself!).
Result: [name of child@1], born [DOB child @1] [name of child@2], born [DOB child @2]

There are many other great features – see www.pathagoras.com/help/

APPENDIX 1 – Understanding Abacus rules

State (Civil Litigation) Rules

There are 58 counties in California. Most, not all, have their own local (Fast Track) rules. **These are the only rules** where you **may** have to calendar both the local county (Fast Track) rule and the generic CACCP rule and only in two instances (for filing a Complaint or calendaring a Trial).

NOTE: Not all counties have a Complaint and/or Trial rule.

RULE CODES:

Generic CCP/Rules of Court set starts with **CA** (e.g. **CATRIAL, CACMC**)

CAAMDCMP	Amended Complaint Filed
CAARBHRG	Arbitration Hearing (CCP1282)
CAARBLST	Date List of Arbitrator Names Mailed (CRC1605)
CAARBPET	Filed Petition - Arbitration (CCP1290)
CAARBTRN	Arbitration Hearing (CCP1141/CRC1600)
CAATTACH	Hearing on Writ of Attachment
CACMC	Case Management Conference
CACMC2	Case Management Conference: (Abridged Version)
CACOMP	Filed Complaint
CACOMP/S	Complaint Served
CACOMP2	Filed Complaint (Abridged Version)

Local rules are either **F-##(initials of county)COMP** (e.g. **F-LACOMP**)

F-KECOMP	Filed comp: Kern
F-KICOMP	Filed comp: Kings
F-LACOMP	Filed comp: Los Angeles
F-LKCOMP	Filed comp: Lake

or **TRIAL-##(initials of county)** (e.g. **TRIAL-LA**)

TRIAL-KE	Trial: Kern
TRIAL-KI	Trial: Kings
TRIAL-LA	Trial: Los Angeles
TRIAL-LK	Trial: Lake
TRIAL-LS	Trial: Lassen

Federal (Litigation) Rules

There are 4 Federal District courts in California. They are the Northern, Southern, Central and Eastern Divisions and they all have their own local rules.

The *District (local)* court rules are "**self-contained**". **You only use the generic Federal rules for whatever you don't find in the local District court rules**, like for discovery, or if there was no Trial rule etc. So, if you need to calendar a trial in the Central District, you would FIRST look for the local rule code **FCCATRL**. If there isn't one, you would use the generic **FDTRIAL** rule. Same goes for the complaint rule and the motion rule and the MSC rule etc.

RULE CODES:

Generic Federal set starts with *FD*

FDACOMP	Amended Complaint Served (FRCVP15): Federal
FDADMIN	Admin Agency Order (FRAP15): Federal Appeal
FDAMTN	Appellate Crt Mtn Filed (FRAP27): Federal Appeal
FDCDSCVR	Date Set for Discovery Conference: Federal
FDCNDEM	Filed Complaint for Condemnation: Federal

District court for California starts with:

FCCA for Central

FCCABILL	Bill of Costs Filed(LR54): Central
FCCAMTN	Filed Notice of Motion (LR6-1): Central
FCCANRC	Filed Notice of Related Case (LR83.1.3): Central
FCCAPFC	Pre-Filing Conference (LR37-1): Central
FCCATRL	Trial: Central

FECA for Eastern

FECASTAT	Hearing of Status Conference (LR16-240): Eastern
FECASTIP	Stipulation/Order for VDRP Referral Filed: Eastern
FECATRL	Trial: Eastern
FECAVDRP	Notification of VDRP Received (LR16-271): Eastern
FEWIMSJ	Served Mtn for Summary Judgment (LR7.1): Eastern

