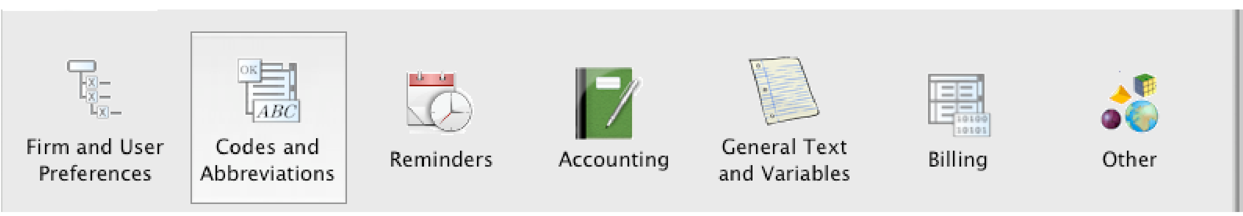
SETUP TAB

1 Overview

The Setup tab is where you tell LawStream how you prefer to work. Here you set user preferences, add new users, create lists of time/disbursement codes, set reminder checklists, add G/L codes, define global variables for the firm, establish billing options, and more. The startup data file is delivered with user initials and preferences for at least one timekeeper. You can change any of the initial preferences in the Setup tab.



You will see on the above image, that there are seven pushbuttons: click any of them to make LawStream display a further selection of options related to that area. For example, if you click "Firm and User Preferences", you will see new buttons for "Name, Address, Phone", "Localizing", "Other Global Settings", and "User Names/Codes/Prefs".

Preferences in LawStream

Preference fields are merely data in your firm's LawStream data file. Some of those preferences apply globally to everyone in the firm, some apply to individual users, and some can be set for individual LawStream session.

Some examples of preferences for the firm:

- header format for client bills, letters, and similar reports (in the name, address, phone section);

- default time amount for time entries, default interval for schedules, preferred date format (in the Other Global Settings section);
- billing preferences (several different preferences are accessed via the Billing Preferences pushbutton in the Billing area of the Setup tab): those preferences affect the appearance of client bills, and the procedures for communicating between the billing and accounting modules of LawStream.

Some examples of preferences for Individual users:

- user initials: once you have set these initials, you should not change them
- password: if you enter a password in this field, then you will have to enter that password each time you start a LawStream session
- default G/L accounts:
- reports show all users

LawStream will only set user preferences on start up. If you change your preferences you will need to log out and log back in to have the change take effect. If you just want to change the preference for this session, use the Session Preferences command in the LawStream menu.

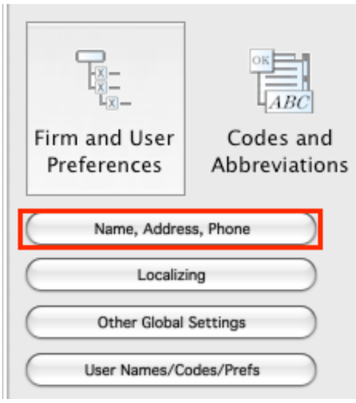
More Information Related to Preferences

This chapter contains descriptions of each window in the Setup Tab. Further guidance on preferences is available in parts of the Accounting Systems chapter of this manual.

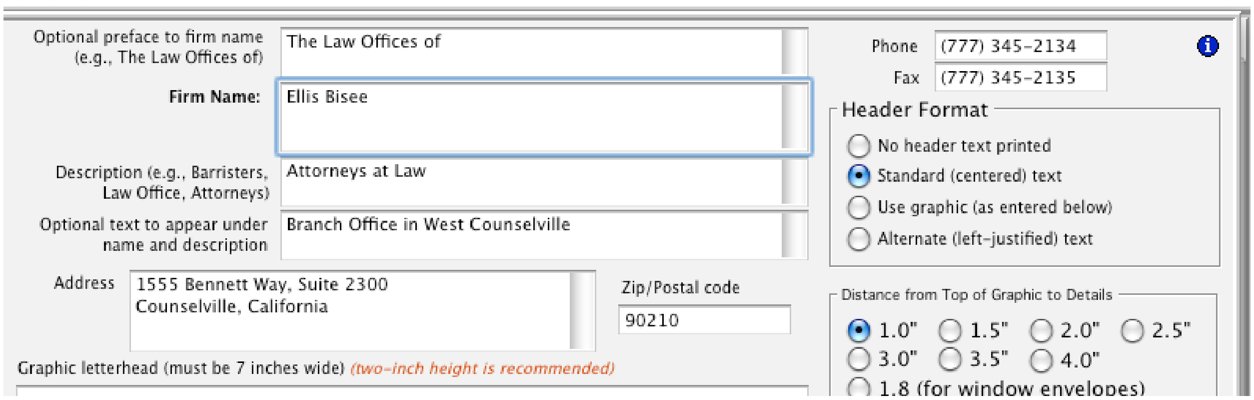
2 Entering Firm and User Preferences

To access any area on this tab, press the relevant pushbutton to display it. This window is where you will set options, defaults, preferences and codes that will apply to the entire firm. It includes preferences for individuals (users), as those preferences can apply to anyone in the firm (e.g., common initials of all users, so each user will have a consistent way to send messages and set schedules for others in the office).

