DOCUMENT IMPORT UTILITY USER GUIDE

iSQL LLC	User Guide

A Tool to Import Documents, E-Mails, PDFs and Photos
Into ProLaw

DOCUMENT IMPORT UTILITY USER GUIDE

WHAT'S NEW IN VERSION 6.30

In this version of the Document Import Utility, we introduce the ability to apply Matters Item Level Security to imported documents. You now can import email directly from Outlook – with very detailed profiling criteria available. You can delete items from the list of documents to be imported easily. You can navigate the Import Documents box easier. Drag and Drop of documents and Folders is now supported. You can limit the application to run as a single Active Directory Professional. You can configure what to do with the source documents (Move or Copy) and lock that selection down. You can create a parent Note for documents being imported. You have the ability to parse the MatterID and Event Class from the document path. Plus many other subtle features and enhancements.

WORKING WITH THE DOCUMENT IMPORT UTILITY

This program allows you to import Documents (including Outlook E-Mails, Photo files and PDFs) into ProLaw Matters from any networked drive, outboard hard drive, CD/DVD, or flash drive. One has the choice of copying the Documents to ProLaw or fully moving them from the source into ProLaw.

There is a choice to import Documents individually, in highlighted groups, or by folder. Documents can be assigned Event Types and Event Classes at the time imported. These assignments will affect all documents imported as a group. One can also predetermine the defaults for what will appear in the Notes Field for the imported Documents from within the Utility. The document date can be selected from the document creation date, last edit date or import date.

Note: Documents that are *Checked-Out* in ProLaw should be checked back in via the Events Module. Using this Utility to import checked-out Documents will create new Documents in ProLaw and leave the Documents that we checked-out in ProLaw in their checked-out state.

The office should determine the protocols for using the Document Import Utility. This is important to maintain consistency in how this program is used. The purpose of this manual is to show how to use the Utility.

METHODOLOGY

To import Documents into ProLaw, follow these steps:

Steps

1) Select whether you want to copy or move the Documents from their source directory.
2) Select whether you want to exclude documents over a designated file size.
3) Select the File or the Folder where you will import from.
4) Select the Matter ID for the Matter you will import into.
   - The *Use Search Assist* checkbox will give you a pop-up window of Matter that match your entries. The pop-up window includes the Matter Description.
   - Without checking *Use Search Assist*, a field will show with a listing of Matter IDs only. No Matter Descriptions show on this list.
   -
5) Select the fields you need to associate a Document as an Event in ProLaw:
   - Enter the Professional for the Document or Documents to be imported
   - Enter the Document Type
        i. Start typing and a list of available Document Types that match what you have entered will pop-up.
   - Select the Event Class for the Document from the Event Class field drown-down list
6) Use the Default Note Lines 1 and 2 and the Custom Note Lines 1 and 2 to pre-set the naming conventions in ProLaw for the documents imported as well as any customization needed.
7) Select the Event Date that will show in ProLaw from the drop-down menu.

Once you have set the Document Import Utility, your pre-sets will apply to all the documents you have chosen to import.

How to Use Document Import Utility

1. Open Document Import Utility by double clicking the desktop Icon:
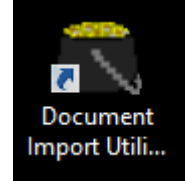
2. You do not need to have ProLaw open to use Document Import Utility nor do you have to be a licensed ProLaw user to import data using the Document Import utility. If your office uses ProLaw ProFiling, opening the Document Import Utility will open ProLaw automatically.

3. When you import any Documents into ProLaw using this utility, you have a choice to either *copy* the documents into ProLaw and leave the originals in the folder where they were or to *move* them into ProLaw which will delete them from the source location.

4. Once a copy has been made and imported, any changes to the original work will not appear in ProLaw. There is no link from ProLaw to the imported documents.

