DOCUMENT EXPORT UTILITY USER GUIDE

iSQL LLC	User Guide

A Tool to Export Documents, Docket Events, and Notes
From ProLaw

DOCUMENT EXPORT UTILITY USER GUIDE

WORKING WITH THE DOCUMENT EXPORT UTILITY

This program allows you to export copies of Documents or Docket Events and Notes from within ProLaw to be used outside of ProLaw. Once these events are exported they are no longer linked to the document management, calendaring, or notes functions of ProLaw. Any changes made to the exported copies after they have left ProLaw are no longer captured in ProLaw. Any changes made to events within ProLaw after copies are exported will not show on the exported copies.

This is an excellent way to bring these events out of ProLaw to put on a computer, detachable hard drive, or flash drive so they can be brought to court, depositions, mediations, and other times when it is beneficial to take copies of Documents or Docket Events and Notes for reference. This utility can also be used for exporting Documents, Docket Events and Notes for archiving outside of ProLaw. In this case, once the events have been exported and verified, the originals can be deleted from ProLaw.

At times when an Attorney leaves a firm and takes clients with them by agreement, Documents, Docket Events, Notes, Matter information, and Related Contacts can be easily exported using a number of different methods. Only a copy is exported so the firm can maintain a full record of work done on these Matters up until the Attorney's departure.

There are many different uses for the Document Export Utilities. Your office will determine when it is best to use and what protocols to follow. This manual is designed to show how to use the Utility.

Contents

METHODOLOGY

To export Documents and/or Docket Events and Notes from ProLaw, select the Matter or Professional whose work is to be exported. There are a number of parameters which can be selected to narrow down work by Event Class, Date Range, Pleading Index, Area of Law, and/or Matter Status. Once all parameters are in place, determine where the work is to be exported (a folder on a shared drive, the workstation's C:\ drive, or a removable drive. Click on the OK button and the work will be copied and exported. The Application Feedback window will let you see what the status is of the export. Once the export is complete, close the Document Export Utility or select another set of parameters to export more work.

Unless you are exporting data using the *All Client Matters* checkbox or exporting by Professional, you will not be able to export from more than one Matter at a time.

Steps

1) Select Export by Matter or by Professional
2) Select the parameters to be used for the export
   - This will determine what will be included in the export
3) Select the drive and folder where the export will go
4) Export

Exporting Docket Events and Notes, Matter Details, and Related Contacts

When selecting the checkboxes to export Docket Events and Notes, Matter Details, or Related Contacts, the Document Export Utility will create pipe delimited (|) text files that will show in the same folders as the exported documents or, if not exporting documents, in their own folder. These files can be used to import data by SQL script into other databases. They can be imported by Excel or Outlook for working with the information in those programs. Your IT staff will be the ones who will use these files.

How to Use Document Export Utility

1. Open Document Export Utility by double clicking the desktop Icon with your left mouse button:

2. You do not need to have ProLaw open to use Document Export Utility but it can be useful to use if you need to search for Matter IDs and other information direct the export.

    NOTE: *If your office uses ProLaw ProFiling, opening the Document Export Utility will open ProLaw automatically.*

3. When you export any Documents or other data from ProLaw using this utility, the information is c*opied* from ProLaw leaving the original Documents, Docket, Notes, Matters, or Contact data within ProLaw.

4. Once a copy has been made and exported, any changes to the exported work *will not appear* in ProLaw. There is no link from ProLaw to the exported documents or other exported data.

5. There are tabs at the top of the Document Export Utility window that allow you to access the various ways to export Documents and Docket/Notes information from ProLaw to be used elsewhere.

6. You may export Documents, Docket Events and Notes by Matter OR by Professional.

7. Exporting by Matter allows you to select a single Matter or designate a group of Matters.

8. Exporting by Professional allows you to select a Professional in ProLaw and export for a number of Matters the Professional is assigned to.

9. Documents will be exported with the Windows Filename of the First Line of the Notes Field in ProLaw rather than the ProLaw Document Number.

10. As you check various boxes on the tabs of the Document Export Utility, menus will appear to allow you to follow through on the tasks you have selected.

