PCLaw™ Link Setup Guide

for Time Matters® 9.0 and Billing Matters® 9.0

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PCLaw Link Setup

This chapter is used to assist administrators and/or persons responsible for setting up the PCLaw™ Link for Time Matters®. It also provides users with the procedures required to install the PCLaw Remote Client, hereafter referred to as the Remote Client.

Time Matters and PCLaw communicate via the PCLaw Link. In some situations, a user may have both Time Matters and PCLaw installed on the computer. In this case, the PCLaw Link can be utilized to communicate between the Time Matters and PCLaw applications. To setup the PCLaw Link, go to *Setting Up the PCLaw Link in Time Matters* on page 5.

The Remote Client is a modified version of the “Link” that allows a Time Matters user to send requests and synchronize with PCLaw without installing the full PCLaw application on every machine linked to Time Matters.

Note: If PCLaw is installed on a computer, the Remote Client is not required.

In situations where multiple workstations (users) require access to PCLaw, the Remote Client can be installed on the individual workstations to allow those users to perform basic PCLaw operations and functions without having to perform a complete PCLaw installation. For additional information on installing the Remote Client, refer to *PCLaw Remote Client Setup* on page 11 of this manual.

What You Need

To install the Remote Client completely, two computers must be set up. One computer must act as a server and a second computer must act as the client. The two very distinct procedures that must be completed to set up these two separate computers are:

- "To Install the PCLaw Remote Client Server" on page 12
- "To Install the PCLaw Remote Client" on page 14

Before you begin the installation and set up process, please ensure that your computer(s) meet and/or exceeds the minimum system requirements, and:

Installation Type	Minimum Requirements	Applicable Installation Procedure
PCLaw Link*	Time Matters 9.0 SR-3 installed	"Setting Up the PCLaw Link in Time Matters" on page 5
	PCLaw version 9.30 or later installed	
PCLaw Remote Client Server	Time Matters 9.0 SR-3 installed	"Setting Up the PCLaw Remote Client Server" on page 12
	PCLaw version 9.30 or later installed	
	Create a shared folder (i.e., **PCLaw Data\Data\Remote**) that the Remote Client will use to send requests to PCLaw	
PCLaw Remote Client^	Time Matters 9.0 SR-3 installed	"Setting Up the PCLaw Remote Client" on page 14
	PLSVCLNK.exe must be running on the server	
	Know the name and location of the shared folder located on the server that the Remote Client will use to send requests to PCLaw	

* - PCLaw Link is recommended for users who need to have direct access to PCLaw for the purpose of printing reports, using the PCLaw Navigator functions, etc.

^ - Installing the Remote Client on each workstation is recommended if you do not need direct access to PCLaw, but want to utilize PCLaw functionality except for Navigator functions via the PCLaw Link in Time Matters.

Setting Up the PCLaw Link in Time Matters

Time Matters and PCLaw communicate via the PCLaw Link. In situations where a user may have both Time Matters and PCLaw installed on their computer, the PCLaw Link can be utilized to communicate between the Time Matters and the PCLaw applications.

There are two procedures that must be performed to complete the PCLaw Link Setup process in Time Matters. You must set up the PCLaw Link at:

- Program Level Setup—affect all users of the application/program.
- User Level Setup—affect individual users, and Program Levels settings can be overridden.

The specifics of each PCLaw set up procedure are discussed in detail on the following pages of this document. Additional PCLaw information can be found in the Time Matters Online Help system.

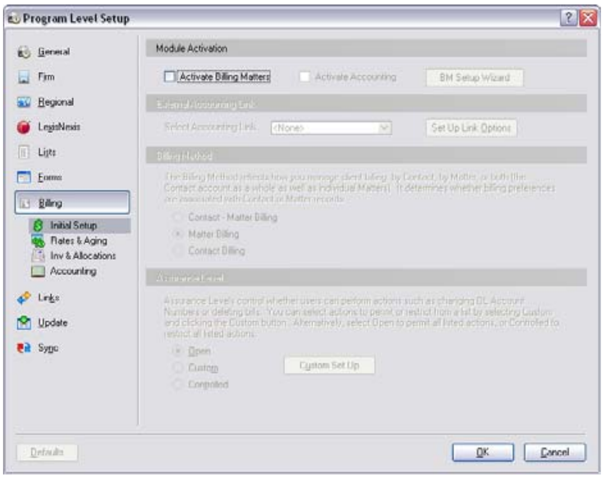
PCLaw Link Setup at the Program Level

PCLaw Link settings applied at the Program Level affect all users of the application/program. These settings are saved in a central database and are applied whenever the database is used.

