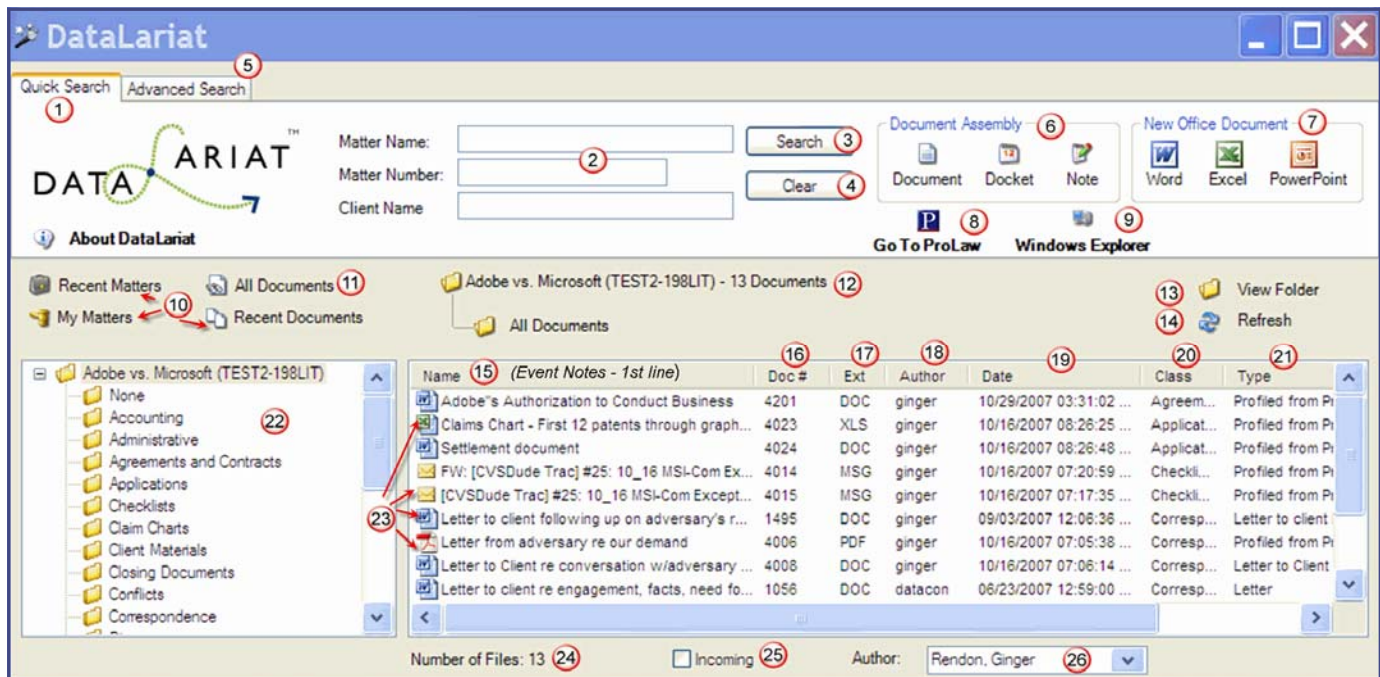


Everything You Need to Create and Manage Work from an Explorer Interface



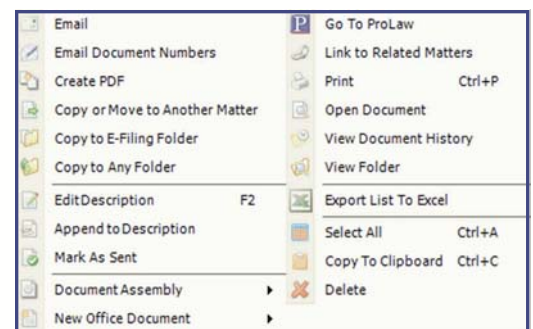
- (1) **Quick Search** Find matters by typing part or all of their (2) description, matter id or client sort. ProLaw's ® wildcard % works in all search fields.
- (3) Starts the **Search**.
- (4) **Clear** search criteria.
- (5) **Advanced Search** Narrow searches for matters you found on quick searches by adding criteria here — or Clear Quick Search and use to find any ProLaw documents.
- (6) **Create new work** using ProLaw's Document Assembly, Docket entries or Notes.
- (7) **Create Microsoft®** Word, Excel and PowerPoint Documents from blank screens in those programs.
- (8) Go to the ProLaw Matter selected.
- (9) **Windows Explorer**—Browse to a directory; open and copy from documents; or drag multiple documents to folder in Matter to profile. **DataLariat** fills in profile with document date, event notes (name of docu-

- ment), matter id, selected author).
- (10) **My Matters, Recent Matters, Recent Documents** (Worklist) as set in **ProLaw** preferences and Worklist.
- (11) **All Documents for matter selected** (not for ALL Matters);
- (12) **Active Matter** Description & ID, Total Documents and Event Class.
- (13) **View Folder**—When selecting All Documents, many folders may contain documents. Click to view just the folder of selected document.
- (14) **Refresh Screen**.
- (15) **Sort Documents** by clicking a column heading. **Name is** (first 60 characters of event description). Stars indicate a document cannot be found.
- (16) **ProLaw Document No.**
- (17) **File Extension** of Document.
- (18) **Author** or user shown in Initials field of ProLaw document profile
- (19) **Date of Document**.

- (20) **ProLaw Event Class**.
- (21) **ProLaw Document Type**.
- (22) **All Event Classes Possible** for Matter Selected.
- (23) **Search Results**—Icons are for program from which document created.
- (24) **No of Files** in event class selected.
- (25) Adds **(In)** to end of Event Notes.
- (26) Current **Author**.