EXPORTING DOCUMENTS BY MATTER

By Matter Tab Fields
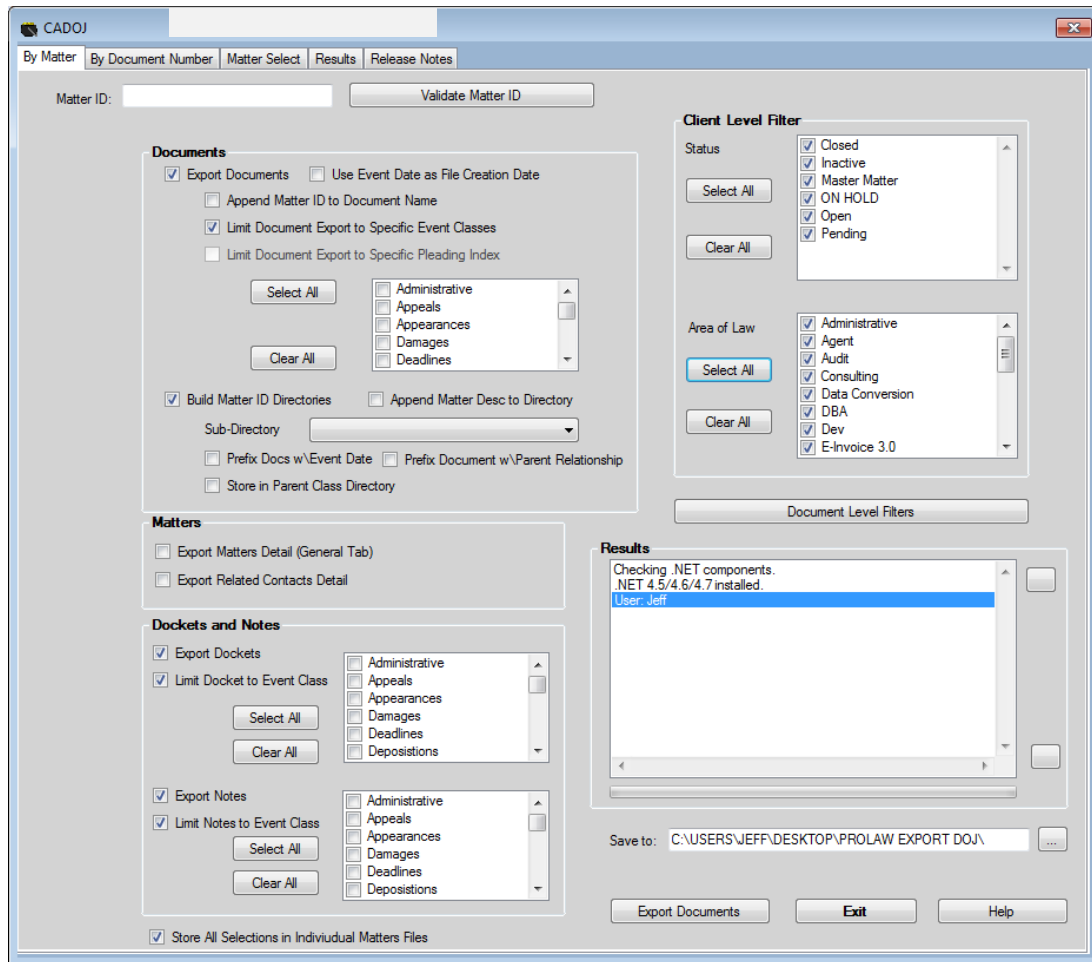
- *Matter ID*: Enter one or more Matter ID to be used for the export. If you need to export the data for *all* matters in ProLaw, type ALL MATTERS in this field. This can be useful in case of a firm merger or changing to a different program for document management.
- *All Client Matters*: Use this checkbox to select all the Matters that have a shared Client ID. With this checkbox checked, enter the Client ID portion of the Matter ID and all matters that begin with that Client ID will be included in the export. *Example: Type 1250 to export Documents, Docket Events or Notes for every Matter that starts with 1250. If your Matter IDs are prefaced with a year, you will be able to export only one year at a time. Enter the year and Client ID as formatted in your MatterID.*
- If selecting more than one Matter ID, use a space between each Matter ID. The Document Export Utility will read that you have selected multiple Matters by Matter ID and the text on the *Validate Matter ID* button will change to read *Multi-Select mode*.