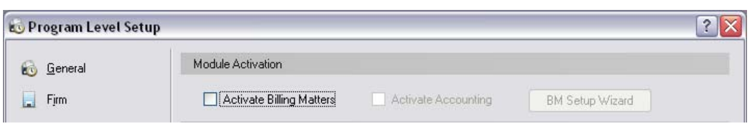
Note: The PCLaw Link must be set up on each computer that will use the Link. Some changes may require that the program be restarted for Program Level settings to take effect.

To Set Up the PCLaw Link at Program Level

1. Confirm that you have the correct version of both Time Matters and PCLaw installed on this computer. Time Matters will link with PCLaw version 7 or later.
2. On the Time Matters main menu bar, click **File > Setup > General > Program Level**.

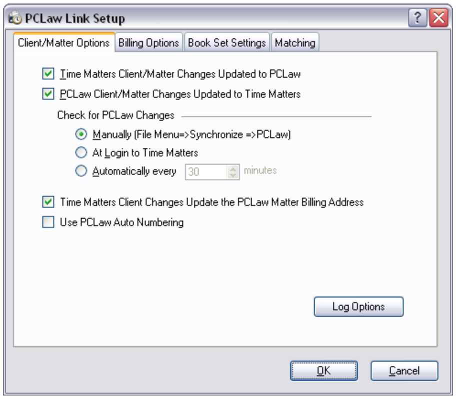


3. On the Billing tab, ensure that the **Activate Billing Matters** check box is cleared.

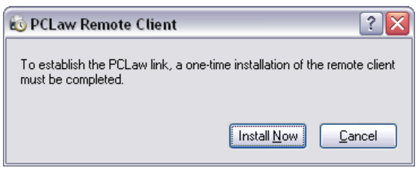


4. Click the Links tab and highlight the **Billing** subtab. Select the **Activate Billing** check box.

5. Select **PCLaw** from the drop-down list and click the **Set Billing Options** button.



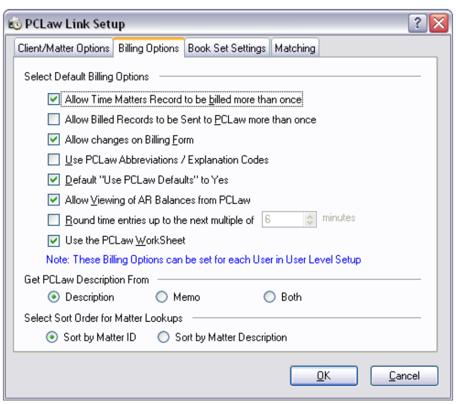
- If this is the first time you have entered PCLaw Setup on this computer, Time Matters will prompt you to install the PCLaw Remote Client. See *PCLaw Remote Client Setup* on page 11 for additional information.



- If you have previously installed the PCLaw Link, the Data Link opens to initialize the link.

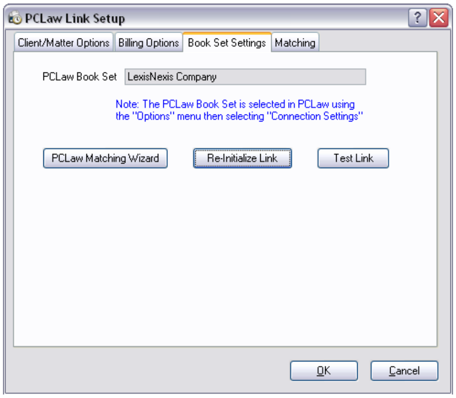
6. Enter the settings that match your preferences for how the Link should work regarding entries and changes in Client information.

7. Click the **Billing Options Tab**. Enter the settings for transferring billing entries to PCLaw.



8. Click the **Book Set Settings Tab** to specify the PCLaw Book Set that will be used as the default for the Link.

   After you have selected the Book Set, click the **Test Link** button to test the Link. If the PCLaw Link test is successful, click **OK** on the Testing PCLaw Link screen to continue.



9. Click the **Matching Tab** to match Time Matters Staff, Classification Codes, and Contact/Matter fields to their corresponding PCLaw entities.

