

Troubleshooting

Untranslatable Character

This means that the WordPerfect Document contained, probably, 'Smart Quotes' or some character that did not translate into the ASCII character set. Simply OK the message. The offending character is replaced with a 'box' (check the OCR data if you wish). This message is just to notify you that the character(s) could not be accurately stored.

'Return to VLO' box does not appear when WordPerfect Runs

VLO and WordPerfect communicate using VERY advanced technology, in which WP is the 'server'. Sometimes WP becomes unstable in this relationship, and the communication becomes disjointed and/or garbled. Exit VLO AND WordPerfect, and re-start. If this still doesn't fix the problem, exit all programs, shut-down, and re-boot. You've probably lost the document you were working on, however. Try using a frequent backup interval in WP, saving the recovered work as a 'temp' file, and re-inserting the temp file in your work under VLO.

Scanner Program 'Pops-Up' when I put a sheet of paper in to be scanned

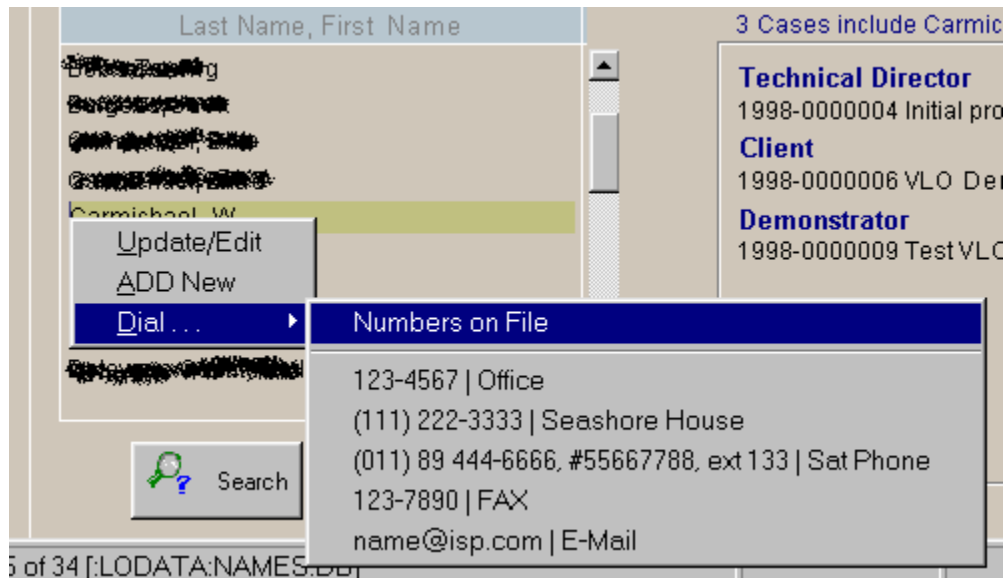
Most scanners come with auto-detect software that knows when paper is placed in the scanner to be scanned, and a 'management' program runs. VLO does NOT use this program and it is totally unnecessary for VLO.

The scanner management program probably has a 'switch' that disables this feature, or there is a setting that you can tweak to achieve a quiet scan. Contact the hardware/scanner software vendor(s) if you can't find the shutoff.

VLO - Overview

In General

VLO represents a step in giving the solo or small-firm practitioner the 'edge' in today's fast paced and competitive legal market. It is the first real attempt to create a computer system that is programmed to work the way practicing attorneys work, not the way that a system designer *thinks* an attorney should work. VLO makes extensive use of the 'Right-Click' capabilities of your mouse, so popup menus can be used virtually anywhere.



General Capabilities

- Image Management
- Document Management
- Seamless integration with WordPerfect
- Automatic Document preparation
- FAXing capabilities with WinFax Pro
- Full-Text document searching
- Litigation Support
- Automatic, Background time capture
- Accounts Receivable and Billing
- Conflict tracking

Case Management
Calendaring/Scheduling
Support Staff Features
Phone Messaging
Case Narrative maintenance
Name, Address and contact number maintenance

Image Management

VLO accepts multi-page images from TWAIN-compatible scanners. The images can be 'linked' in various fashions (by case/name/document types) and utilized by multiple persons at the same time. The images are stored in a proprietary format, using, normally, a proprietary compression algorithm, which makes it difficult for anyone to alter the documents casually. VLO normally stores documents in black-and-white to minimize storage requirements (each full page of typewritten text stores in approximately 25K) but can also store 24-bit color images.

Document Management, Seamless Integration with WordPerfect, Automatic Document Preparation, and Support Staff Features

VLO uses a direct connection with WordPerfect that no longer requires elaborate file naming and storage rules. VLO stores the document and, just as with Images, the document can be 'linked' in various fashions. The documents are immediately available for full-text searches and utilization by anyone in your firm.

Many 'items' of VLO data are directly placed into your documents, INCLUDING significant letter-writing capabilities, e.g., the automatic preparation of labels/envelopes; designation and printing of 'cc:'s'; and printing of enclosures as necessary. Since you specify the Letterhead (in color, if you have a color printer), as well as the information to be contained in specific correspondence, you can custom-design Letterhead for yourself.

These features of VLO increase the productivity of support staff or, if you're a 'true' solo, greatly simplify administrative correspondence tasks.

Automatic Time Capture

Since, conceptually, all documents involved with a case are available on VLO, VLO can capture all actions taken on a case which are taken through VLO. This includes returning telephone calls, reading/reviewing documents, etc. VLO automatically tracks the time spent on all these tasks (subject, of course, to your review at billing time). In addition, VLO writes pertinent entries to the Case Narrative.

Whether you use hourly billing or not, the reports available in VLO can alert you to profitable (or non-profitable) legal and administrative tasks that can have significant impacts on your practice.

Virtual Law Office - Document Buttons

Standard Document Buttons



These buttons are generic throughout VLO.

They function as follows:

SCAN - allows scanning of new documents from a TWAIN source.