5. **The settings you choose will apply to all document imported in that group.** Once the Import is complete, you will need to clear the Selected Documents in order to being a new import.
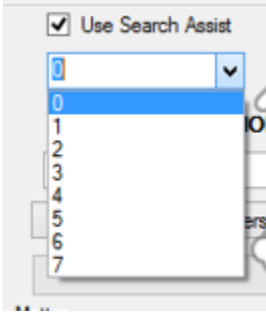
IMPORTING DOCUMENTS
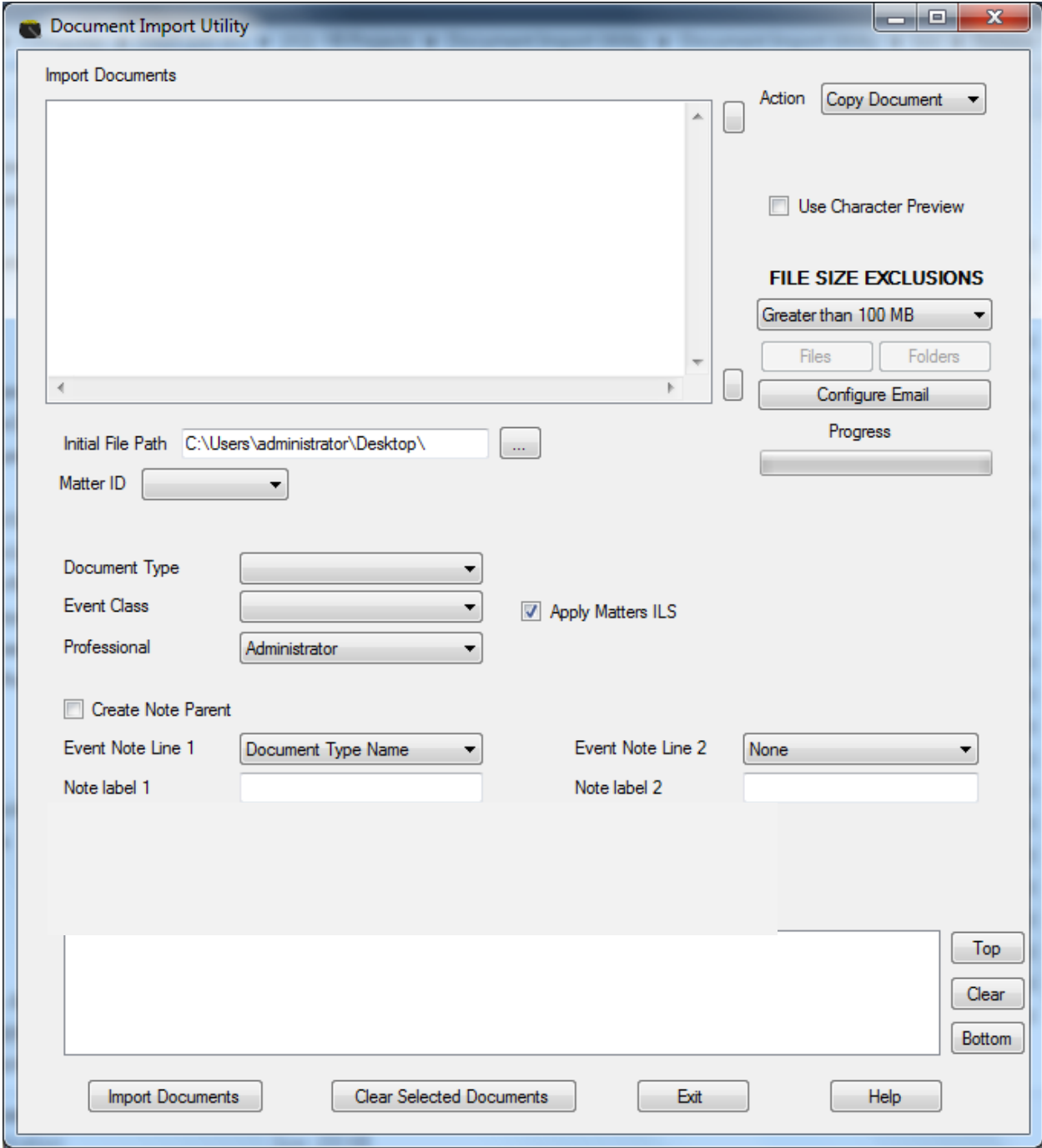
- *Import Status:* This frame will display the status of the documents as they are imported.
- *Action:* This field has a drop-down list that lets you choose whether you want to *Copy Document*s or *Move Document*s into a Matter in ProLaw. Select which method you wish to use.

Use Search Assist: This checkbox determines whether you want to enter the Matter ID where the documents will be imported to by typing directly in the *Matter ID* field or have additional fields show to selecting the Matter.