   The PCLaw Lawyers are listed on the far left, and the Time Matters Staff are listed on the far right. The column in the middle indicates matches. Click the PCLaw Lawyer you want to match. Click the Time Matters Staff you want to match with this PCLaw Lawyer. When both are highlighted, click **Match**.

   a If you have Lawyers already entered into PCLaw, select the Lawyer to import and click the **Import Staff** button to bring them into Time Matters (they will be matched as they are brought in). A Time Matters Staff screen will open to get additional information, such as the Staff initials. After a Lawyer is imported, it appears gray in the PCLaw list. Click the **Edit Staff** button to add, change, or delete Staff from Time Matters.

   b Continue the matching through each of the other tabs (Matter, Codes, etc.).

   Matching can also be accomplished in Time Matters directly from the Staff Entry Forms and Event, ToDo, and Classification Code Forms. Matching directly from these entry forms is effective later when individual Staff or Classification Codes are being added.

   c Click **OK** on the Matching screen after completing matching. Click **OK** on the Program Level Setup Screen after completing your setup.

10. Go to *PCLaw Link Setup at the User Level* on page 9.

PCLaw Link Setup at the User Level

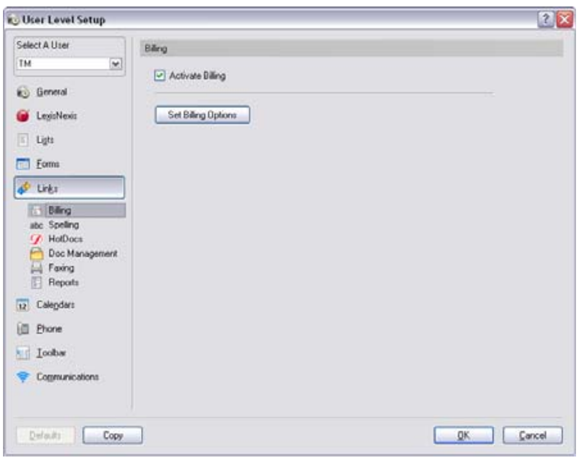
PCLaw Link settings applied at the User Level affect individual users. These settings are saved in the central database and activate whenever a user logs in to the program, regardless of the workstation used to log in.

Note: The PCLaw Link must be set up at the User Level for each user that will use the Link.

After setting up a user, you can click the **Copy** button to copy that user's settings to other users.

To Set Up the PCLaw Link at User Level Setup

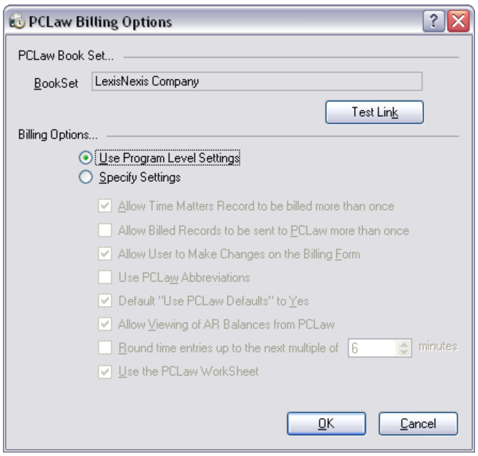
1. Confirm you have completed the Program Level Setup process before proceeding.
2. On the main menu bar click **File > Setup > General > User Level > Links > Billing**.



3. Click the **Links** tab and highlight the **Billing** subtab. Select the **Activate Billing** check box.
4. All Time Matters users are listed in a drop-down list at the upper left corner of the screen. When this screen opens, the user currently logged into Time Matters is highlighted. Select the user whose setting you want to enter.

5. Click **Set Billing Options**. Check the PCLaw Book Set. The Book Set listed is the default used in Program Level Setup. Time Matters should only connect to one PCLaw Book Set. This option is available to help handle the fact that different PCLaw users can see the same Book Set as different Book Set numbers.

   All users who will be billing to PCLaw should be connected to the same Book Set, without regard to the Book Set number that was automatically assigned by PCLaw for each user.