VIEW - allows you to view the document, whether it's a scanned image or a WordPerfect document.

PRINT - allows printing of the selected image or WordPerfect document, or viewing the printed image on-screen.

CC: - Carbon Copy. Allows you to link a document to an unlimited number of Names/Cases.

OCR - Allows you to use your OCR scanning software to store the text of a scanned document for full-text searches. The text for WordPerfect documents is stored automatically. You may also type text that you wish to be available for full-text searches.

DELETE - Deletes the link between the document and the current Case/Name, etc. This Button does NOT delete the actual document.

Virtual Law Office - Case Update

Opening, Changing, Closing Cases

This screen allows you to Close an existing case by clicking the 'Close This Case' button on the 'General' tab. The button will then change to 'Re-Open This Case' and a prominent 'Closed' marking will appear.

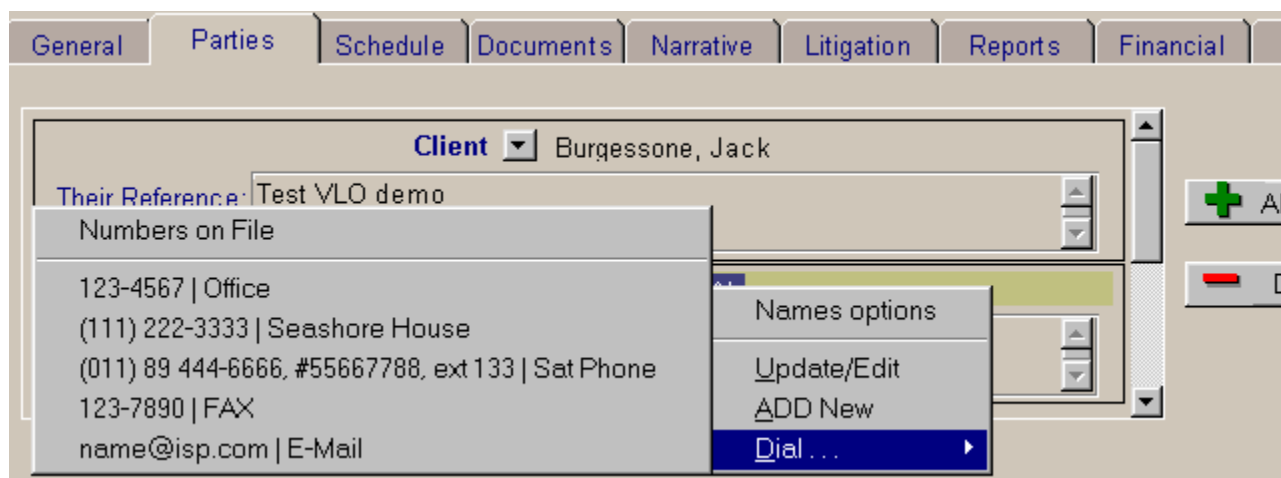
Closed cases may ONLY be accessed through the Names/Cases tab on the Main Screen, and do not appear whenever you look up a case. Closed cases are NOT deleted from the system, so you can always determine possible conflicts or search the documents associated with a closed case.

To open a New Case, click the 'OPEN New Case' button. YOU MUST HAVE A CLIENT FOR EVERY CASE (assigned on the 'Parties' tab). The more information you can enter when you establish a new case, the easier it is later.

Parties Tab

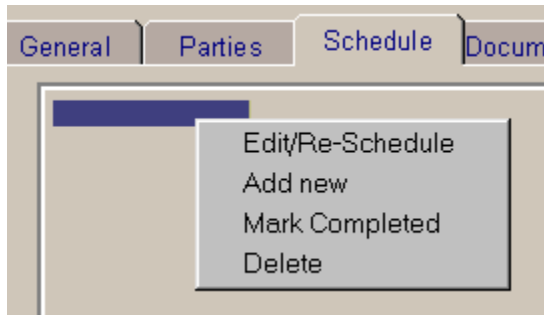
The Parties tab allows you to associate any Name with this case. To associate a Name as a Party, click the ADD New button, select the Role for that Name. Name editing and adding is available from a right-click menu.

NOTE - ALL CASES MUST HAVE AT LEAST ONE 'Client'.



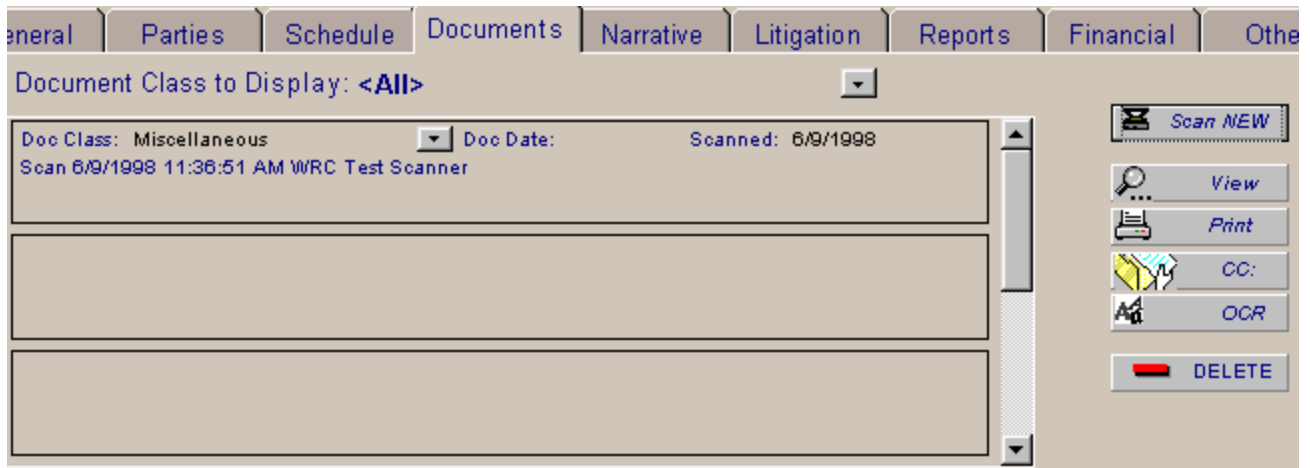
Schedule Tab

This tab allows you to add/change/delete entries in your Schedule associated with this Case. Right-click for updating options. The resulting schedule item also appears in your daily schedule on the Main Screen.