- *NOTE: If exporting by Matter ID, there is no need to use the additional filters noted in the section below.*

- *Client Level Filtering*
  How to limit the Matters to export from when *All Client Matters* is selected.
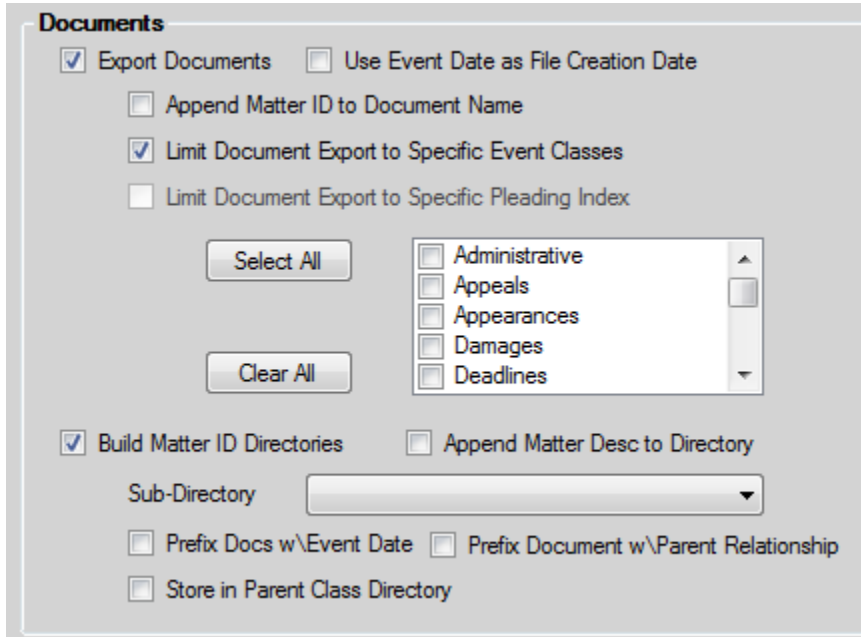
  - o *Limit by Matter Status:* Use this checkbox to reveal the list of Matter Status Types you have within ProLaw that show on the Matter General Tab. You can check the Status for which Matters you want to use for exporting in this window. For example, you can select *Open* to only select from Matters currently open that match any other criteria determined below. This would exclude any Matters with the status of *Closed* or any other status. You may select any number of Matter Statuses that are needed by checking those.
  - o *Limit to AOL:* This checkbox will open a window showing the list of all Areas of Law in ProLaw. You may use this list to limit the export only to Matters in one or more particular Area of Law (AOL). The operation is the same as limiting by Matter Status.
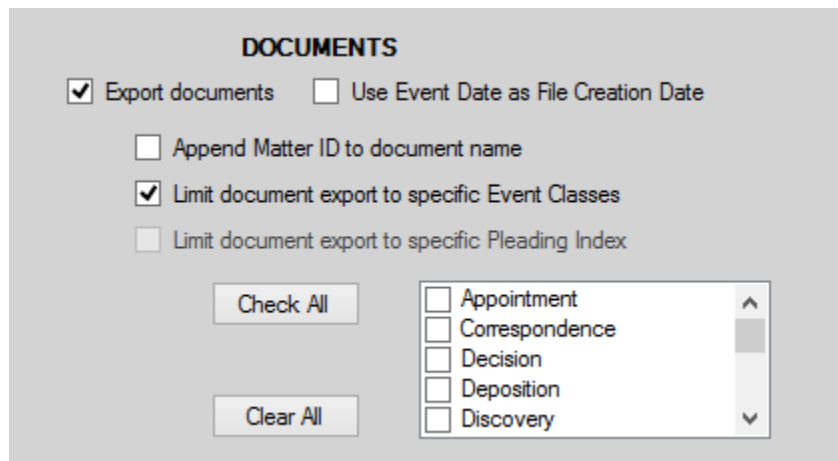
NOTE: Matter Level Filtering is only of use when selecting *All Client Matters*. This allows one to select any grouping of Matters for a Client such as: Matter for that Client which are Open with the Area of Law of Litigation. When selecting a single Matter by Matter ID, there is no need to add limits to it.