FNCA for Northern

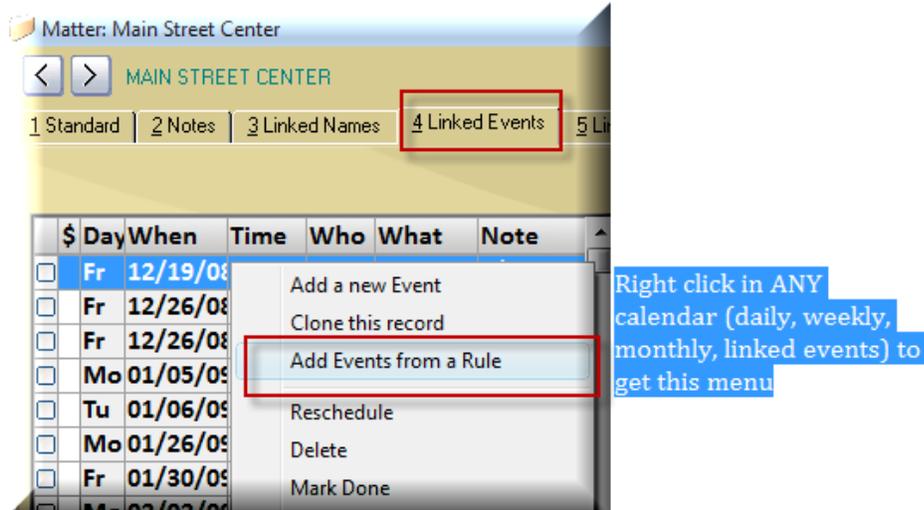
FNCANPA	Filed Notice-Pendency of Action (LR3-13): Northern
FNCANRC	Filed Notice of Related Case (LR3-12): Northern
FNCAREC	Review of Administrative Record (LR16-5): Northern
FNCATIME	Filed Mtn-Enlarge/Shorten Time (LR6-3): Northern
FNCATRL	Trial: Northern

FSCA for Southern

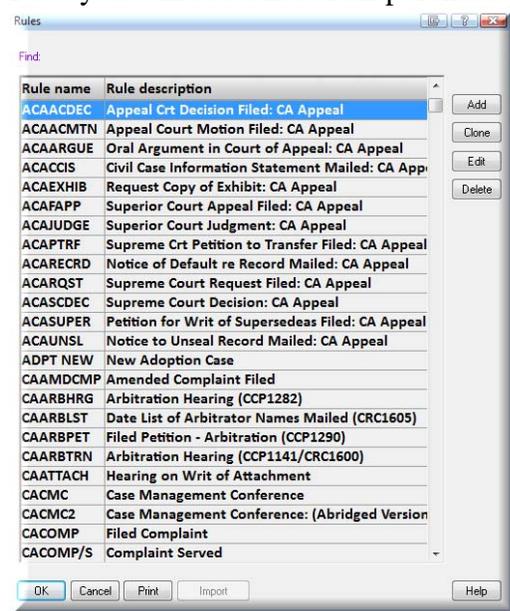
FSCACOMP	Filed Complaint: Southern
FSCAENE	Early Neutral Eval. Conference (LR16.1): Southern
FSCAMTN	Hearing of Motion (LR7.1): Southern
FSCAPTH	Pre-Trial Hearing (LR16.1): Southern
FSCATRL	Trial: Southern

Very best way to schedule a rule

Since many people get confused between a “what” and a “rule” (rules are actually “what” codes that generate multiple other “what” codes), the *very best way to schedule a rule* is not to use “ADD” but to use “ADD EVENTS FROM A RULE” (you can get this by right clicking in any calendar window or using the EVENTS menu at the top of Abacus). This way, you are looking ONLY at rules.



Now you will see a list of all purchased rules in Abacus



To find the rule you want just start typing, e.g. CAM (for CAMOTION) or FC (to see all Federal Central). And then just double click on the one you want and fill in the event screen as usual.

Please see chapter 10 for step by step instructions on entering rules into the Abacus calendar