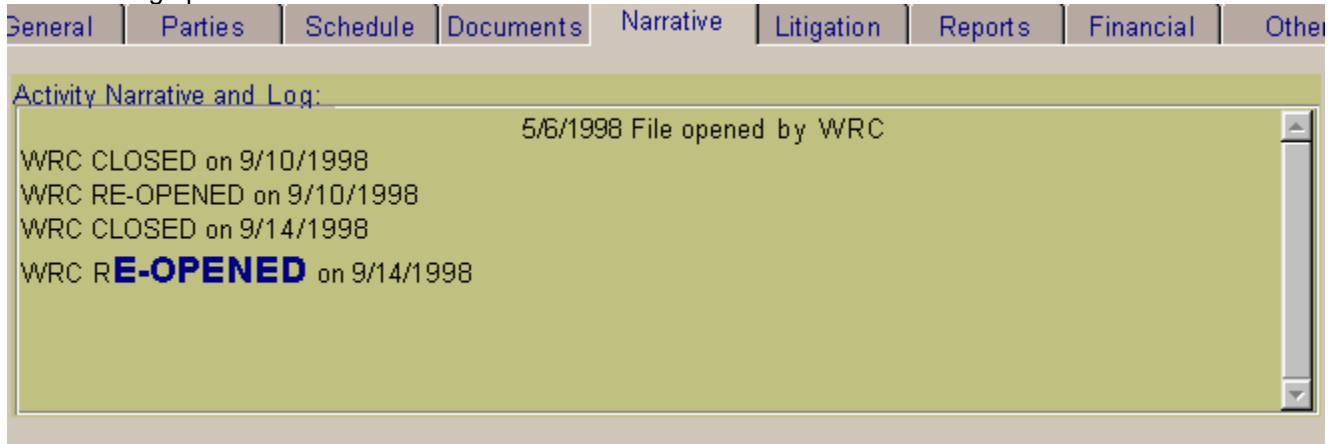
Documents Tab

This tab allows you to add/change/delete Documents (Scanned and/or WordPerfect) associated with this Case. Also, buttons are available for scanning documents DIRECTLY to this case (the documents do NOT appear in the InBox). If you want to scan Documents to the InBox, use the menu "Document Management". You can specify the Case there when scanning, if you wish.



Narrative Tab

This tab allows you to add/change/delete entries in the Narrative associated with the Case. Right-click for formatting options.



Litigation Tab

This tab allows you to prepare a case/witness outline, respond to document requests, note opposing party's responses to document requests, and otherwise help to prepare a case for Trial. This tab also allows you to 'Take a Case To Court'.

General	Parties	Schedule	Documents	Narrative	Litigation	Reports	Financial	Other
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<i>Trial Outline</i>	<i>These functions allow you to use the information generated or maintained by VLO to assist in Trial preparation.</i>
<i>Respond to Doc Request</i>	<i>Use Trial Outline to organize the legal and factual concerns in your case;</i>
<i>Reports . . .</i>	<i>Use Respond to Doc Request to comply with document discovery and disclosure requirements;</i>
<i>Take a Case To Court . . .</i>	<i>Use Reports to print Outlines, Documents, Witness and case checklists, and cross-reference trial materials with discovery;</i>
	<i>and, use Take a Case to Court to place all this information at your fingertips in court.</i>

Virtual Law Office - Names and Addresses

Name and Address maintenance

This screen permits you to maintain the information on a particular Name.

You CANNOT DELETE A NAME/ADDRESS RECORD! You can, however, mark them as "INACTIVE" which will cause the particular entry to appear in red on any name lookup.

Because you can not delete a Name record, future conflict checking will be much more thorough and complete.

Virtual Law Office - Scheduling

Scheduling

This screen allows you to schedule activities. You can note that the scheduled activity concerns a particular Name/Case. If attached to a Case, the entry will also appear on the Case's Schedule tab.

Note: Schedule items are assumed to be Billable activities. If not removed/marked Completed, the activity will show up the following day in your In-Box as an unresolved item. The scheduled activity will remain there until you resolve it.


Virtual Law Office - Bug Reports

Reporting Bugs/Making Suggestions

Naturally, we all wish all of our software was perfect, ran without any problems, and was so clearly designed and intuitive that it would never crash and we would never need to have any questions resolved.

Unfortunately, a slight reality check will quickly remove any such notions.

Therefore: Should you have any problems OR suggestions OR comments for us, whatsoever, please

enter your thoughts as soon as possible on a Bug Report, accessed through the Toolbar  and stored in VLO.

Periodically, print-out the Bug Report (on the Reports|Select menu) and send it to us. All your comments, etc. will be reviewed closely by us.

Virtual Law Office - Litigation Support - Case Outline

General Approach to Litigation Support

It is the goal of VLO to make organizing and presenting a case at a trial or hearing easier, more complete, less stressful, and faster for the solo or small firm attorney. VLO attempts to accomplish this by primarily addressing the administrative drudgery of prepping the case.

VLO cannot and does not address the art of advocacy.