2.1 Name, Address, Phone



This window is used for creating the main letterhead information for your firm. The window opens in data entry mode so you can enter data without having to press an "edit" button.



Optional preface to firm name: Enter text that you would like to appear before your firm name on correspondence, such as "The Law Offices of".

Firm Name: Your firm name is entered here when your initial datafile is prepared for you; it may not be changed without contacting PowerSof.

Changing Your Firm Name

If your firm incorporates or adds new partners, or if a partner leaves the firm, it might be necessary to change the firm name. Users who have kept their firm's annual support contract current may contact PowerSoft (LawStream support) for an update key to change the name. Before you contact LawStream support for the update key, be sure you have the exact name you want to appear on reports, and the date when you will be making the change.

Description: This field is optional; text entered here will appear on some reports, as a description following your firm name (e.g., "Attorneys at Law" or "Barrister and Solicitor").

Optional text to appear under name and description: This field is optional; text entered here will appear under the firm name on billings, letters, and some other reports. An example of text you might want to include in this field is “Attorneys at Law”.

Address: This is the firm’s full address with embedded carriage returns (new lines) where necessary, but excluding the postal/zip code.

ZIP/Postal Code: This is where you will put your firm's zip/postal code. American addresses may be entered in the “12345” format, or “12345-6789” format. Canadian addresses will have lower-case letters in their postal codes automatically converted to UPPER-CASE if necessary, and will automatically have a blank inserted between the first three and last three characters of the postal code, if necessary.

Graphic Letterhead: This is a graphic field, that may (if you select graphic as the option for headers on reports) appear on bills, statements and similar “public” reports produced by LawStream. The graphic field itself is to be pasted into this field, and should be in pict (Mac) or metafile (Windows) format, for best results. Different graphics applications produce different types of graphics, and different printers (e.g., laser printers compared to ink-jet printers) produce different qualities of images, so you should experiment with different graphic images, to get the best format for your printers. LawStream will assume that this graphic field is to take up an area 7 inches by wide, on reports. Be sure to save your graphic at an appropriate resolution level for your printer, to avoid jagged edges: if you merely copy a graphic straight from a screen image, you will likely find that it has a resolution of only about 72 dots per inch, rather than the finer (smoother) 300 dots per inch or 600 dots per inch expected by your printer.

Alternate Graphic Letterhead: For now, this field is only a “place-holder”, but will be made available for firms needing two different graphics for their bills and letters. Firms with a branch office or a specialized area of expertise might want to have two different images to express to their clients.

Graphic Letterhead Footer: This is another graphic field, that can be used (optionally) in conjunction with the graphic letterhead field. LawStream will assume that this graphic field takes up an area 7 inches wide by one-half inch high, on reports.

Using A Graphic Footer

You can use a graphic header without a graphic footer. If you are using a graphic footer, though, you must have a graphic header. If LawStream does not see a graphic header in your data base, then it won't print the footer.

Standard Fax Trailer: This field will appear as a standard footer on faxes produced by LawStream. It should be no more than a few lines long, and will appear at the bottom of any fax printed through LawStream's "Prepare Letter" feature. See the Memos/Letters chapter for further details. In most cases, it will contain standard warnings about privilege and confidentiality.

Phone: This is the firm's main phone number. It must be entered as numbers only. LawStream will convert it to a formatted field in reports (e.g., 551112222 will be appear as (555) 111-2222 on reports). LawStream expects 10 digits unless your firm's localizing preferences have been set to something else.

Fax: This is the firm's main fax number. It must be entered as numbers only. Like phone numbers in LawStream, it will be converted to a formatted field in most reports and displays.

Header Format: This field specifies the way the firm's letterhead will appear on "public" reports produced by LawStream (letters, bills and statements). Although this preference can be changed temporarily during any LawStream session (through the user preferences sub-menu), you will generally want a consistent way of presenting your firm's image in those types of reports.

- The first option (no header text printed) should be used if you are printing reports onto paper with pre-printed letterhead; if you choose this option, you should be sure your pre-printed letterhead does not extend below the first few inches of the page, to avoid seeing some information overlap with the detail information printed by LawStream;
- The second option (standard, centered text) is the way most users want their reports to appear;
- The third option (use graphic, as entered below) will leave most of the reports with a standard (centered) format, but will put the firm's graphic letterhead on letters, bills, statements, etc.. The use of this option requires that you enter a graphic of your firm's letterhead into the graphic field on this window; see elsewhere in this section of the manual, for more information on entering that graphic;
- The fourth option for letterhead is a variation of the second option. The same sort of information appears, but it is left-justified rather than

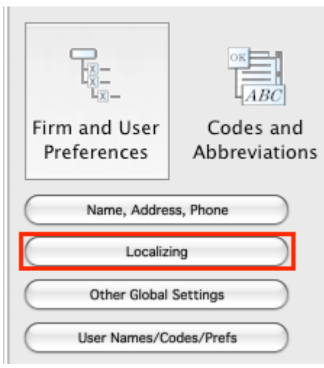
centered. You might want to try both types, and select the one your firm will normally prefer.