- o *Checking the Use Search Assist Box*
  As you can see below, by checking the *Use Search Assist* box and typing the start of the Matter ID*, a pop-up window appears (see bottom of illustration) with a list of all Matters that match what you have typed. As you type more, the Matter list grows smaller. You could also scroll through this list to find the Matter you want.
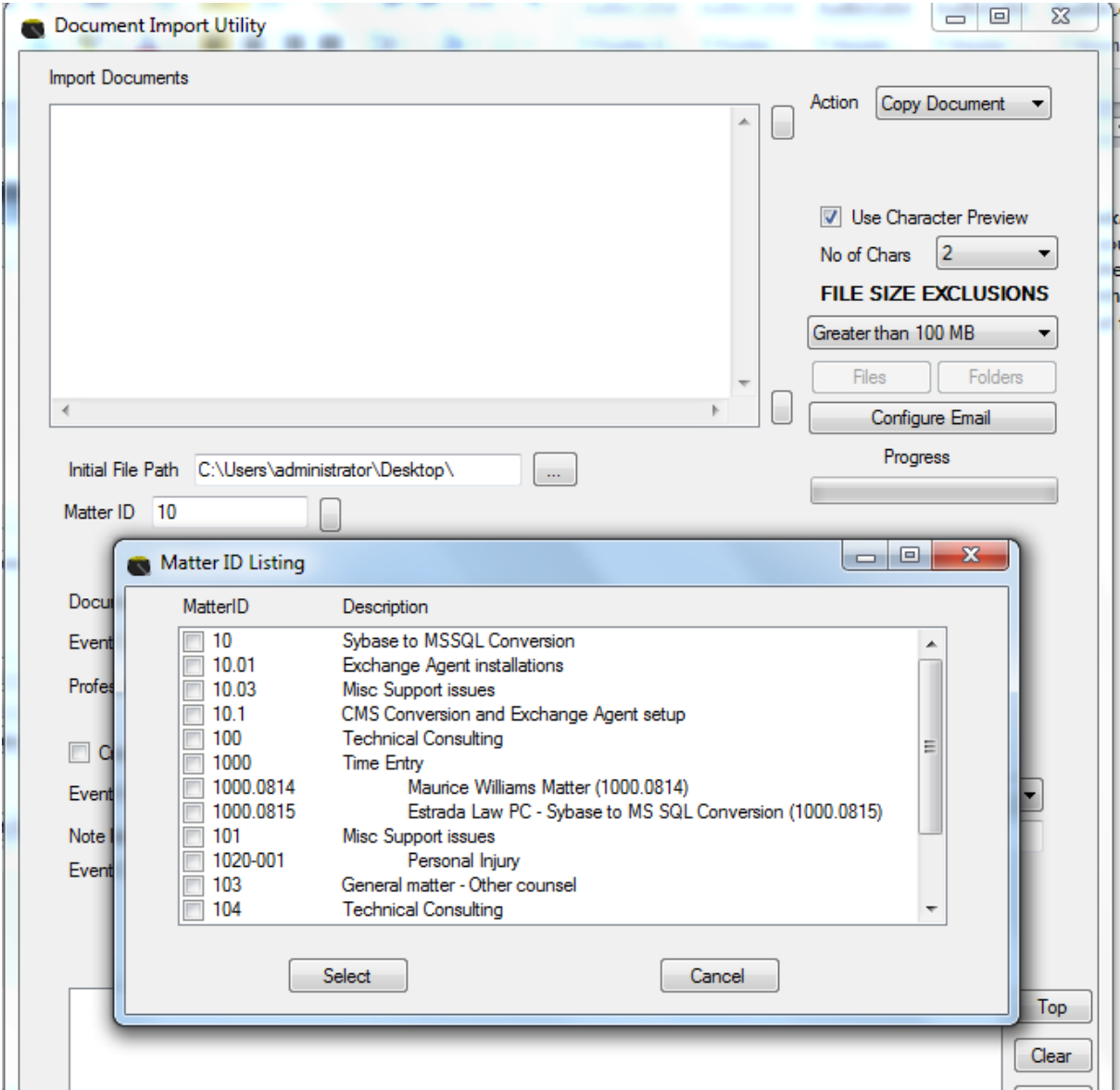
- o The drop-down box below the *Use Search Assist* checkbox allows you to select how many characters you will type before the assist will kick in and your pop-up window appers.

- o *Unchecking Use Search Assist Checkbox*
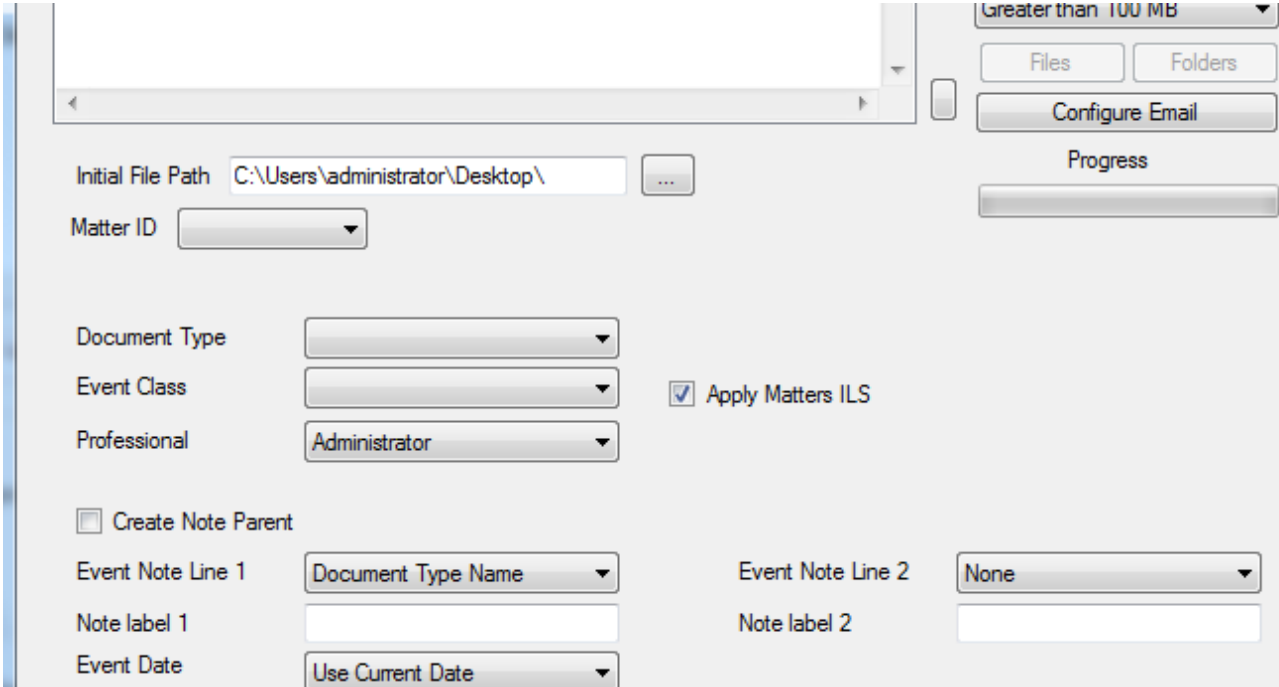
Unchecking this box adds results in the Document Import Utility displaying drop-down lists for the Document Type selection and MatterID selection.. Clicking the down-arrow provides a list of all Matter IDs in ProLaw where you can import documents to.