The Case Outline

As all attorneys know, actions are usually divided into 'Counts' in a complaint, or into specific similar areas in Motions. Whether or not the action is *physically* so divided, it can be *Logically* divided into 'Counts'. That is, a Complaint may allege 'Fraud' or 'Breach of Contract' or 'Negligence', etc. Each Count has one or more 'Elements' that one side has to attempt to prove and the other disprove. These 'Elements' have various 'Methods of Proof', to be actually presented at Trial in various ways (Live Testimony, Judicial Notice, etc.), either by direct or cross, that tend to prove or disprove one or more Element of the Count. As an illustration:

Count 1 - Negligence

Element 1 - Duty

Method of Proof 1 - Motor Vehicle Statute section 5115(a)(1) - Stop Signs

Element 2 - Breach of Duty

Method of Proof 1 - Testimony of Traffic Reconstruction Expert

Method of Proof 2 - Police Photographs of Accident scene

Method of Proof 3 - Testimony of Plaintiff

etc.

VLO allows the attorney to establish these relationships: For example, for 'Breach of Duty' element in the above illustration, the trial attorney might enter the following:

The screenshot shows the VLO software interface. At the top, the case name is displayed as "Case: [Redacted] v. [Redacted]". Below this, the "Count/Issue:" section contains a list of navigation buttons (back, forward, home, end) and a plus/minus control. The current count/issue is "Negligence". Underneath, the "Elements for this Count/Issue:" section shows a list of elements: "Duty" and "Breach of Duty". The "Breach of Duty" element is selected, and a context menu is open over it, showing options for "Methods of Proof . . ." and "Delete".

Methods of Proof

Count/ Issue: Negligence
 Element: Breach of Duty

Live Testimony Name: Investigating Officer Johnson
 XRef Description: Photos of accident scene Doc Page #:
 Question: Establish authenticity of photos for admission . . .
 Cite:

REPORTS

The attorney may then print these relationships in many ways:

- An outline of the entire case, showing each Count and all Elements;
- An outline of the entire case, showing each Count and all Elements and the Methods of Proof for each Element;
- An outline of the entire case, showing each Count and all Elements and the Methods of Proof for each Element;
- Organization by Type of Testimony;
- Organization by Witness;
- Organization by Witness with a cross-reference to Elements/Counts (very useful at the end of the Plaintiff's/Prosecution's case, or of Trial, to check sufficiency)

VLO additionally allows the Printing of Documents that relate directly to each item of testimony/Method of Proof, either by the witness and/or by preparing a 'Packet' of documents that are/may be required at trial. Cross-references to pages of this Packet are listed (if a Packet was prepared, of course) with the Method of Proof/Witness.

Virtual Law Office - Linking Documents

Electronic "Filing"

Since VLO uses a relational database to store data, individual documents can be 'filed' in an unlimited number of places. VLO allows you to "CC:" a document with any Name(s) or Case(s) you wish.

If the document is already "filed" with the selected Name/Case, VLO will tell you but also will give you the option of linking the document again, anyway.

Use the Lookup button to find a Name that you want to file a copy of the document with; the list of open cases will pop-up. Select a Case if you want to file a copy with that Case.

If a Name is selected, the "Link to Name" button will be enabled; If a case is selected, so will the "Link To Case" button. Otherwise, the buttons are disabled (greyed-out).

To file a copy with a Name or Case, simply click the appropriate button. After 'filing', the button will again become disabled.

Virtual Law Office - Full-Text Searching

Full-Text Searches

This screen allows you to search Document Descriptions, OCR text, or both, for the occurrence of specified words or phrases. It also allows you to specify the SCOPE of the search. Scopes are : All documents; One Name; One Case; All Names associated with a Case; etc.

If no search words are specified, VLO returns all documents within the scope of the search.

Search Words

Multiple words may be entered for search purposes. Alternate words may be separated by commas. Think of the comma as "OR". Thus, a search phrase of 'litigation' will search for all documents that contain the word "litigation" in their Document Description, OCR data, or Both.

A search for "Litigation, trial" will return all documents that have EITHER word in their Description, OCR data, or both, depending on the selection you've made.

After completing the search, all documents found will be displayed on the Document Selection screen. There, you can View, OCR, or CC: any document by selecting the document and Right-clicking.

Virtual Law Office - Selecting Documents

Search Results

This screen appears with the results of any Document Search.

Sometimes, e.g., when selecting Enclosures for a Letter or a Document that forms the basis for a particular witness' testimony, VLO expects you to have selected one or more of the Documents that were found.

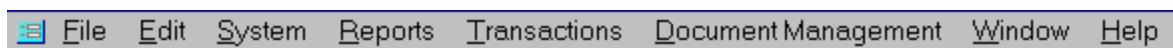
Highlighting the document and clicking the 'Copy' button (> or <) move the document from Documents Found to Documents Selected, or vice-versa. You can also "Copy All" (>> or <<) documents from one column to the other.

Right-Clicking on a document allows you to View, OCR, or CC: the document.

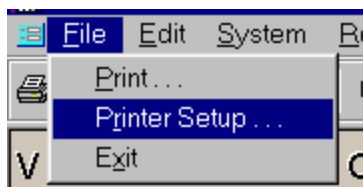
Virtual Law Office - Main Menu

The Main Menu

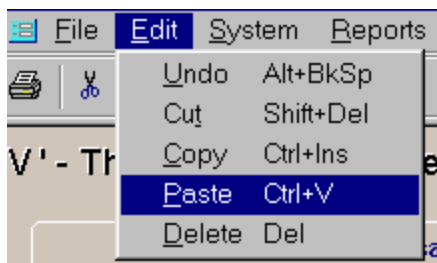
VLO has a Menu that is visible from virtually any screen in VLO.



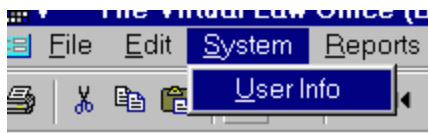
File Menu:



Edit Menu:

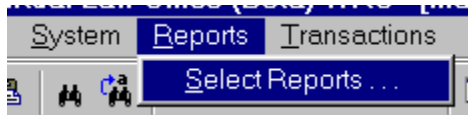


System Menu:



This menu selection allows access to your System Information.