Distance from top of graphic to details: By selecting one of the distances shown on the radio-buttons in this section, you will make LawStream start its detail information a bit lower (or a bit higher) on the page.

Envelope Format: There are two choices of text layout for envelopes here. In addition, if you click on the box beside "Address starts…", you can further customize the placement of the address.

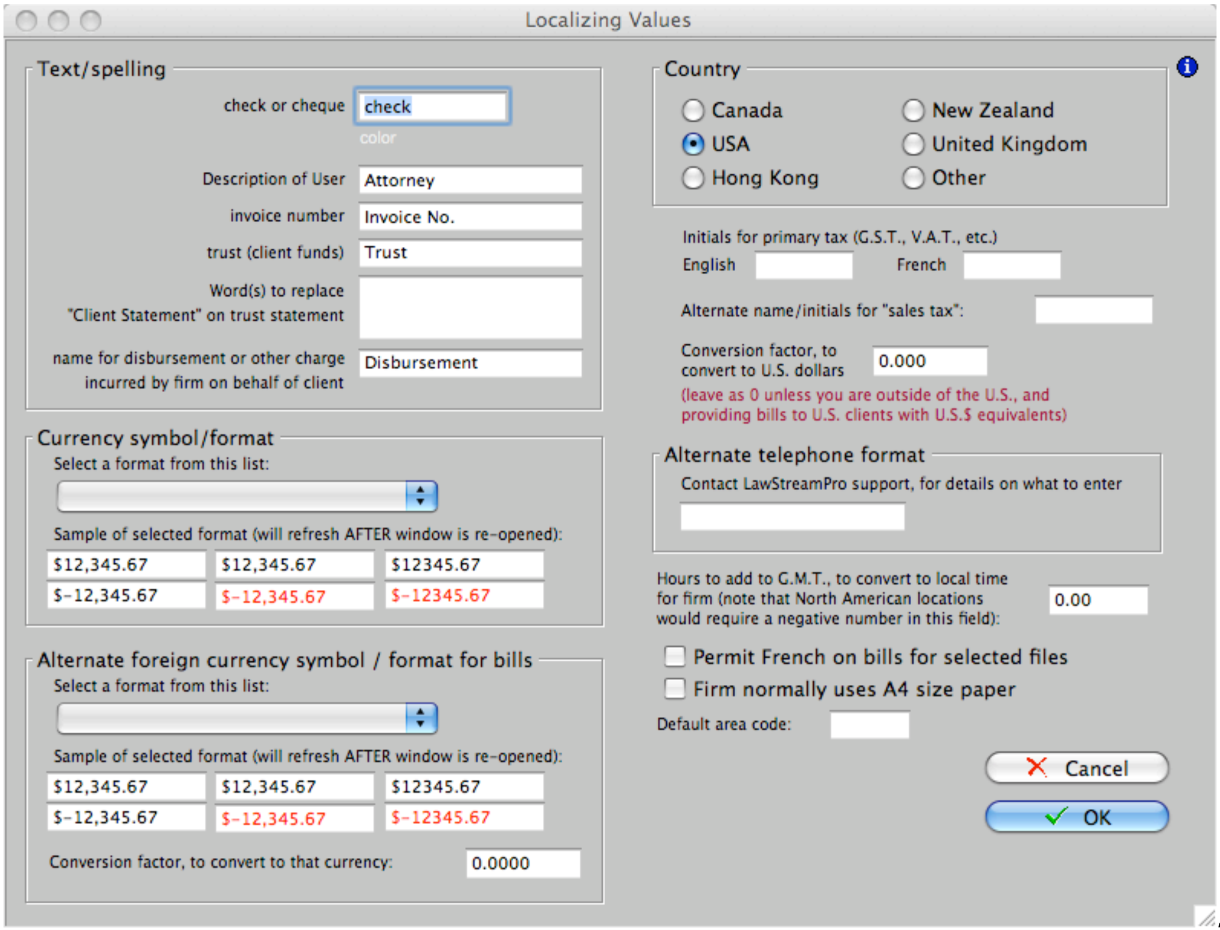
Hide return address on envelopes: This field will suppress the printing of the return address on envelopes.

2.2 Localizing



This window is used for establishing terminology and some other preferences that are specific to one area. In most cases, the localizing preferences for your office have already been set up by PowerSoft support staff before you start using LawStream.

An image of that window appears below.



Check or cheque: American users will want this to say check; users in Canada, Hong Kong and British-based jurisdictions will likely prefer cheque.

Description of user: Some entry windows and reports refer to the person using LawStream. For example, some work-in-progress reports refer to the amount of time billed by each user on a file. This field should contain a word describing users in your office. The word "user" is fine, but attorney, biller, timekeeper or lawyer would also be acceptable.

Invoice number: Most likely, you will want this to contain the words "invoice number" (without the "quotes"). Whatever word or words go into this field, will be used to describe the unique number/identifier of each individual client account (bill) sent by your office.