NOTE: Only the Matter ID shows in the drop-down. There is no Matter Description on this list. If you wish to search by Matter Description, you can do so by to read altering the system preferences key `<add key="MatterSearchBy" value="matterid"/>` to read

- o `<add key="MatterSearchBy" value="description"/>.`

o   2- The second field is to the right of the *Document Type* field. It shows as green in this illustration. This provides a list of all of the Available Document Types in Prolaw. Selecting from this list will automatically fill the *Document Type* field. *With Use Search Assist unchecked, the Document Type* field will show a pop-up window of matches as you type.
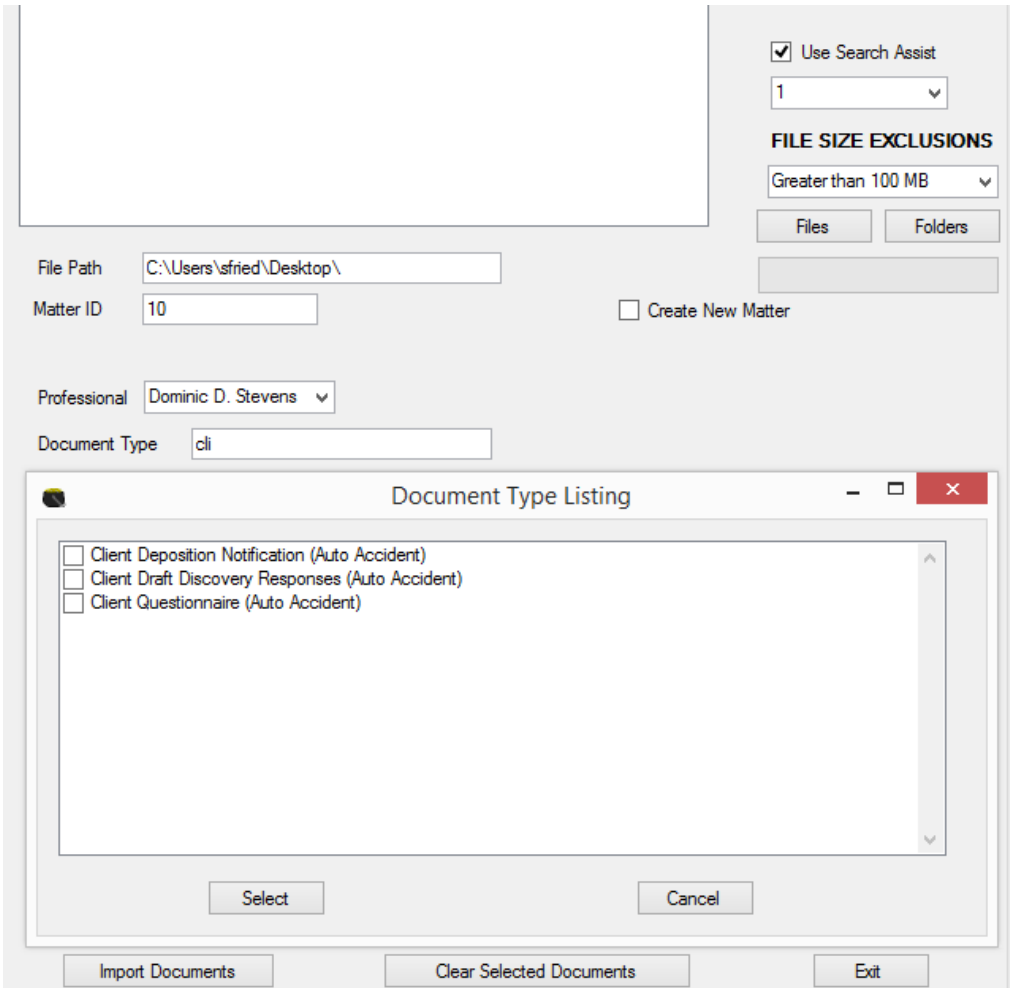
- o *Use Search Assistant Drop Down List:* This box tells the system how many characters you need to type into the MatterID field or the Document Type field before a help screen pops up (Search Assistant must be checked).