- *DOCUMENTS*

  NOTE: The Filename of the document when exported will be the first line in the Notes field for the document in ProLaw Events (or what displays on the Events Tree on the Events Tab in a Matter).

  - o *Export Documents*: Use this checkbox if you wish to export documents from the Matters as identified by Matter ID or Client ID. Clicking this checkbox gives you additional fields to use for filtering which documents are to be exported.
  - o *Use Event Date as File Creation Date*: This will use the Event Date for the document in ProLaw as the date the file was created in the directory where the documents are exported. With this box unchecked, the document date in the directory will be the date of the export.
  - o *Append Matter ID to Document Name*: Checking this box will add the Matter ID from ProLaw to the name of the document that is exported.
  - o *Limit Documents to Event Class*: Checking this box provides you with a list of the available Event Classes in ProLaw. You may select one or more Event Classes. You may select *All* by using the *Check All* button. Selecting *All* will export all of the documents that are assigned to the selected Event Class(es). Any documents with no Event Class assigned will not be exported. The *Clear All* button will clear your selections so you may start over should you want.

Limit Documents to Pleading Index: Checking this box will bring up a list of all Pleading Index Types in ProLaw. You may select one or more Pleading Indices or Select ALL by using the *Check All* button. Any document not assigned to a Pleading Index will not be exported. The *Clear All* button will clear your selections so you may start over should you want.

NOTE: *One may limit the documents either by Event Class OR Pleading Index but not both.*

- o *Build Matter ID Directories*: Using this checkbox will create a subdirectory for each Matter where the documents will be exported in the *Save To* field. This can be useful when you are exporting documents from multiple Matters. Without this checked, all documents would be in a single directory when exported.
- o *Append Matter Desc to Directory*: With this box checked, the Matter Description field from ProLaw will be added to the Matter ID on the directory name where the documents will be exported.
- o *Sub-directory*: This drop-down list allows you to create one sub-directory within the Matter ID directory based on the following fields in ProLaw:
   - ▪ *Event Class*
   - ▪ *Event Type*
   - ▪ *Adding Professionals (initials)*
   - ▪ *Pleading Index*

Only one Sub-Directory may be created for each export. If you need to export to multiple sub-directories, these should each be done as separate exports. This will prevent accidentally exporting documents to the wrong directory.

NOTE: To use the *Sub-directory* feature, *Build Matter ID Directories* must be selected.

- *MATTERS*

  - *Export Matters Detail*: Using this checkbox will create a pipe-delimited text file which is added to the export directory. This will have details of the Matter which can be imported by SQL or can be opened in Excel.
  - *Export Related Contacts Detail*: Using this checkbox creates a pipe-delimited text file which is added to the export directory. This will have details of the Contacts in ProLaw related to the Matter. The file can be imported by SQL or can be opened in Excel.

- *DOCUMENT LEVEL FILTERS*

  - Select the Document Level Filters button to be able to select certain data conditional limits on your results sets. You can search the Document Notes field for the existence or non-existences of you to two different character strings. You also have the ability to set a date range limit of the documents. The date range uses the creation date of the document as specified in the Event Tracking tab for the documents.

  Select Save to preserve the settings, Clear to deactivate the filter and Exit to close the Document Filter Window.