Trust (client funds): This describes money you hold on your clients' behalf. Most firms will use the word "trust", although some firms might instead choose a phrase like "stakeholder funds", "client funds" or "escrow funds".

Client statement: This field controls the heading on an optional trust statement that may be printed along with a current bill to your client. In the example shown below, the firm chose to use the words "Current Trust Statement". Leaving this field blank means the words "Client Statement" will print as the heading.

Statements and Bills and Accounts, oh my!

Further information on terminology is found elsewhere in this manual, but it may be helpful to note this here: "statements" are not the same as bills, as far as LawStream is concerned: LawStream uses terminology that is similar to what most bookkeepers and accountants use. A "bill" (a.k.a. an "invoice") is a document sent to a client, to notify the client of work and other charges that have been incurred, which have not yet been shown on any other bill; a bill asks a client to pay, and should provide a client with enough information to know why the money should be paid. A "statement", on the other hand, is a summary sent to a client, providing the client with the status of billings and payments for a file: it does NOT include any new invoicing or billing information. It, too, asks a client to pay, but it is a reminder or summary, and not a first notification.

Name for disbursement or other charge incurred by firm on behalf of client: Normally firms will use the term "disbursement" to describe expenses incurred on behalf of clients; you may change this if you prefer another term (e.g., "costs" or "expenses"). The term you use will appear on billings/invoices sent to your clients.

Currency Symbol/Format: This option will define the currency symbol used throughout LawStream. The default currency symbol is "$", but other options are available. Note that some reports will continue to show a dollar sign, even if a different symbol has been specified in this field; you should expect, though, that bills and other "public" documents (those you might expect your clients to receive) will display the correct currency symbol.

Alternate foreign currency symbol/format for bills: This field defines the currency to be used on client bills, in place of the standard currency used elsewhere in the program.

Country radio-button group: Click on one of the radio-buttons in this group, to set most of the localizing values for an office, based on where the office is situated. This is a broad change and you may want to fine-tune some options after changing the country. In most cases, you can expect to have these settings defined for you, as part of your initial LawStream package.

Initials for primary tax fields: Law offices in Canada, the United Kingdom and other countries where a global tax applies to their goods and services, may enter the common abbreviation for that tax in this field. The abbreviation will likely be GST, HST, or VAT, but other initials could be used. If no such tax applies to your office, then this field ***must*** be left blank.

Conversion factor field: Some firms are required or expected by their clients to state the amount of their bills in local currency and in an equivalent amount of U.S. funds. If your firm is one of those, then that conversion factor (entered as a decimal number) must be entered here. United States firms (and others that don't need to refer to a conversion factor) ***must*** keep this number as zero, and ***NOT*** use the number 1 as a conversion factor.

Alternate Telephone Format: This field defines the phone number format if it is different from the (123) 456-7891 format used in North America.

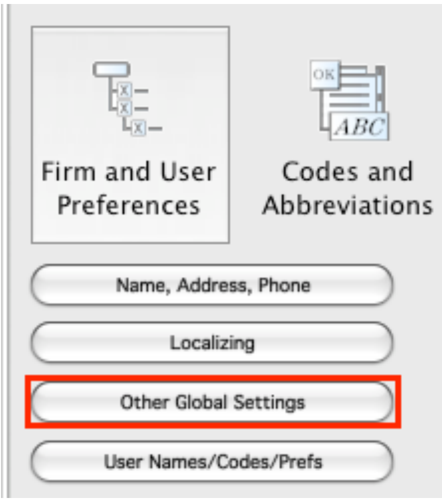
Hours to add to G.M.T.: currently used only for reference purposes; it can be available for export/email purposes, for applications that rely on this data to identify your location.

Permit French check box: If this option is selected, some entry windows and reports will display additional options to permit users to produce bills and some other reports in French rather than English.