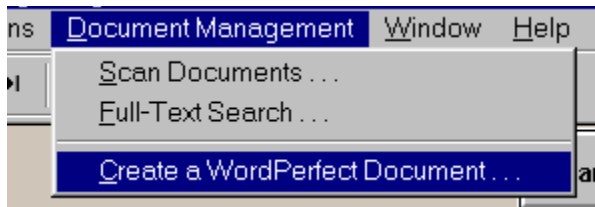
Reports Menu:



Transactions Menu:



Document Management Menu:

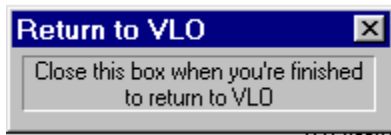


Virtual Law Office - WordPerfect Interface

WP and VLO communicate very directly and accurately.

There are absolutely NO changes in the way you work with WordPerfect, EXCEPT:

1) NEVER close a file; instead, use the 'Return To VLO dialog box:



2) Don't worry about saving your work as a file - VLO handles all of that for you.

Virtual Law Office - Parties

Definition

A 'Party' is simply a Name that is associated with a Case IN ANY MANNER, e.g., as a Judge, a Witness, Opposing Counsel, etc.

Virtual Law Office - Viewing Scanned Documents

Image viewing

Scanned documents are viewed with this screen. You may change the document description, rotate the document (in increments of 90 degrees), or change such image characteristics as brightness, contrast, or sharpness. You may also Zoom the view.

If you change the Description or any of the image characteristics, VLO asks you if you want to save the changes.

Note: Changing the Sharpness of an image is a relatively length process. The cursor will change to an animated "V1" icon while the process occurs.

Virtual Law Office - Unknown Field Prompt

Undefined <Designator> in a Prototype

This screen appears if you are creating a WordPerfect document and VLO is unable to supply the information requested. You may enter the applicable information by hand, or, by Right-clicking, enter a Standard Phrase.

You may have intended that this occur, or VLO cannot supply the requested information because, for example, the 'Bill' prototype was selected from the Create a WordPerfect Document screen.

Prototypes must conform to their context, and VLO is unable to supply any such information if the context is incorrect or inappropriate.

Generally, any information that appears on the 'Paste' dialog box when you're changing any prototype except 'Bill' can be supplied by VLO from the Create a WP document screen.

Virtual Law Office - Obtaining OCR data for Documents

What is OCR?

OCR stands for 'Optical Character Recognition', and converts graphic images to data that can be manipulated or searched. If you have a Scanner, chances are that you also have OCR capability, supplied from the scanner manufacturer. There are also commercially-produced OCR programs that produce text output from graphic images.

How does VLO use OCR data?

VLO stores the OCR'd data for each document with the document, and you can use the data for Full-Text Searches. You only need to OCR data that has been scanned; VLO automatically reads and stores the text data for every WordPerfect document you create.

Can I put data that has not been scanned into the full-text search?

Yes. VLO permits you to use the standard "Edit/Copy" and "Edit/Paste" commands of Windows to place data into it's fields. VLO also allows you to insert the data from a text (".txt") or formatted data from a Rich Text File (".rtf"). Simply Right-click on the field you want to place the data for options. Since most/all Court Reporters will provide you with a text or RTF file of transcripts on a 3 ½" disk, this capability is especially handy.

What is "Permanent Text" and how is it used?

The 'Permanent Text' field contains data that is never overwritten. This is useful, for example, for storing specific key words or phrases that you wish to place in documents. Permanent text is always appended to any text that was/is stored in the 'Text of Document' field. OCR data is normally placed in the Text of Document field, and it can over-write whatever was/is there.

Caveat: Since the Permanent Text is always appended to data in the Text of Document field, it may appear there more than once, and, if you have deleted text from the Permanent Text field, **THE OLD PERMANENT TEXT WILL REMAIN WITH THE DOCUMENT UNLESS YOU DELETED THE TEXT FROM THE TEXT OF DOCUMENT FIELD MANUALLY.**

How can I number the pages within the text?

You must either number them manually, e.g., place a "Page #" in the appropriate position, or have the person supplying you with the text/RTF file include them in the document. Please note that **the Text of Document field may be over-written if you OCR new data into the field!**

Virtual Law Office - Preparing a WordPerfect Document

Overview

This screen is the primary access for VLO to your WordPerfect Prototypes that are defined in the System Information screen for your User ID.

You MUST enter the Prototype, the Destination In-Box, and the Paper Type on the General tab.

General Tab

The General tab supplies VLO with information required for later Printing. It also allows you to specify a Case, which in turn allows automatic filing with that case when the job is Printed. In addition, if a Case is selected, your choice for Addressee and persons to receive copies is restricted to Names connected with that particular case.

Specific Tab - Addressee

This allows you to specify the Addressee for a particular document, and lets VLO supply the pertinent information. You may notice that the <fieldDesignator> replaces regular text in the label for each field. If a Case was selected, <TheirReference> is automatically filled-in, as are all other fields.

Specific Tab - Text

This is where the 'body' of a letter or other document is entered. By Right-clicking, you can enter a Standard Phrase.

Specific Tab - Enclosures

This allows you to select multiple documents to include with your document. Clicking the 'Search Documents' button brings up the Full-Text Search screen and the subsequent Document Selection screen. You can change the descriptions after WordPerfect assembles the document.

Specific Tab - cc:'s

This allows you to select Names to receive CC:'s of the document. Lookup the Name; select whether or not to include Enclosures with this person's copy, and click the move button(<) to make it a cc: recipient. Select and Right-Click on a recipient that you wish to remove from a cc: list.

VLO - Main Page

Schedule Tab

This tab shows your schedule for today. Right-clicking allows you to Add, Change, Delete, or Re-Schedule an item. The Weekly page shows your schedule for the current week.



Clicking on the Calendar icon shows a pop-up calendar to pick a date to display.