- *DOCKETS - NOTES*
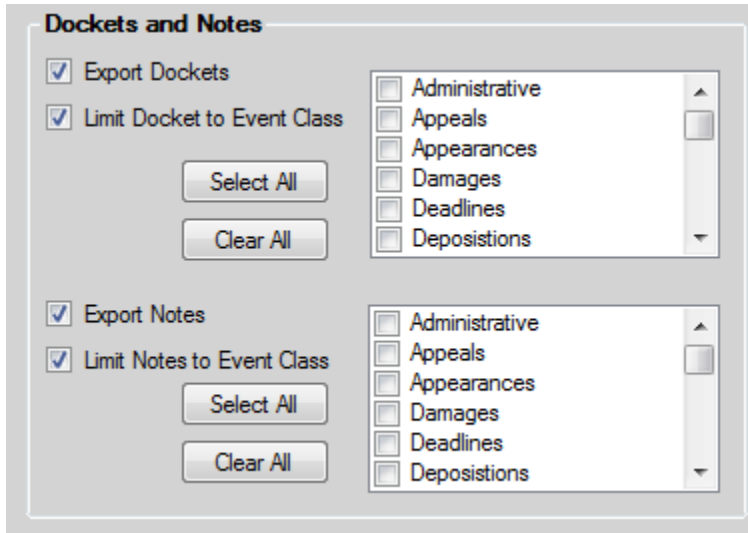
- o *Export Docket:* This checkbox allows Docket Events and Note Type from the selected Matters to be exported in tab-delimited text files.
  - o *Limit Docket to Event Class:* This checkbox allows only Docket Events of a particular Event Class to be exported.
  - o *Export Notes:* There is an additional section below *Export Docket* to allow Notes to be exported from the selected Matters.
  - o *Limit Notes to Event Class:* This checkbox allows only Note Types of a particular Event Class to be exported.
- *Save To:* This field shows the directory selected to export to. There is a search button to the right of the field that will open a window to search for and select a specific drive and directory on that where the Document, Docket Events, and/or Notes will be exported..
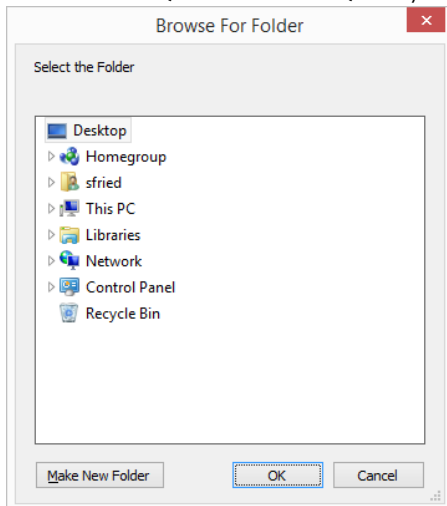
You may export to drives on your computer, shared network drives, flash drives, or external hard drives. The *Save To* field will display the selected drive and directory.
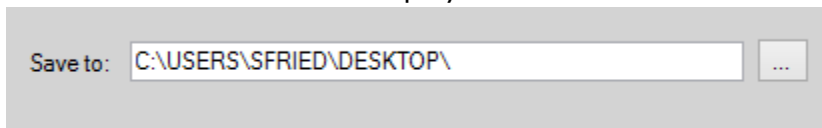
- *Results*: This window will display the results of your Export. Any errors will show here. If successful, you will receive a *Process Complete* note.

EXPORTING DOCUMENTS BY PROFESSIONAL

By Professional Tab Fields

- *Professional*: Select from the dropdown list from Professionals in ProLaw to specify the Professional whose documents and docket events are to be exported.

- *Active Professionals Only*: Use this checkbox to limit the list of Professionals available to only those who are listed as Active in ProLaw.

NOTE: The Professional must be assigned to both the Document and/or Docket Event as well as be an Assigned Professional on the General Tab of the Matter for the export to be successful. If the Professional is not both on the General Tab and the Event, the Document or Docket and Notes will not export.

- *Export Filter*
  - *Active Matters Only*: This checkbox allows you to limit the export by Professional to Matters that are Active (not Closed or Pending).
  - *Limit to Assigned Type*: This checkbox allows you to limit the documents and docket events for a particular Professional when they have a specific Assigned Type on the Matters' General Tab (e.g., Responsible). Leave this box unchecked if you need to export work for all the Matters for a Professional regardless of their Assigned Type on the General Tab. Checking the box brings up a list of Assigned Types available in ProLaw. You can select one or more Assigned Types for the selected Professional.