6. Click **Test Link** to confirm the link is working. Click **OK** as applicable to continue.
7. The Billing Options area is used to:
   - allow users to generate multiple billing forms from a single record (i.e., Event, ToDo, etc.)
   - allow users to send Time Matters billing records to PCLaw more than once
   - allow users to change the matching area on Billing Forms (if this is not selected, the PCLaw side of the matching area on the Billing Form will be grayed-out)
   - determine if PCLaw abbreviations can be used on the Billing Form
   - determine whether to use default PCLaw rates, or the ones set in Time Matters
   - allow users to view AR balances from PCLaw. Click **OK** after selections have been made
   - allow rounding time entries up to a multiple of "X" minutes (i.e., 3 mins, 45 sec. is rounded up to 6 minutes
   - allow users the option of using the PCLaw Worksheet or the Time Matters timesheet
8. Click **OK** on the User Level Setup screen after completing your entries.
9. After completing User Level Setup, exit and restart Time Matters before using the PCLaw Link.

PCLaw Remote Client Setup

The Remote Client can be installed on individual workstations to allow users to perform basic PCLaw operations and functions without having to perform a complete PCLaw installation.

> When running the PCLaw Remote Client, PCLaw Navigator functions are unavailable.

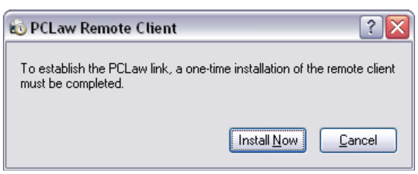
To completely install the Remote Client, two (2) computers must be set up. One computer must act as a server and a second computer must act as the client. The two very distinct procedures that must be completed to set up these two separate computers are:

- "To Install the PCLaw Remote Client Server" on page 12
- "To Install the PCLaw Remote Client" on page 14

Users will be prompted to perform a one-time installation of the Remote Client when they attempt to perform any of the following operations if the client has not previously been installed:

- create a new Contact or Matter at the time it's being sent to PCLaw
- access the PCLaw Worksheet or Billing Form
- preview a PCLaw report
- set PCLaw Billing options at Program Level or User Level Setup

An illustration of the prompt to perform the one-time installation of the Remote Client is as follows:



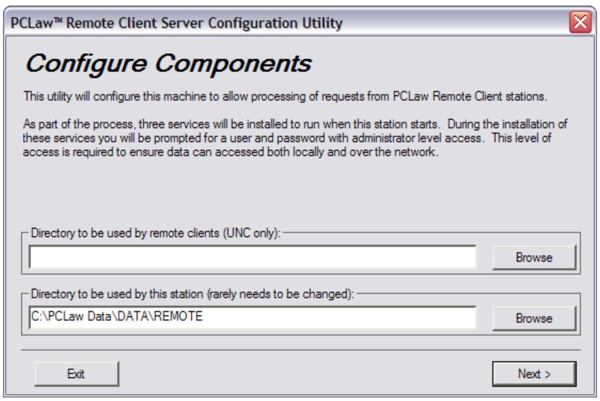
Note: Before performing any installation of the Remote Client, be sure the requirements identified in *What You Need* on page 4 have been met.

Setting Up the PCLaw Remote Client Server

To set up the server for the Remote Client, it's important that the computer that will perform the "Server" duties meet the requirements as specified in the section titled *What You Need* on page 4 of this manual, and have PCLaw 9.30 and Time Matters 9.0 installed.

To Install the PCLaw Remote Client Server

1. Close all applications and/or programs before proceeding with this procedure.
2. Review *What You Need* on page 4 to ensure that all requirements have been met.
3. In PCLaw, go to **Options > Connection Settings**. The Connections Settings screen opens.
4. Select the **Use This Set of Books when Connecting with Other Programs** check box.
5. Click **Configure Remote Server Settings**. The PCLaw Remote Client Server Configuration Utility screen opens.

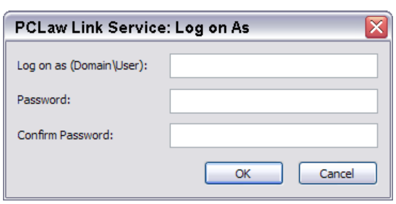


Note: Ensure that the PCLaw Data folder is "Shared" before proceeding to the next step,.

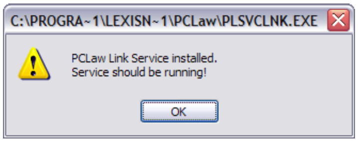
6. Enter the path/directory (i.e., **\\myfilepath\pclaw data\data\remote**) that will be used by the Remote Client.

   Note: The path/directory entered here must be formatted using the universal naming convention (UNC) syntax.