APPENDIX II – Adding local/state holidays

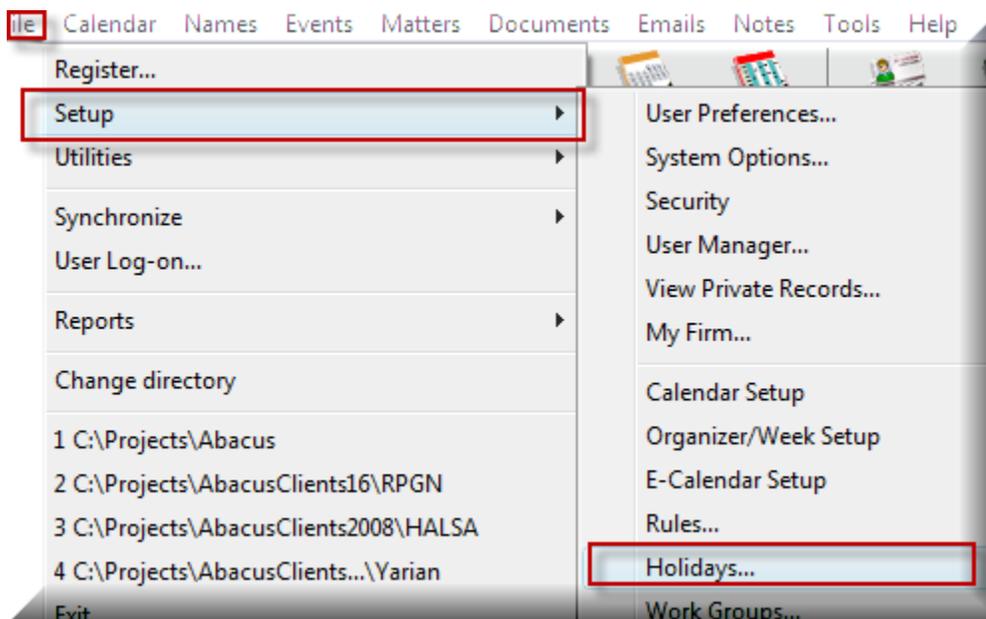
Most states have local holidays (like California’s Cesar Chavez) when the court is closed.

You should be adding those by hand to Abacus as far in advance as you can, **then adding a reminder to Abacus to get those holidays in every year.**

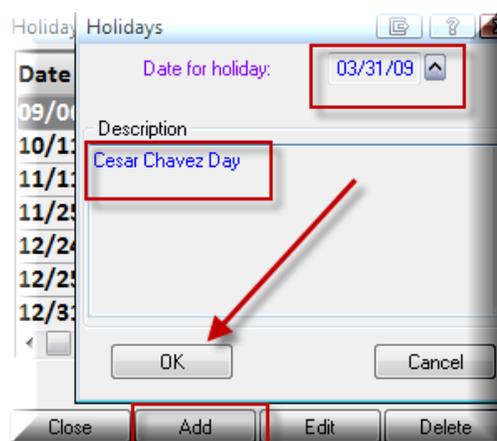
Please note that all Federal holidays are in Abacus for a certain number of years, but you must add LOCAL holidays yourself

To add LOCAL holidays

1. Click on FILE, SETUP, HOLIDAYS

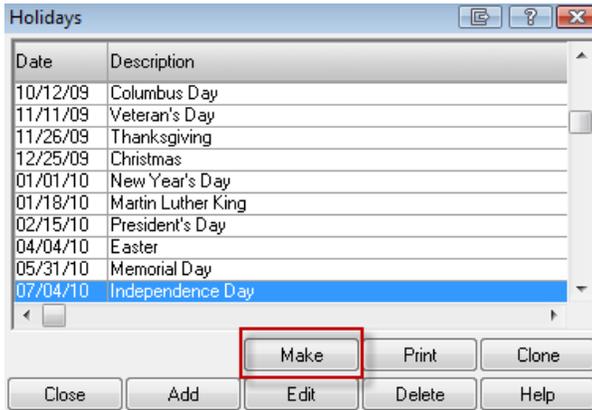


2. Click on ADD
3. Then type the date and description and click on OK

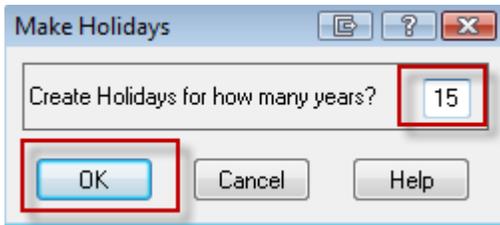


To add more years of FEDERAL holiday, scroll to the end of the list to find out when the holidays end and if you need more:

1. Click on MAKE



1. Type the number of years desired, then click OK



2. Click on CLOSE when done