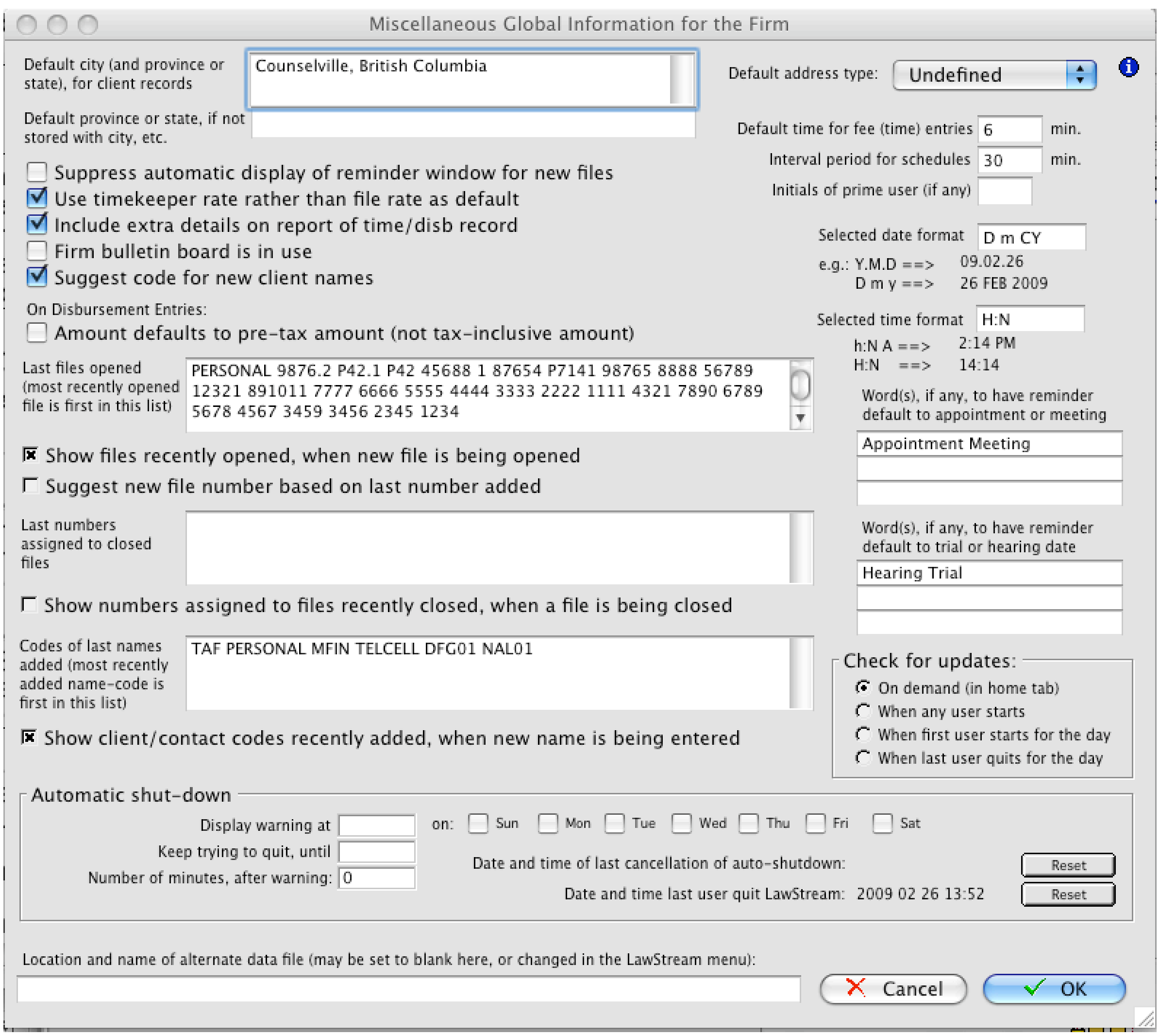
Use A4 paper check box: Selection of this option will cause client bills and some other reports to be adjusted to conform to narrower (A4) paper.

Default area code: If the majority of your clients have phone numbers with the same area code, you can put that area code in this field and have that code automatically appear in the phone/fax fields in a new contact window.

2.3 Other Global Settings



This window is used to set up a variety of preferences for your firm, including date and time formats. It also includes the numbers used for files recently opened and other lists that appear in different areas of LawStream.



Default city (and province or state) for client records: If the majority of your clients are in the same city and state (or province), entering those here will save you time by populating the appropriate fields in the new client (contact) entry window.

Default province or state: This is an alternate to the field above if the city of most of your contacts varies but the province/state stays reasonably constant.

Suppress automatic display of reminder window for new files: If you have a lot of new files to enter at the same time, or you just don't want the reminder window to pop-up after you enter a new file, check this box.

Use timekeeper rate rather than file rate as default: When billing, you can choose to bill at a timekeeper's rate or at a set rate for a file. If you want new files to default to the timekeeper's rate, check this box.

Different fee calculations

The "timekeeper rate" and "file rate" are only two of several ways of calculating fees to appear on bills, so you should not feel limited by those options. No matter what method you choose for calculating bills, you will still have the option to specify whatever fee amount you choose, when it is time to prepare a bill.

Include extra details on reports of time/disb record: This will make LawStream show extra details on a report of details for a single time record.

Firm Bulletin Board in Use: Select this option if you want LawStream to look after automatic refreshing of the text in any conversation or notice posted to the firm's common bulletin board area, so users will not have to refresh the text manually. Individual users can access the bulletin board ("chat board") via the "Firm's ChatBoard" command in the Memo/Letter menu.

Suggest code for new client names: If you want LawStream automatically to suggest a client code (contact code) for you when you enter a new contact, check this box. LawStream will use the first three letters of the contact name, followed by two numbers. For example a client with the last name Brown would be assigned a client code of BRO01, if he or she were the first Brown in your office; if there were already six other contacts in your data base (with codes BRO02 through BRO06), then the suggested code for a new contact would be BRO07.

More than 99 SMI or JOH or CHA contacts?

Some firms might have large databases, with more than 99 contacts whose names start with the same three letters. If that is the case with your office, you don't have to worry: LawStream will accommodate new contacts, by suggesting codes that take the large numbers into account. For example, after LawStream reaches ABC99, the next suggested code will be ABC0100.