- o *File Size Exclusions:* This drop-down list allows you to exclude from the Import any documents that are over a designated file size. One can also choose *Unlimited* to import ALL documents in a file. The File Sizes that can be excluded are:
  - Greater than 5 MB
  - Greater than 10 MB
  - Greater than 25 MB
  - Greater than 50 MB
  - Greater than 100 MB
  - Unlimited

- o *Initial File Path:* This field will default to the file path for the workstation one is working on. Using common terms like My Computer or Desktop also work.
- o *Files Button:* Clicking on the button will open a Document Import Browser window that allows you to navigate to a single file or a group of highlighted files.
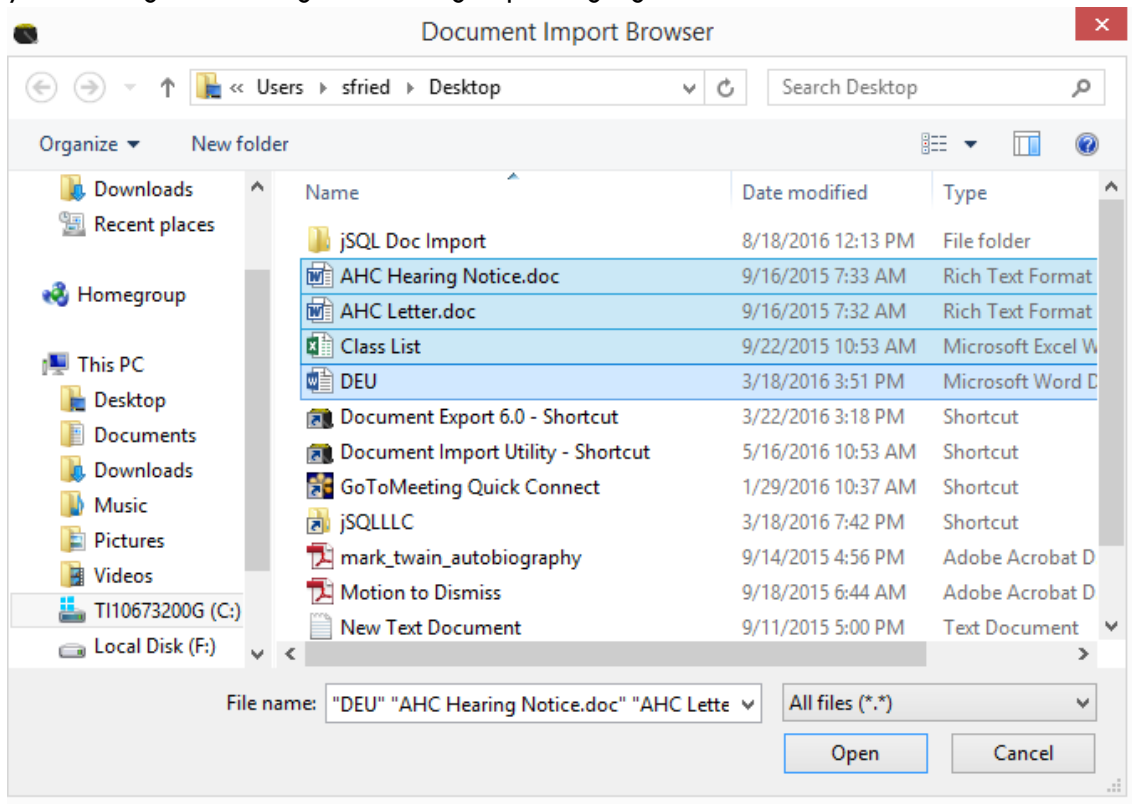

Use the *Open* button at the bottom of the Browser window once you have selected the files to import. You can also manually select a series of files directly from a file folder or your desktop and drag them into the Import Documents box. It works with folders also.

