

Abacus for Smarties

For people smart enough to use Abacus Law

SAVE YOUR DOCUMENTS AND LOG THEM IN ABACUS

BY

Certified Abacus Partner

Michelle Lyons

EsqWired Computer Consulting

P.O. Box 34653

Los Angeles, CA 90034

Tel: (310) 994-0800

GetTrained@EsqWiredConsulting.com

www.EsqWiredConsulting.com

Table of Contents

Microsoft Word 2003 installation (one time operation)	3
Microsoft Word 2007 installation (one time operation)	3
WordPefect installation (one time operation)	4
To save a document using Save and Log to Abacus menu	5
Editing the document once you have used Save/Log	6

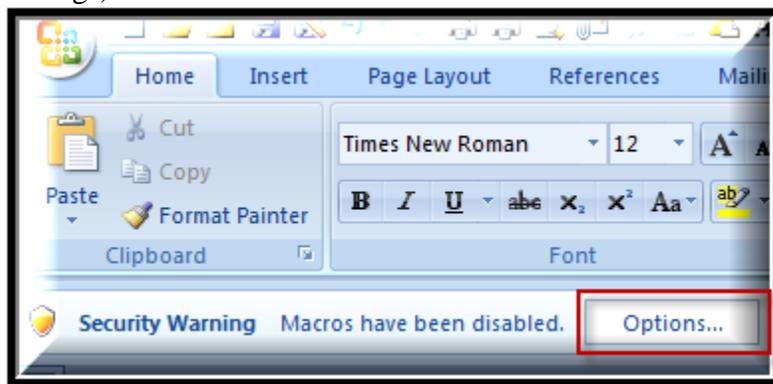
The following will add an item to the FILE or OFFICE BUTTON menu of Word or WordPerfect called “Save and Log to Abacus”

Microsoft Word 2003 installation (one time operation)

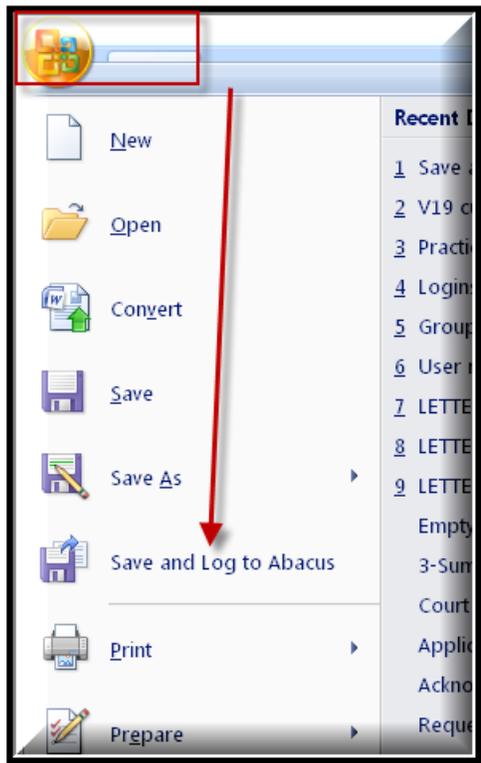
1. Open Word
2. Check security on macros is set to medium or low (Tools, macros, security)
3. Open the file ABINST from the **Abacus** folder (located on one of your server’s drive or your C:\Abacus drive if you are a single user) and double click
4. The macro is installed
5. Overwrite when prompted

Microsoft Word 2007 installation (one time operation)

1. Open Word
2. V2008: Open the file AbacusWordMacros.dotm from the **Abacus** folder (located on one of your server’s drive or your C:\Abacus drive if you are a single user) and double click
V2010: go to Abacus\V19\Programs\AbacusWordMacros.dotm and double click
3. If you get a security warning, at the top of the document, select Options, then 'Enable this Content' (note: if you don’t get this message, click the Office Button, Word Options, Trust Center, Trust Center Settings and change the macro security settings)