Right Click—Shortcut Menu

(Right click in Search Results list to access)



Outlook—Profiling E-mails, Attaching ProLaw Documents

Outlook —Saving to ProLaw

At **Outlook Email** list, select emails to profile; then click the **DataLariat Email** toolbar.

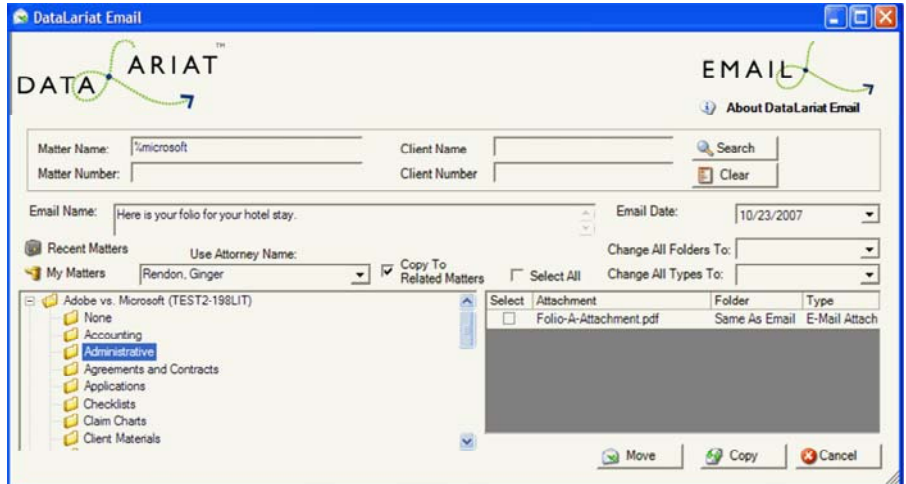


When the **Search Window** appears, find the **Matter**, click the appropriate **Folder (Event Class)**.

By default, (In) is appended to the event notes for **Incoming** mail, but you can change this to **Outgoing** or **Nothing**.

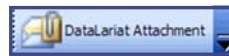
Select **MOVE** (not Copy) to send the email to Outlook's Delete folder. This allows you to clean up the Outlook storage as you go.

To profile **attachments** separately, click the **Select** field next to the attachment name. **Rename attachments** by typing over the name.



Attaching ProLaw Documents

From within a **new** email or reply, click the **DataLariat Attachment** toolbar to open a search screen.



Search and select one or more documents to attach using **Shift Click** or **Ctrl Click**. The document **Name** shows in the email as the first 60 characters of the **Event Notes**.

Office—Creating, Profiling, Editing from Word, Excel, PowerPoint



Office Toolbar Functions

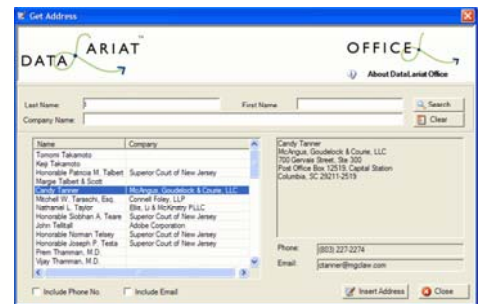
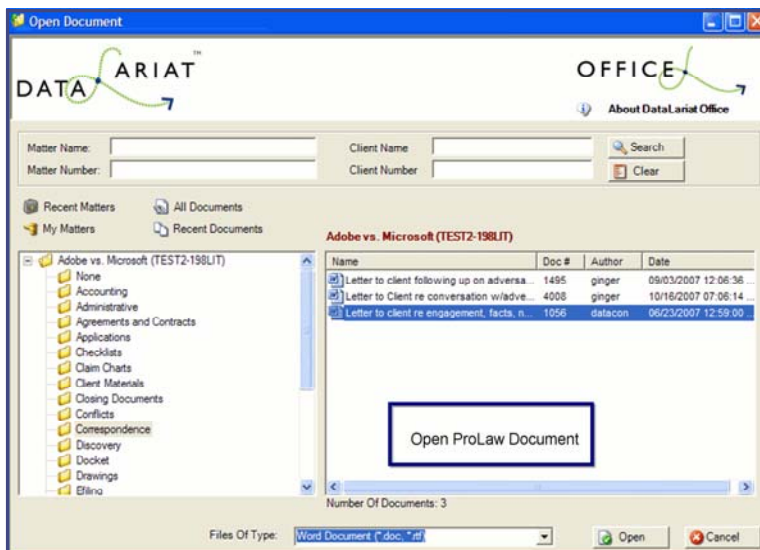
New ProLaw Document—starts a blank document. Adds document number using file name field in Word.

Save in ProLaw—For documents created in the application or existing outside ProLaw. The first save appears the same as a **Save As** function.

Save As in ProLaw same as Save in the first time a document is saved; use to copy to a different matter.

Open ProLaw Document—search for and open to edit or copy from ProLaw documents. **Note:** From within any of the Office Pro-

grams, the **Open ProLaw Document** defaults to files of the same type as the application (only .doc or .xls or .ppt extensions) matching the search criteria. Although you can change the **Files of Type** field to see a list of documents matching the search regardless of extension, only files with the same Office application extension can be opened.



Get Address—Search for ProLaw contacts; include address, telephone and email in document (Available in Word Only).

Email Document Number—First save the document in ProLaw (**Save in ProLaw**). Then click **Email Document Number** to start an e-mail that contains a hyperlink to the document along with its description and date. Useful for internal editing.

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