Amount defaults to pre-tax amount (not tax inclusive amount): If this option is not checked and your jurisdiction requires taxing of disbursements (GST or VAT), then any amount you enter will be assumed to include tax. The tax will still be calculated and recorded: the only difference will be whether you enter the total amount (including tax), or the pre-tax amount.

Last files opened: This box will display the last file numbers your firm has used; this field is for reference purposes only, although you could change it if there is some special reason for doing so. Information in this field is displayed if you select the "Show files recently opened…" option.

Show files recently opened, when new file is being opened: When this box is checked, LawStream will generate a pop-up window showing the last file numbers used for new files. This option may be used whether or not you use a single set of sequential file numbers (see below) or a different sequence of file numbers based on the area of law, attorney/lawyer or other criteria. The pop-up window will allow you to see which file numbers have been used most recently, so you can choose the next one in line if you want.

Suggest new file number based on last number entered: When this box is checked, LawStream will automatically suggest the next sequential number for each file. This option is limited to numeric file numbers with 10 digits or less. If you wish to use dashes, letters or other symbols in your file "numbers", you should select the pop-up window option described above for choosing file numbers/codes. More information on choosing file numbers is available later in this chapter.

Last numbers assigned to closed files: This contains the last numbers assigned to the most recently closed files, for reference. Information in this field is displayed if you select the "Show numbers assigned to files recently closed…" option.

Show numbers assigned to files recently closed, when a file is being closed: To facilitate storage arrangements, some firms assign sequential numbers to closed files and cross-reference those numbers to the original file numbers. When this box is checked, LawStream will generate a pop-up window showing the last file numbers used when you are closing a file. See the Clients' Files chapter of this manual for further information on closing files.

Codes of last names added: This is a list of the most recently added client codes; it is shown here, for reference only, and is used by LawStream if you choose to refer to it when adding new contacts.

Show client/contact codes recently added, when new name is being entered: This relates to the "suggest codes for client names" preference. If you have selected that option, then LawStream will open a pop-up window when you are entering a new contact showing you the most recently used client codes.

Default address type: This field will set the default "address type" (e.g., home or office) for new contact records; the address type is for information purposes only, and could be used as extra data for exporting contacts.

Default time for fee (time) entries: Here you can set the firm's minimum default time for time entries. Many firms will select 12 minutes (.2 hours) for this field.

Interval period for schedules: Most firms choose 30 minutes or 60 minutes as the time intervals for setting up appointments through the Reminder window. The time slots available on the daily schedule will adjust accordingly. No matter what interval is set here, users can still enter any time they want for scheduled reminders and events.

Initials of prime user: This field is for information purposes only.

Selected date format: Here you can set your preference for how you would like to see the date formatted. Many date format choices are available, and they follow a pattern similar to what you may see in this list:

- Y.M.D. = 08.07.22
- D m y = 22 Jul 2008
- N D, y = July 22, 2008

“Just what date is 08/07/06?”

some suggestions on entering dates

LawStream will do its best to interpret a character string (whether it’s something like “08/07/06” or something like “July 8, 2006”) and store it as a date in your data base.

- **LawStream will default to the “here and now”**: if you enter a single number in a date field, then that number will be interpreted as a day of the current month of the current year; for example, if you enter the number 15 on August 4, 2008, then that date-field will be stored as August 15, 2008; similarly, if you enter a date and month in a date field, then the date for that field will be interpreted as that date and that month in the current year (e.g., entering 30 SEP on August 4, 2008 will cause the date to be stored as September 30, 2008);
- **LawStream prefers clarity (and alphabetic characters)**: if a date (such as the one in the header of this box) could be interpreted differently, LawStream will do its best to make sense of the date, but it won’t necessarily be correct; therefore, you should use alphabetic dates if you are entering a date that can’t default to one in the current month; 11 JAN 2008 can’t be mistaken for any date other than January 11, 2008, but 11/01/2008 could be mistaken for November 1, 2008;
- **It’s a good idea to check your dates**: When you tab out of a date field (or when you click on another field), you can expect LawStream to display the date field as LawStream has interpreted that field; it takes only a split-second of your time to read that date, and it could save you a lot of time searching for a wrong date if it was incorrectly interpreted.

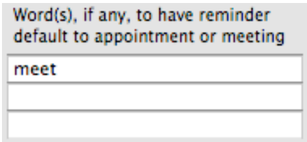
We recommend the format shown above as D m y (24 Aug 2008): it provides the flexibility of being able to enter a day-of-month that would default to that date in the current month, and it provides a clear and short expression of the date for your “data entry feedback”.

Note that other formats can still be selected for client bills, and note that some reports use special formats no matter what format you select for data entry.