Inbox Tab

Documents to Review/Edit

This tab shows the documents that were scanned for you as well as WordPerfect documents that you're working on and which haven't been printed. For an explanation of the buttons, see [Document Buttons](#).

Right-Clicking gives you options to send the InBox item to another user (e.g., to your secretary for spell-check/printing, etc.) or to print the completed WordPerfect print job.

Unresolved Items

Items that were unbillable when VLO timed your activities (usually because a case was not referenced) appear here to allow you to bill. In addition, unresolved appointments may appear here.

Phone Calls Tab

These show telephone or other messages taken for you. You may return the call or simply delete the message and ignore it.

Names, Addresses and Cases tab

This tab displays all names and cases that are in your database. If you double click on a case, it will be selected for individual attention on the [Case Update Screen](#). If you double click on the Name, the [Name Update Screen](#) is selected for that Name. If you right click on the Name or the Case, additional options will be given. This is the only screen from which you can access closed cases.

Virtual Law Office - Making a telephone call

TAPI

TAPI stands for 'Telephony Applications Programming Interface', and is the standard for interfacing under Windows. If you've installed Windows fully, and configured the interface correctly (and, of course, have a modem), VLO will dial the number for you and time the call. Moreover, if you select a Case, the call will be billed accordingly. You may also browse the case you selected.

TAPI is correctly configured if you can use the Phone Dialer supplied with Windows (under Accessories) to dial.

If you do NOT select a case, the call will show up in the 'Unresolved Items' tab of your Main Screen the next time you log-on.

Virtual Law Office - Basic Report Data Selection

One/All Case or name

This screen is the 'jump-off' point for most reports under VLO. If the report permits specifying one Name or one Case, or, in some cases, requires it, the selection is made here.

If the report requires a selection, you will receive an error message unless a selection is made.

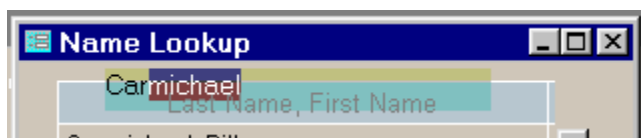
Click the 'Print' button to run the report.

Virtual Law Office - Name Lookup

The ubiquitous 'Name Lookup' form

This screen is the most commonly used screen in VLO. Since VLO uses the name of any person connected with a Case to specify a Case, and since you can perform other functions from this screen, it is useful to give a detailed explanation here.

The 'Shadow'



By typing, this screen attempts to locate a particular Name. Pressing 'Enter' ends the incremental search.

Adding a new name

If the name you're looking for does not appear, you can ADD a new Name from this screen, either by Clicking the 'Add' button or by using the Right-Click menu, below.

The Right-Click Menu

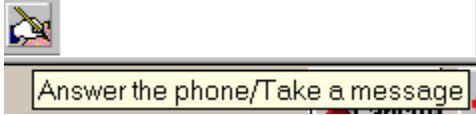


This menu is displayed when you Right-click on a Name. The Dialing option is sometimes disabled, when it is impossible to allow dialing. However, you can always ADD or UPDATE a Name.

Virtual Law Office - Telephone/Other Messages

Messages

This screen is invoked by clicking on the 'Take a Message' button on the Toolbar.



Anyone can take a detailed message for anyone else. If you Right-Click on the Return Number field, all the numbers for a Name appear - select one. Also, if you Right-click on the Case field, all open cases are displayed for your choice.

Don't forget - you can UPDATE a Name from the [Name Lookup screen](#).

Virtual Law Office - Printing a 'Job'

Purpose

All attorneys prepare MANY pieces of correspondence every day. That's why VLO paid special attention to the task of composing and printing routine (and, not so routine) correspondence/memos.

This screen can print envelopes and labels (Avery 5163 or equivalent), the 'original' document and copies for all persons CC:'d, and all enclosures for a particular piece of correspondence.

If you have WinFax Pro installed, it also looks for a FAX (capitalization is important) number to FAX the correspondence, if possible. If any recipient does not have a number labelled 'FAX', VLO will notify you.

This screen also 'files' the original and copies of the original with the addressee, the Case, and the CC:'d recipients, if desired. NOTE: it only files ONE copy with each.

Virtual Law Office - Report Selection

Generalized Reporting

This form is the gateway to reports in VLO. As you can see, the form has a Main Classification, a Median Class, and a specific report.

The 'Print' button will not appear until you click/select an individual report.

An explanation of the Report is given in the Description.

This form is invoked by the Main Menu|Reports choice.

Virtual Law Office - Scanning Documents

Scanning in General

Scanning is used by VLO to collect any documents that you have not created through the VLO-WordPerfect interface. The documents can be scanned to someone's In-Box for later review and 'filing' or they can be scanned directly to a particular Case or Person's records.

VLO works with all TWAIN-compatible scanners, whether they scan multiple pages at once (sheet-fed or multi-page scanners) or if they only scan one page at a time (flat-bed).

Multi-Page Scanning

When the Scan Document screen appears, fill-in the applicable data and click the "Scan" button. VLO can handle the input stream of however many pages you've scanned.

Single-Page Scanning

Again, Fill-in any applicable data and click "Scan". You'll have to click "Scan" again for each page.

Image Description/Naming Conventions

VLO requires that EVERY IMAGE HAVE A UNIQUE DESCRIPTION! There is a default name which contains unique information for that Image. It is STRONGLY recommended that you NOT delete this information but, instead, ADD descriptive information to the default. This ensures that every image has a unique description.

Virtual Law Office - Stock Phrases

Overview

This form allows you to specify 'Stock' or 'canned' phrases or longer text that you might wish to insert in the text of documents.

This form may also be invoked by the System|Stock Phrases menu choice.

All phrase references must be unique.

Virtual Law Office - System Information - User

User Specifications

ONLY USERS LOGGED-ON AS 'FIRM' CAN ADD A NEW USER!