o   The results of your selected files will show on the *Import Status* window to show confirmation of which files you have selected.
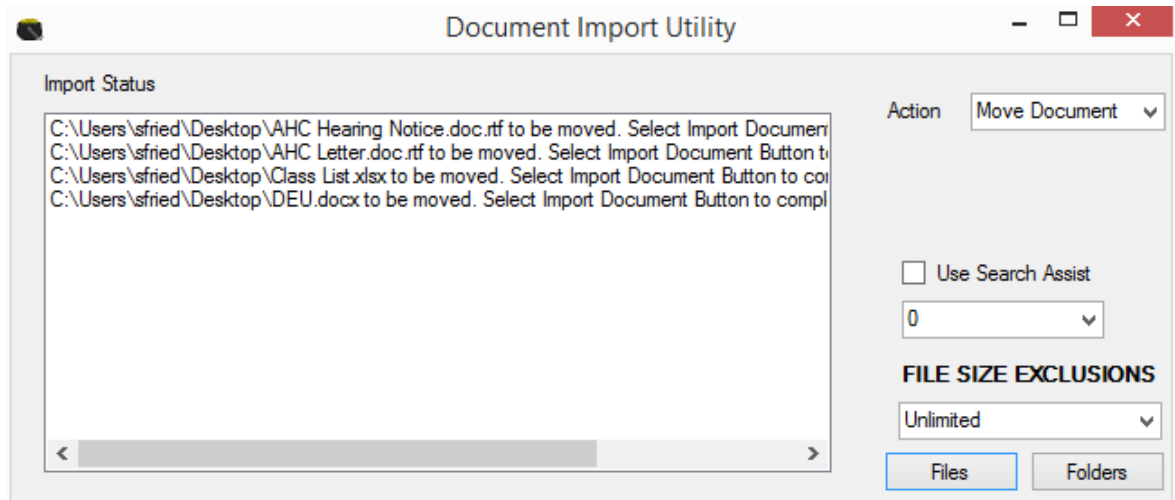
o   *Folders Button*: Clicking the *Folders* button bring us a *Browse for Folder* window that allows you to browse from your workstation to a folder where you want to bring all of the documents in that folder into ProLaw. You can also drag and drop folders into the Import Documents box.
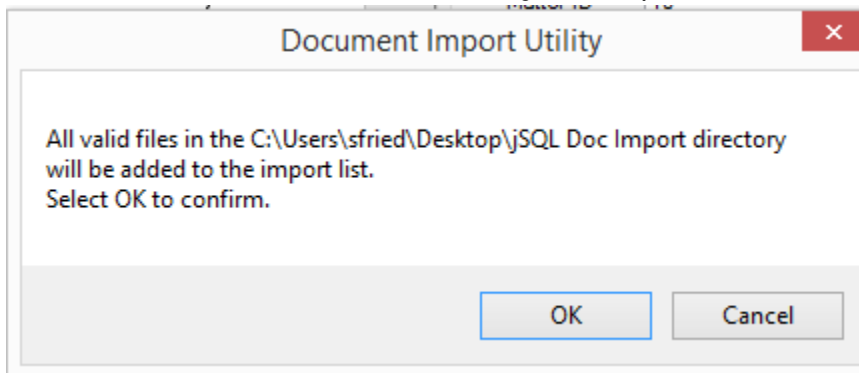
o   When you click *OK,* all of the documents in that folder will be listed in the *Import Status* window like this:
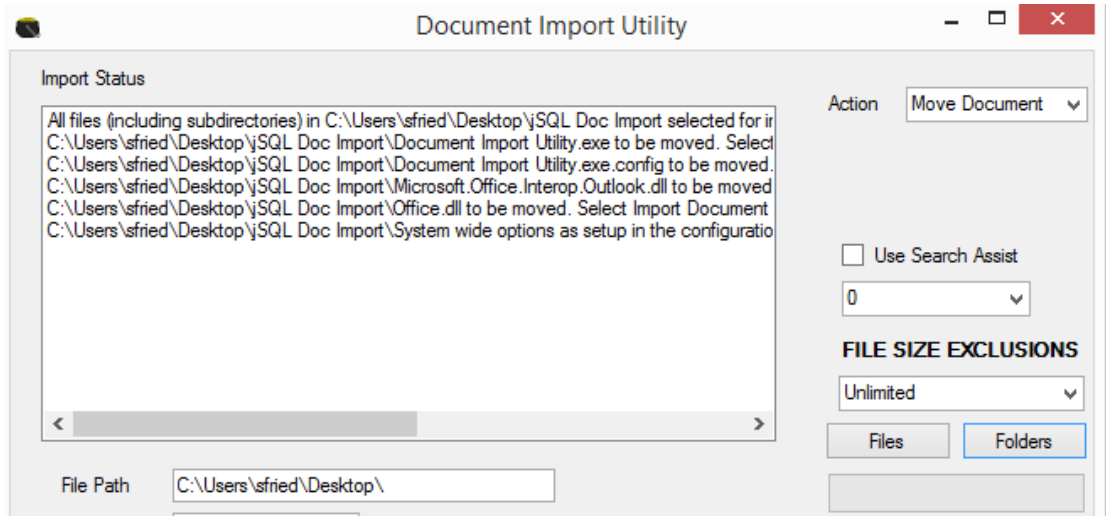
NOTE: Selecting the Control key and the D key while highlighting an item in the Import Status screen will remove it from the list of documents to be imported.