7. Click **Next**. The "PCLaw Link Service: Log on As" screen opens.

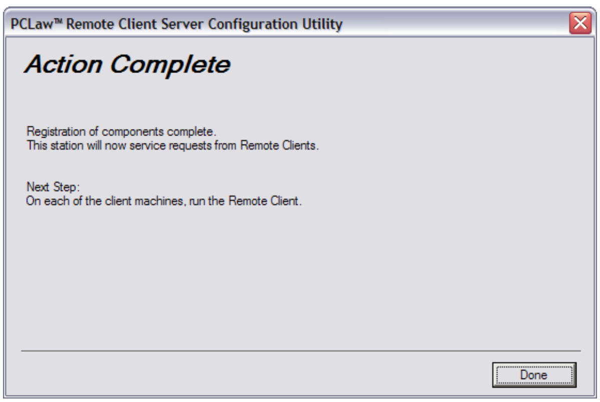


8. Enter your Domain\User name, Password, and confirmation Password. The PCLaw Link Service Installed screen opens.



9. Click **OK**. A second “PCLaw Link Service: Log on As” screen opens.
10. Enter your Domain\User name, Password, and confirmation Password. The PCLaw Log Service Installed screen opens.
11. Click **OK**. A third “PCLaw Link Service: Log on As” screen opens.
12. Enter your Domain\User name, Password, and confirmation Password. The PCLaw Time Matters Service is Running screen opens. Click **OK**.

    Note: If the Time Matters login screen opens, the Server Utility is creating a link to Time Matters to send the location of the redirect path for the Remote Client.
13. The Action Complete screen opens to confirm registration. Click **Done**.



14. Open Time Matters and complete *PCLaw Link Setup at the Program Level* on page 6 and *PCLaw Link Setup at the User Level* on page 9 to re-initialize the PCLaw Link.

The system must be restarted to restart the services and to load the link from the Client after you have re-initialized the PCLaw Link.

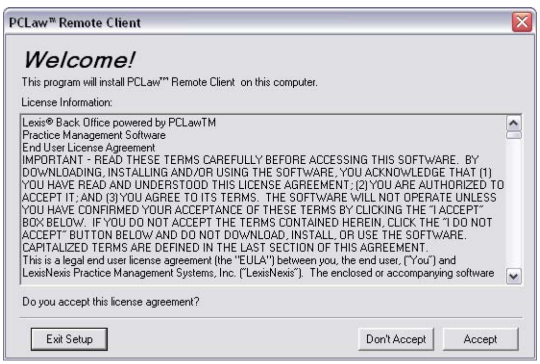
Setting Up the PCLaw Remote Client

To set up the Remote Client, please ensure that the computer that will perform the "Client" duties meet the requirements as specified in the sectioned titled *What You Need* on page 4 of this manual, and that the PCLaw application is not installed on this computer.

To Install the PCLaw Remote Client

1. Review *What You Need* on page 4 to ensure that all requirements have been met.
2. Ensure that PCLaw is not installed on this computer, and delete the PCLaw program directory and all PCLaw application files as required.
3. Complete the *PCLaw Link Setup at the Program Level* on page 6 and *PCLaw Link Setup at the User Level* on page 9 before proceeding to the next step.

   Note: This step can not be completed until the Remote Client is installed and the link is initialized.
4. From the PCLaw Remote Client screen, click **Install Now**. The PCLaw Remote Client Welcome screen opens.



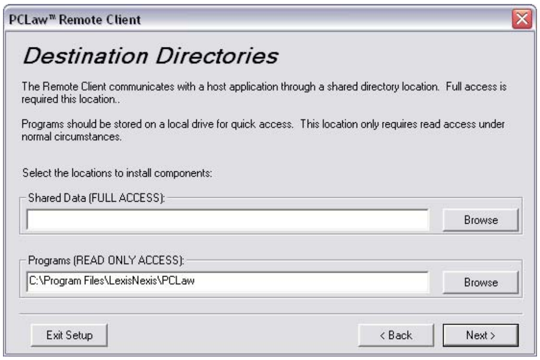
5. Review the End User License Agreement information and select **Accept** to accept the conditions. The Destination Directories screen opens.

6. Perform one of the following:

   - If accessing PCLaw via Program Level Setup, User Level Setup, or if you attempt to perform other PCLaw functions (i.e., Billing Form, PCLaw Report, create a Contact or Matter), then the Shared Data Folder information will already be completed, and thus no entries are required. Click **Next** to continue.