Customize anything except your User Initials. You should change your password at this time. Multi-Line fields can contain font formatting by Right-Clicking and selecting Properties.

Then, customize the other information:

Office tab

Enter your Office Address, replacing the existing text.

Envelopes tab

Customize the Return Address (Right-Click for Properties of the font, typeface, etc) by entering your return address info. This is printed on envelopes. If you are using pre-printed envelopes, enter a space here, without formatting. MAKE SURE THERE'S AT LEAST A SPACE IN THIS FIELD.

Customize the Sample Text for the addresses on envelopes. Of course, 'Sample Text' does not actually print, but this field tells VLO the font, size, and typeface you want to use for addresses on envelopes. Leave some text in this field, too, formatted as you'd like addresses to be printed. The properties are applied on the whole address.

Labels tab

VLO uses Avery 5163 labels for printing addresses, and combines the return address and the Addressee's address on one label, separated by a green line. Therefore, your return address should not exceed 2 lines. Once again, right-click for properties.

Then, customize the Address properties if you wish.

Billing Info tab

Enter your default hourly billing rate.

File Info tab

Blank for now. (Used in Network version - being tested separately).

Prototypes tab

This is a unique feature of VLO. You can use any document as a prototype, but four are provided - a Blank Document, a Bill, a Pleading, and a Letterhead. Use the video bar to move among the prototypes.

Right-Click on the Prototype you want to customize, and you'll see 3 options: Delete; Create From File; and Use WordPerfect to Edit. Choose 'Use WordPerfect to Edit'. If you've installed correctly, WP will open (BE PATIENT) with the selected Prototype displayed, and a dialog box will come up in WordPerfect

that allows you to 'Paste' a field designator where ever you want VLO (or user-entered) information to appear, or, to return to VLO. Inspect all/any of the Prototypes, and make any changes you wish.

Note: The Letterhead prototype has a header that contains the date, addressee name, and page number. The Header is suppressed on the first page. If it should somehow re-appear on page 1, just use the Format/Page/Suppress options in WP to hide it again.

IMPORTANT ANNOUNCEMENT HERE!

You NEVER have to "Save" or "Save As" a WordPerfect Document in VLO! VLO synchronizes with WP by using dialog boxes. The 'Select and Paste' dialog boxes only appear when you're editing/creating prototypes; a simpler 'Return to VLO' dialog box is displayed at other times. Whenever, ALWAYS use the 'Return to VLO' button when you're finished with any document. If the dialog box disappears from view (and it should if you're working on the document), LOOK ON THE TASK BAR. Failing to follow this rule will result in failures, crashes, and/or data loss.

About field designators: All field designators are in the format <FieldDesignator>. VLO, of course, uses specific designators, and fills them if possible when a user is working with a document. You can create your own field designators anywhere on the prototype, and VLO will prompt the user to enter the information. VLO uses the field designator text as the title of the prompt, so be descriptive. For an example, see the Pleadings prototype. You can use any character(s) as a Field Designator, including spaces, EXCEPT: less than, greater than, and a backwards apostrophe ("<", ">", and "`").

Firm Log-On

Only users logged-on as 'FIRM' may add a new user or re-designate the locations of Image files.

Now, ADD a NEW User (Click the button on the General tab) and create a USER for yourself, using your initials. This will be your normal Sign-on. Don't forget the password. All information you entered for the FIRM user ID will be 'cloned'.

Click 'OK' and you'll return to the Main Screen. Click OK to return to the Sign-on screen. Log-on again using the new user ID and password.

Virtual Law Office - Year 2000

Year 2000 Compliance

VLO uses Paradox 8 as the DBMS (supplied with your WP8 Professional Suite) and the Corel Corporation has specified the manner in which Paradox 8 handles Year 2000 (Y2K) issues.

The Following is reprinted from the Corel Corporation's Paradox 8 reference guide Help file:

About the Year 2000

Corel Paradox stores its numeric format dates as four-digit numbers. Its lower date limit is 9999 BC and its upper date limit is 9999 AD. (All BC years are treated as leap years).

Two digit year numeric format entry and storage:

Corel Paradox provides two digit shortcuts when entering the year. Prior to Corel Paradox 8, if you entered a two digit date, Corel Paradox assumed you were entering dates for the same century as the system date. If the system date was 19xx, for example, and you entered 00-99 for the year, the date was assumed to be 1900-1999. You could override the century assumption by entering 4 digits for the year, for example 4/26/2047.

Corel Paradox 8 allows you to enter both 19xx and 20xx dates using two digit shortcuts. Corel Paradox 8 will automatically append "20" to any two-digit date entered as 00-50 (ex: 4/26/47 will be stored as 4/26/2047). It will append "19" to any date entered as 51-99 (i.e., 10/24/97 is stored as 10/24/1997). You can permanently override this 2 digit century assumption by entering all four digits for the year.

Reediting two-digit numeric format entry dates:

If you have entered a date using a 2-digit numeric format and then decide to reenter the last two digits either in the same session or after exiting and reopening the table, Corel Paradox 8 will NOT keep the century designation as originally entered. It will append the century according to the numeric format entry rule above. (i.e.: 00-50 is 2000 through 2050 and 51-99 is 1951 through 1999). For example, if you enter 12/18/97 (12/18/1997) and then change the last two digits to 47, the date will now be assumed to be 12/18/2047. Entering all four digits will permanently override these assumptions.

Two digit year text format entry and storage:

- If you have entered a two digit date into an alpha (i.e. text) field, and then restructure the table so that the alpha field is changed to a date field, Corel Paradox 8 will automatically append "19". You can permanently override this assumption by entering all four digits for the year.

- If you copy two digit text from an application like NotePad or from an Alpha field in any version of Paradox and paste it into a date field in Corel Paradox 8, then the text will be reformatted into numeric date format and will follow the numeric format rules above. Therefore, 00-50 will be treated as 2000 to 2050, and 51-99 will be considered 1951-1999. Again, if you want to permanently override these century assumptions, you just need to enter all four digits for the year.