o   Apply Matters ILS: Checking this box will result in the documents being assigned to the same Item Level Security group that the matter is assigned to.
o   Match Dir to Event Class: Selecting this option will make the application scan the path of the documents to be searched for a complete directory name that matches – exactly, the name of an Event Class within ProLaw. If an alternate Event Class is found, it will be used instead of the default Event Class.
o   Dir Name Contacts Event Class: This preference is an extension of the above Match Dir to Event Class. The basic difference is that in this case, the full ProLaw Event Class is contained within the directory name, but may not be the complete directory name.
o   Match Dir to MatterID: Selecting this option will make the application scan the path of the documents to be searched for a complete directory name that matches – exactly, a MatterID within ProLaw. If an alternate MatterID is found, it will be used instead of the default MatterID.
o   Dir Name Contains MatterID: This preference is an extension of the above Match Dir to MatterID. The basic difference is that in this case, the full ProLaw MatterID is contained within the directory name, but may not be the complete directory name.
o   Configure Email: When enabled, allows you to drag and drop items from Microsoft Outlook into the Import Document screen. Preferences for the Email Configuration are further detailed at the end of this document.

o   *Progress Bar:* There is a progress bar below the *Files* and *Folders* buttons. This will show you the progress being made during the import so you can track how fast your import is going.

o   *Create New Matter Checkbox:* With this checkbox checked (when enabled), field will show where you can enter the Matter Description for the New Matter you want to import into. At the time you import, a New Matter will pop up from ProLaw with the Matter Description field filled in to confirm this is the Matter you want to create. You can then finish creating the Matter in ProLaw from there adding Client, Area of Law, Type, and Professionals.

- o *Professional*: This field will default to the User. There is a drop-down list of all active Professionals in ProLaw from which you can select which Professional you want to assign the imported documents to.

- o *Document Type*: This is explained above on Page 7.
  NOTE: Using the Search Assist checkbox allows you to start typing in this field and get a pop-up of Document Types matching your entries. Not having the Search Assist checkbox checked gives you a field with a drop-down menu of all available Document Types in ProLaw from which you can select to populate the Document Type field. This is a user setting that can be turned on an off according to preference.

- o *Event Class*: If the *Document Type* selected has an *Event Class* associated with it, it will auto-populate once the *Document Type* is entered. One can override that default *Event Class* using the drop-down list in this field if needed.

- o *Create Note Parent: This checkbox allows you to create a ProLaw Note and place all the import documents as children to that note. This is beneficial when performing very large imports and you want to have a way to organize data within a matter to be cleans up further later. You have the option of selecting the Note Type and fill in the syntax of the Note.*

- o *Event Note Line 1*: You can select how you want the Notes Field to default on all of the documents you have selected to Import. *Default Note Line 1* will be the first line in the Notes field for the Document. This is the line that will show in the Events Tree in a Matter. You can choose *File Name with Path* which would show you the original file path and File Name (the

Original Document Name), *File name without path* which only shows the original filename. This may be the most common import for the first line. You could also show the *Document Type Name* here if that is preferable although you may have a number of the same Document Types so these could be redundant. Lastly, you can customize the Note Field Using the *Custom Note Line 1* field. Also note that the label for this field can be customized by editing the system configuration file.

- o *Event Note Line 2* is the same drop-down menu to select what you want to default on the second line of the Document Notes field.

  NOTE: A customary use may be to select *Filename without path* as the first line so one can search for the document based on the original filename. This would have no Custom Note Line 1 filled in. One could then select under *Default Note Line 2* to default to what has been entered on *Custom Note Line 2*.

- o *Event Date*: This field allows you to determine what date you want showing on the Events Tree in the ProLaw Matter. *Use File Creation Date* is the date the document was created. *Use Last Modified Date* is the last date someone worked on the document. *Use Current Date* shows the date the document was imported into ProLaw. All three dates will show on the Document Tracking Tab. The date selected here is what will show in the Events Tree and for document searches in the Events Module.

- o *Tracking Field*: The large field at the bottom of the window will provide a list of updates to the program and changes to the setup. This is used for troubleshooting if needed. There are no settings here for the user. If the User makes errors in their setup for the import, it will show in the window after the *Import Documents* button is clicked. Any field that needs to be filled in will have the name of the field show in red. Below, we see the Matter ID field is listed as needing a valid Matter ID. The Matter ID field name itself is now in red.

- o *Import Documents Button*: This button activates the import. If something has not been entered correctly in the setup, you will find a prompt in the field just above *Import Documents*.

- o *Apply Matters ILS:* Selecting this checkbox allows you to apply the current security settings established for the Matter to all documents that are imported into the Matter.

    ☑ Apply Matters ILS

- o *Clear Selected Documents*: Once your import is compete, you will need to use this button to clear all of the documents you selected to import so you can import another set of documents. This is a safeguard from accidentally leaving one or more documents to be imported and having them import again.