4. Click OK if prompted and the macro is installed
5. Exit from Word and then re-enter. You will find the macro on the Office Button menu with the other Save options



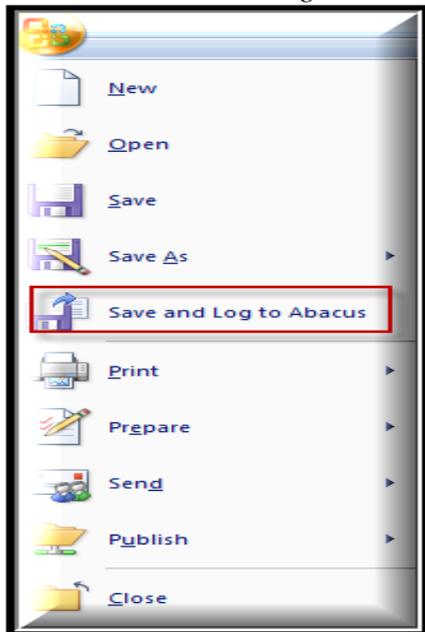
WordPerfect installation (one time operation)

To install the macro (one time operation)

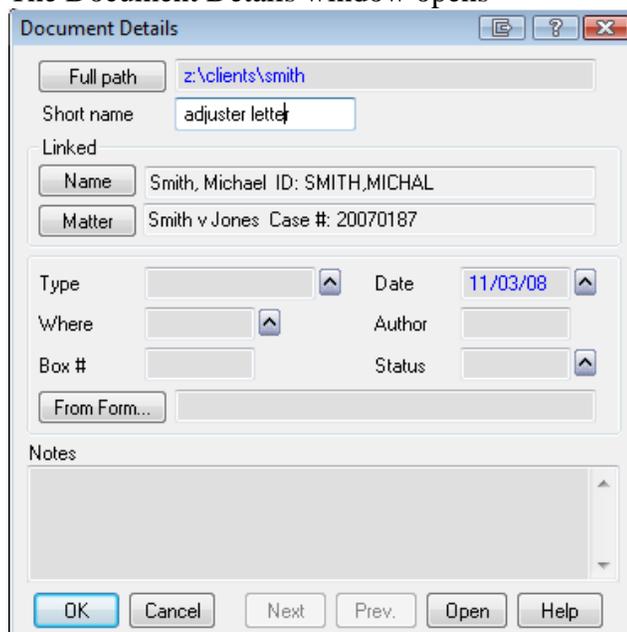
1. Start WordPerfect.
2. Click on the TOOLS menu, then *Macro* then *Play*. The Open window appears
3. Browse to the Abacus directory (located on one of your server's drive or your C:\Abacus drive if you are a single user), select the file WP8INST.WCM
4. Select **Install** and click **OK**
5. Exit WordPerfect 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

With a document open in Word/WordPerfect, Click the FILE or OFFICE BUTTON menu then *Save and Log to Abacus*



1. Save the document in the usual way and in the usual place
2. After you have clicked on SAVE, you will then be switched over to Abacus
3. The Document Details window opens

A screenshot of a 'Document Details' dialog box. The window has a title bar with 'Document Details' and standard window controls. It contains several input fields and buttons. The 'Full path' field contains 'z:\clients\smith'. The 'Short name' field contains 'adjuster letter'. The 'Linked' section has a 'Name' field with 'Smith, Michael ID: SMITH,MICHAL' and a 'Matter' field with 'Smith v Jones Case #: 20070187'. Below this are fields for 'Type', 'Date' (11/03/08), 'Where', 'Author', 'Box #', and 'Status'. There is a 'From Form...' button. At the bottom is a 'Notes' text area and a row of buttons: 'OK', 'Cancel', 'Next', 'Prev.', 'Open', and 'Help'.

4. 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).
5. Click **OK**. The document record is linked to the name and/or matter.

Editing the document once you have used Save/Log

1. Simply double click on the document in the Linked Document screen and it will open up in Word or WordPerfect
2. Make any edits as usual
3. Save as usual