Setting the date default to display four digits in Corel Paradox 8:

All dates can be set to a four-digit year display by default in Corel Paradox 8. In your Windows control panel, click Settings, Control Panel, Regional Settings. On the Date tab, set the preferred Short date style to M/D/YYYY. Click the Apply button and exit Settings. All dates will display as four digits by default.

Date functions:

Any two digit dates entered and edited in date functions append the century according to the numeric format entry rule above. (i.e., 00-50 is 2000 through 2050, and 51-99 is 1951 through 1999). Entering all four digits will override these assumptions.

Exchanging date information between Corel Paradox 7 and Paradox 8:

Opening or importing files:

Any Corel Paradox 7 files which contain dates can be opened or imported into Corel Paradox 8 and the original century implied will stick. Further, Corel Paradox 8 files which contain dates remain compatible (original century implied will stick) when they are opened in Corel Paradox 7.

Copying/pasting individual dates:

If you are copy/pasting individual dates (whether originally entered as two digits or four digits) from one version of Paradox to another and you want to have the original century assumed stick to the date, you must be sure to have set the Windows default display to four digits for the application sending the data. Otherwise, if the default Windows date display format is set to 2 digits, the two digit century assumptions are made based on the rules for the version of Paradox receiving the information. For example, in Corel Paradox 7, the assumed century would be appended based on the current system date. If the receiving application is Corel Paradox 8, the assumed century is appended based on the 00-50 and 51-99 rule.

Tips

- Both Corel Paradox 7 and Corel Paradox 8 offer an easy way to for you to tell what century is assumed when you have chosen a two digit Windows default display format.
- If your system date is set to 19xx, only current century (or 19xx) dates will be displayed with 2 digits. 20xx and other century dates will be displayed with 4 digits. (ie: 12/30/1988 will be displayed as 12/30/88. 12/30/2001 will be displayed as 12/30/2001.)
- With a 20xx system date only 20xx dates will be displayed with 2 digits. 19xx dates and all other century dates will be displayed with 4 digits.

Corel's Year 2000 Web site:

Corel Corporation has a Year 2000 policy Web site. For the latest information, feel free to visit the site at <http://www.corel.com/2000.htm>.

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Table Repair and Data Recovery

Backing Up Data

THERE IS NO SUBSTITUTE FOR REGULAR, PLANNED BACKUPS! Sooner or later, you WILL encounter a situation that is not recoverable and you will be forced to rely on your backup strategy. Data errors can occur for a wide variety of reasons, including but not limited to: hard drive failure; lightning strikes; a user simply turning off their workstation while still logged-on to VLO; bad sectors on a hard drive; network errors; transmission errors; etc., etc., etc.

Generally, experts recommend that you back up frequently. What does “Frequently” mean? It means that you delay backing-up AT YOUR PERIL, and that you risk permanent data loss for changes made in your data during the period that you delayed.

For most, a one-day data loss is considered acceptable. If this period is not acceptable to you, then back up more frequently.

Experts also recommend that you:

Test your Backups;

Keep at least three generations of backup sets (today, yesterday, and the day before);

Keep a copy of backups OFF-Site (in case of fire, etc.)

Table Repair Facility

VLO has a Table Repair Facility that can repair SOME errors, SOME of the time. The facility is accessible in two ways: If you are logged-in as 'FIRM', the facility is on the System Info|SYSTEM|Table Repair page; or, you can run the repair facility independently by double-clicking on the TableRepair.sdl file in the VLO directory through Paradox. NOTE: Table Repair expects the :WORK: alias to be set to the VLO directory and the :PRIV: alias to be set to the VLO\Private directory. You can set the aliases by opening Paradox and defining the aliases there. See Paradox Help for further information on these aliases.

Table Repair Facility first attempts to verify all VLO tables and fix some errors encountered. If it encounters tables with serious errors, it then makes a copy of the table, creates a new table, and attempts to re-load the new table with the old data. VLO then attempts to determine various key information and re-adjust your system. **THIS DOES NOT ALWAYS WORK!** If Table Repair Facility cannot repair/restore the data satisfactorily, then you will be forced to rely on your backups.

What do I Back-Up?

The VLO\Data folder and all files in it;
The VLO\Images folder and all files in it;
Any folders (and all files in them) that you may have moved Image files to.
The VLO folder itself.

You do not need to backup the files in the VLO\Private folder.

Virtual Law Office - Printing Document Responses

Document Responses

This screen allows you to print all/some of the Responses to Document Requests.

VLO handles automatic sequence stamping by adding a footer to each document in the format:

`<DocResponsePrefix Seq.# .N>`,

where *DocResponsePrefix* = the Prefix you previously assigned to the Response, e.g., "Plaintiff Jones' Response to Defendant Smith's First Document Request";

Seq.# = the Sequential Number VLO assigned when the document was selected;

N = the page number of the current document.

Example:

Plaintiff Jones' Response to Defendant Smith's First Document Request 3.1 for the first page of the third document;

Plaintiff Jones' Response to Defendant Smith's First Document Request 3.6 for the sixth page;

Plaintiff Jones' Response to Defendant Smith's First Document Request 1387.1 for the first page of the 1,387 th document;

etc.

FAXing

The VLO - FAX interface

VLO interfaces directly with WinFax Pro from this screen.

If you have entered a telephone number for any recipient as 'FAX', VLO will use that number to 'print' to WinFax. If there is no number, you'll be asked to enter one. If there is still no number, VLO will print the Main body and all Enclosures on the 'normal' printer.

Outgoing FAXes are normally scheduled for transmission with a 5-minute delay.

NOTE: You must check the transmission log to verify that a particular FAX was actually sent. There is no other mechanism at present that can substitute for the Mark 1 imaging equipment (your eyeballs).