o *Exit*: Closes the Document Import Utility.
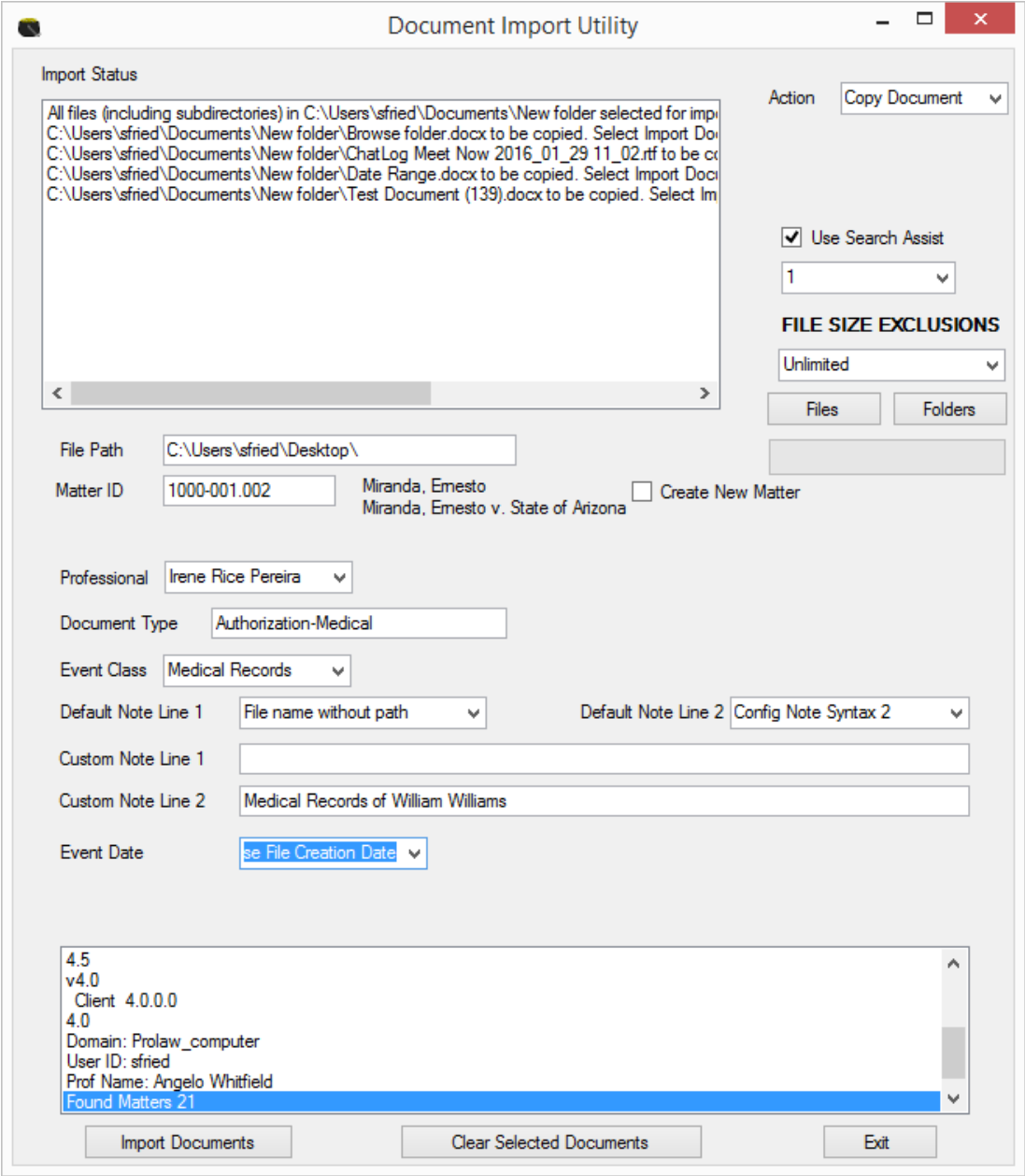
- The Document Import Utility can be globally configured to search for a Matter to import documents to by search for the Matter ID, Matter Description or the Client Sort.

Email Configuration: Even if you have setup the system preferences to allow the Document Import Utility to work with Outlook, you still need to configure it to know how you want the email items and attachments to be profiled. If you do not configure it via the Configure Email button, you cannot drag and drop out of Outlook. When you select the Configure Email, you will be presented with a new menu of options.

The Email options apply to just emails that are dragged into the Import Utility from Outlook. It does not apply to any .MSG files or .XML files you may have in file folders. Like regular documents you must configure the Document Type used for importing email, an event class, at least the first line of the event note and the date to use when creating the entry into ProLaw. In addition, you have the ability to create a ProLaw Note that contains the syntax of the original email body.

Additionally, you can have the import utility scan the subject line for a MatterID. If you select this feature and a MatterID is found in the Subject line, the email will be imported into Prolaw under that Matter. Otherwise, it will be imported into the default Matter setup on the prior screen.

In a release forthcoming, you will be able to select to Create Separate Documents from Email Attachments. These items will be imported as children to the Email. You can select what Document Type, Event Class, Event Date and custom Note syntax to use as well. When you have your Email Configuration complete, select Save – this will return you to the main Document Import Utility screen.

Coming Soon: In a release in the near future you will be able to scan the source document path for documents (not emails from Outlook) for the Event Class and MatterID. The items will have to be the entire directory name, meaning \\SERVER\1001-001\.... Works fine to identify MatterId 1001-001, but \\SERVER\1001-001 Smith v Jones\.... will not work because the directory name is comprised of additional data besides the MatterID. Also note, selecting these options will disable some other preferences.

You are now ready to import!