     -or-

   - If accessing PCLaw via Workstation Level Setup, then enter the Shared Data folder information (i.e., **\\myfilepath\pclaw data\data\remote**) that was entered when the PCLaw Remote Client Server was set up. Click **Next** to continue.



Note: Your Shared Data Directory may be different than the information displayed in the illustration above. This directory was identified when the PCLaw Remote Client Server was installed.

7. Click **Start** on the Ready to Install screen.
8. On the Successful Installation screen, click **Done**.

Using the PCLaw Link

This chapter is intended to provide a brief and basic understanding of using the PCLaw link. A general overview of the PCLaw Link and information for using the Billing Form, PCLaw Worksheet, and adding Contacts and Matters to PCLaw is included.

If you require information regarding the PCLaw Link and associated PCLaw functions, please refer to the Time Matters Online Help System. The Online Help System provides information for:

- using the PCLaw Matching wizard
- using the PCLaw Client and Matter Field Matching Template
- adding Contacts and Matters to PCLaw
- importing records from PCLaw
- sending Billing records to PCLaw

PCLaw Link Overview

The PCLaw link is used to end the duplication of entries inherent in using Billing and Calendar/ Matter Management. If you enter information on your Calendar for a meeting, you often have to go to your Billing program to enter the same information. However, once the matches have been made between Codes (Classification Codes), Lawyers (Staff), and Clients (Contacts), the information entered in Time Matters can automatically complete the entries in PCLaw. For information regarding matching Staff, Codes, and other information in Time Matters and PCLaw, refer to *"Setting Up the PCLaw Link"* and the *"PCLaw Matching Wizard"* topics in the Time Matters online Help.

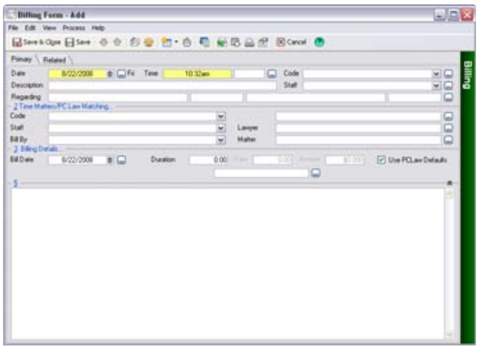
Time Matters and PCLaw communicate via the PCLaw Link. In situations where users may have both Time Matters and PCLaw installed on their computer, the PCLaw Link can be utilized to communicate between the Time Matters and the PCLaw applications.

Once the PCLaw link is successfully set up, users have the option of using the Billing form or the PCLaw Worksheet to capture billing information or the time that's spent on a particular Matter.

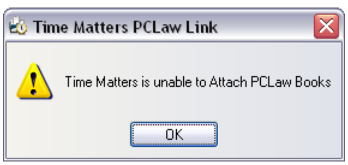
Billing Form

The Billing Form is used to add information and to keep a record of Billing information that has been sent to PCLaw from Time Matters, or to accommodate adjustments between the Calendar and the Billing information.

Click the **Billing** button or use the Hot Key CTRL+SHIFT+B from a form, to open the Billing Form.



Note: If a PCLaw Book Set was not selected when performing the PCLaw Link Setup at the Program Level, an advisory screen opens to indicate that Time Matters is not able to attach to the PCLaw Books. Click **OK** to open the Billing Form.



When the form opens, as much of the Classification Code, Staff, and Contact information available from the underlying Form will be used to complete as many fields in the Billing Form as possible. If the matches between Codes, Contacts, and Staff have already been made with PCLaw Task Codes, Clients, and Lawyers, a great majority of the Billing Form fields will already be completed.

The Billing Form can be set to hide or display the linking fields between Time Matters and PCLaw. To toggle these fields on and off, use the “Matching Area” and “Rate Area” options under the View Menu on the Billing Form.

While more information regarding Billing is automatically available from the time-dependent forms, the same Billing Form is available from the Contact and Matter forms. Therefore, billing can be conducted as you work from either the Contact or Matter forms, as well as the Calendars, Notes, Phone Calls, etc.

PCLaw Worksheet

The PCLaw Worksheet is used to record billing information and/or time spent on Matters. The records displayed on the worksheet are the unbilled time for the assigned/default staff. It is also used to:

- display a limited number of Billing records based on filters of Week/Staff applied by the user
- offer an easy way to see Work-in-Progress
- display the individual Billing records created for a Contact or Matter.