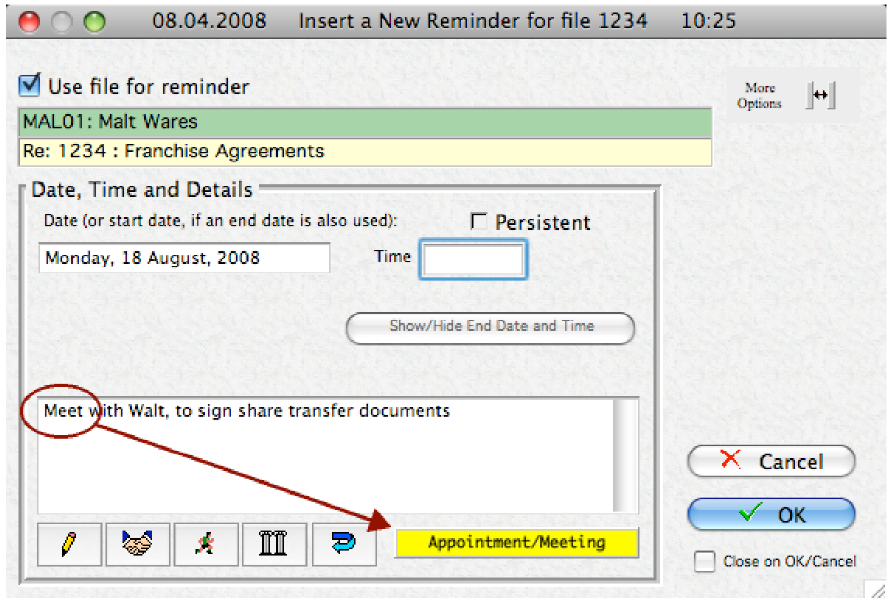
Selected time formation: Here you can set the time to be a 12hr or 24hr clock. The 12hr preference requires that the times be entered in the exact format expected. The 24hr format allows LawStream to recognize the correct time more reliably.

Word(s), if any, to have reminder default to appointment or meeting: This field is used to simplify the entry of appointments in LawStream. Although you can easily set a flag/switch to show that a reminder should be stored as an appointment, this makes the process a bit easier. If you key some text into this field that you want to use as a key for reminders that are to represent appointments or meetings, then LawStream will make note of your intention when you are entering reminders. For example, if you include the word “meeting” (without the “quotes”) in this field, and if you later enter some detail text for a reminder with that word, then LawStream will turn-on the switch that represents appointments or meetings.

Here's a graphic example:



By entering the word "meet" in this field and then later entering text such as the following in a new reminder the reminder will be classified as an Appointment or Meeting, as soon as you tab out of the detail text field.



Word(s), if any, to have reminder default to trial or hearing date: This field works similarly to the previous one: if the detail text of a reminder contains any word entered in this field, LawStream will interpret the reminder as a trial/hearing, and store the reminder as a trial or hearing.

Check for updates: If your computer is connected to the internet, this preference will tell LawStream to check the LawStream web site to let you know if the version in use is up-to-date with the version number shown on the web site. Select any of the options shown for this feature:

- on demand (in home tab)
- when any user starts
- when first user starts for the day
- when last user quits for the day

Note: the version number used for this purpose is changed only occasionally (when there are significant changes to the program). You should therefore be sure to check the LawStream web site regularly, for interim releases of the program that might be useful to you.

LawStream Program Updates *Must* Be Coordinated

It's a great idea to keep up-to-date by using the latest LawStream, but…

If any person in an office plans to update his or her copy of LawStream with the latest version available, then EVERYONE using LawStream in the office must be sure to update their own copies before anyone uses LawStream.

If different people in an office access the same LawStream data file with different versions of LawStream, there could be a risk of significant data corruption.

Automatic shut-down: If you want to have LawStream shut-down automatically, you can set the preference for the days of the week you would like it to shut down and activate a warning timer as well. This can be helpful if maintenance utilities are run on certain days. The automatic shut-down will make sure that all users are logged out before any utilities are run.

At the end of your day

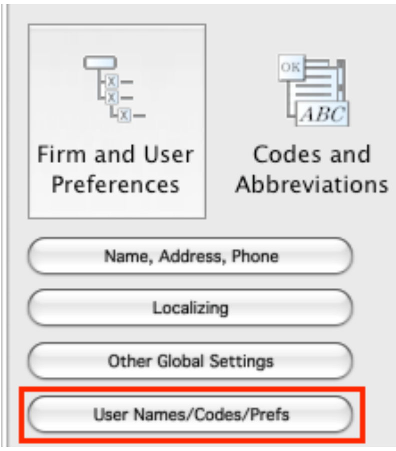
Whether or not you select the "automatic shut-down" option, it is a good idea to log out of LawStream at the end of each day. It reduces the risk of conflicts with backups or similar utilities, and it ensures that the correct date defaults are set the next time you start your LawStream program.

Location and name of alternate data file: If you would like to navigate to another data file (for example a test data file or management company) you can set the location and name of the alternate data file here in this field and then switch back and forth between datafiles, using the drop-down menu under the LawStream main menu. This field might look similar to the following, after you have established the location of a data file:

Office Mac HD:*LawStreamFolder:* MgmtCo Data

If you regularly switch back and forth between data files, then you probably will want to have each of your data files refer to the other as an alternate.

2.4 User Names/Codes/Prefs.



This window may be used to add or edit preferences that are user-specific. The window may also be used to add new users to your database. When you first click on the User names/Codes/Prefs. pushbutton, you will see your own name and sign-in initials (assuming you have signed into LawStream using your own initials). To enter a new user, click on Insert before proceeding. To modify your own (or another's) user preferences, locate the user initials and click on Edit.

Name: The name field must not be blank. The name in this field will appear on bills, letters and other reports.

Initials: Each user is assigned a unique set of sign-in initials (one, two or three characters). Those initials are the initials that each user keys into the sign-in window. The initials are also used to identify each user throughout LawStream (e.g. time entries, reminders). Each person using LawStream in your office should have only one set of initials, and only one "user record".

Changing a User's Name/Initials

A user's log-in initials MUST NOT be changed. If you delete a user-code, and if LawStream contains ANY data that might relate to that user (e.g. time records, disbursement records, accounting transactions), those records would become "orphaned" and will be difficult, if not impossible, to locate. If you need to change a user's name (for example if she has married), you may change the name, but you should not change her user initials.

DO NOT Delete a User's Name/Initials

DO NOT delete a user record, even if that person has left your firm. Otherwise any records associated with that user (e.g. time, disbursements, accounting) become "orphaned" and will be difficult, if not impossible, to locate. A series of warning messages will appear if you do try to delete a user record.

Password: For firms that require security to prevent others in the office from signing-in as someone else, a password may be specified here. By using password protection, you can prevent others from making LawStream think they are you, and you can limit their access to some types of information specifically related to you.

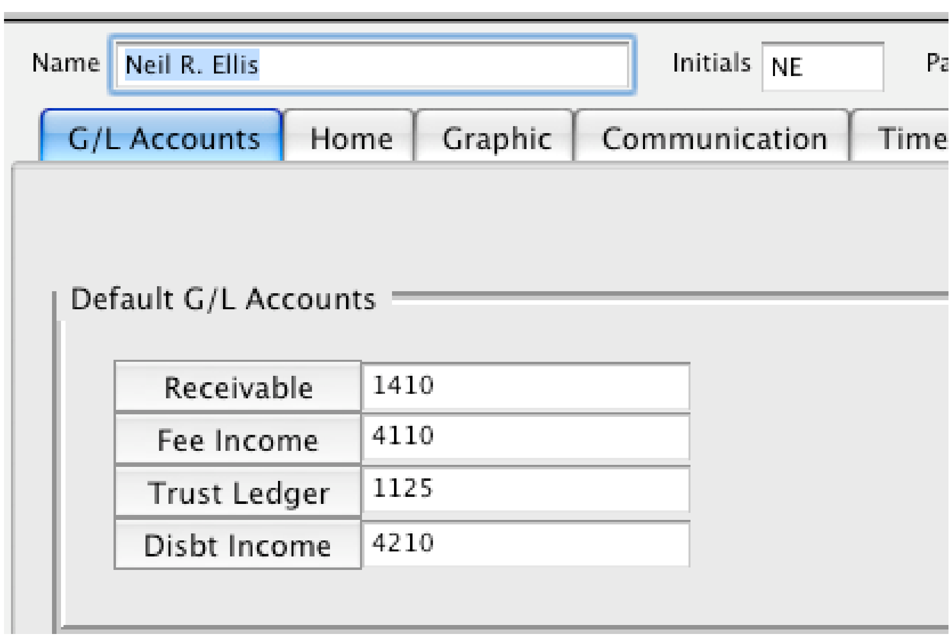
Other Levels of Security

It has been said that locks are only able to keep honest people out of your house. The same thing might be said about security in software. If you use password protection in LawStream, you will be able to prevent others from signing-in in with your initials. Others could still see information about you, in many of the reports produced in LawStream. If you really want to be sure that certain types of data are limited to certain people, then you must also implement other security measures in LawStream.

Nickname: In a very few instances, LawStream will refer to this word in messages and notices. If your name is Theodore, you might key the word "Ted" into this field, to make LawStream start some of those notices with the word "Ted".

2.4.1 G/L Accounts Sub-tab

Along with defaults for the entire firm (and other levels of defaults), it is common to have default general ledger codes for individual lawyers, (e.g., when it is advisable to track separate receivables and income amounts.



Here you can set the appropriate G/L accounts for Receivables, Fee income, Trust Ledger and Disbursement Income by user. These account defaults are often the same as the firm's default accounts, but in some circumstances you may want them to vary by user. To edit the accounts, first click on the edit button in the right side toolbar, then click on the box with the word (i.e. Receivable) to make a pop-up window appear with a list of all of your firm's G/L accounts. You can click on the appropriate account in the list and click OK. You can also just key the account number into the field.

If you firm has opted to use "Cash Accounting", you may see two sections of defaults: the top section refers to defaults for standard (accrual) accounting, and the bottom section refers to defaults for cash-based accounting. You will be expected to refer to only one of those sets of defaults. More information on the choices for accounting defaults can be found in the chapter of this manual dealing with accounting principles.

2.4.2 Home Sub-tab