To access and use the PCLaw Worksheet, you must have selected the **Use the PClaw Worksheet** option when you completed the PCLaw Link Setup at the Program Level. Alternatively, you can select this option from the User Level Setup screen by going to **File > Setup > General > User Level > Links > Set Billing Options**. Click **Specify Settings**, and select **Use the PClaw Worksheet**. Click **OK** to close all associated screens.

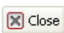
Once you have selected the “Use the PCLaw Worksheet” option, you can access the Worksheet using any of the following methods:

- on the main menu bar, click **Billing > Worksheet**
- ALT+F6

When you click **Submit** on the PCLaw Worksheet, the records will no longer be available on the worksheet, but will still exist on the Billing List.

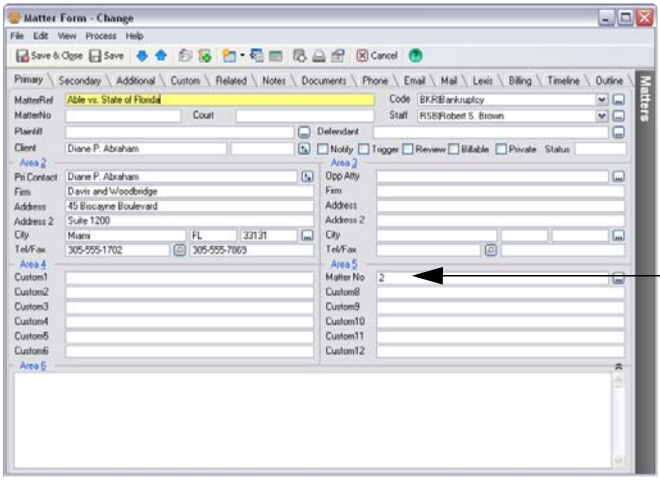
All Time Matters and PCLaw matching (i.e., Staff, Classification Codes, Lawyers) must be completed before attempting to using the PCLaw Worksheet.

PCLaw Worksheet Screen Elements

Option	Description
	Gives the user the ability to add/create new records, edit records, and/or delete records as applicable.
	Activate the Spell checker
	Print the record(s)
	Sends all records in the Worksheet list to Billing
	Closes the Worksheet list
Date Range	Records within the selected date range are displayed on the list. Select a predefined date range from the drop-down list, or specify a date range using the **From** and **To** fields.
Date	Date of the record.
Matter Ref	The name by which this Matter will be referred to throughout the application. By default, this is a required field.
Staff	The responsible staff person to which the record is assigned.
Lawyer	The PCLaw lawyer associated with a specific time entry.
Bill Code	Used to categorize the Billing records.
Hours	The client associated with the Matter.
Use Defaults	The default PCLaw billing rate for this Matter.
Rate	The rate to be charged for the Time entry.
Amount	The charge for this time entry.
Expl. Code	Explanation Code.
Description	A description of the work to which the record applies.
Non-Billable/Billable	Time based on the Task Code for the records being displayed.
Total Hours	Total Duration for all records on the Worksheet List.
Amount	The total charge for all the records on the worksheet.
Other Fields	Accounts Receivable (AR) information for this matter, and is only visible if the Allow viewing of AR Balances from PCLaw is checked at the Program Level and User Level Link Setup.

Adding Matters to PCLaw

New Matter records created in Time Matters can be automatically numbered and added to PCLaw. Enter **(1)** the appropriate Client/Contact information in the Client Field (Area 1), **(2)** the Primary Contact in the Contact Field (Area 2) of the form, and **(3)** the automatic numbering identifier **<New>** in the Matter Number Field (Area 5). Upon detecting an entry (**<New>**) in the Matter Number field, Time Matters creates a matching PCLaw Matter and Client (if the client does not already exist in PCLaw).



Note: The numbering format for the Matter No. field varies based on the Automatic Matter Numbering scheme selected (By Firm, By Client) in the PCLaw System Settings.

Note: Contact records are added to PCLaw much the same way that Matters are added.

For additional information regarding adding Contacts and/or Matters to PCLaw, refer to the following Time Matters Online Help topics:

- Requirements for Adding Matters to PCLaw
- Setting Up the PCLaw Link
- PCLaw Automatic Numbering