  - *Date Range*: Use this checkbox if you want to export Documents and Docket Events for a Professional within a specified date range.

  - *Date Type*: Use this dropdown list to select which Date field in ProLaw will be used to establish a *Date Range*. The options are:
    - *Date Matter Created*
    - *Date Matter Opened*
    - *Matter Status Date*
    - *Docket Date/Document Date:* The Event Date in ProLaw for the Document, Docket Event, or Note being exported. Example: The Date a Docket Event is scheduled to take place.
    - *Date Document/Docket Created:* The Date the Event was created in ProLaw. Example: Not the date a Docket Event is scheduled to take place but when it was entered into ProLaw

  - *Start Date/End Date*: This is the start and end date for the date range of the date field selected in *Date Type*. The search buttons to the right of the fields will bring up a calendar .

  - *Limit to AOL*: Use this checkbox to limit the export only to Matters for the Profession selected that are of one or more Areas of Law. Not checking this box will bring up all the Matters for

the Professional. Clicking on the box will bring up a list of the Areas of Law in your configuration of ProLaw. Use the checkbox next to the AOL to select it. The *Check All* button will select all AOLs. *Clear All* will unselect all of them.
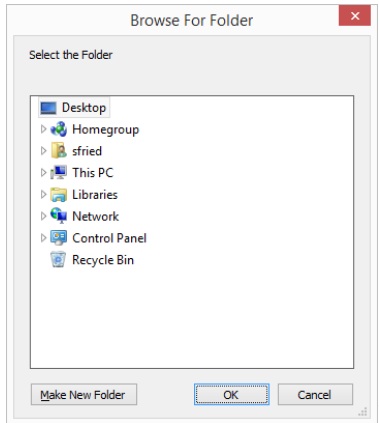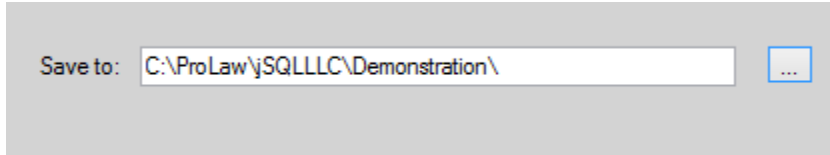

- *DOCUMENTS*

   o *Export Documents*: Click on the checkbox if you want to export documents. If documents are not to be included in the export, leave this unchecked.
   o *Build Matter ID Directories*: This checkbox will create a subdirectory for each Matter where the exported Documents will be copied. The subdirectories will be in the directory specified in the *Save To* field.
   o *Create as PDF*: Checking this box will export a PDF of the documents rather than in their native format. This is of particular use if exporting documents to be used in court or other proceeding where it is best that a document not be able to be changed. This functionality is currently available only on the *By Professionals* tab.

   NOTE: If you need to export documents in PDF format, use the filtering functions of Matter Date Opened and Area of Law to limit the results. Be sure to create Matter ID Subdirectories to ensure you have the documents for the correct Matter.

- *DOCKET*

   o *Export Docket*: Click on this checkbox to include both Docket Events and Note Type in the export.
   o *Exclude Completed Dockets*: When this checkbox is checked, the export will *not* include any Docket Events marked *Done* in ProLaw. It will only export uncompleted Docket Events.
   o *Use Filter*: Checking this checkbox will apply the same criteria set for Documents under *Export Filter* to Docket Events and Notes as well.
- *Save To*: This field is where the path will show the directory that has been selected to export to. There is a search button to the right of the field that will open a window to search for and select a specific drive and directory on that drive to be used for the export. You may export to drives on

your computer, shared network drives, flash drives, or external hard drives. The *Save To* field will display the selected drive and directory.

- *OK*: Click the *OK Button* to run the export.
- *CANCEL*: The *CANCEL Button* will cancel the export process.
- *Go to the BY MATTER TAB* to see the result of the export on the *Application Feedback* window.

EXPORTING DOCUMENTS BY DOCUMENT NUMBER

By Document Number Tab
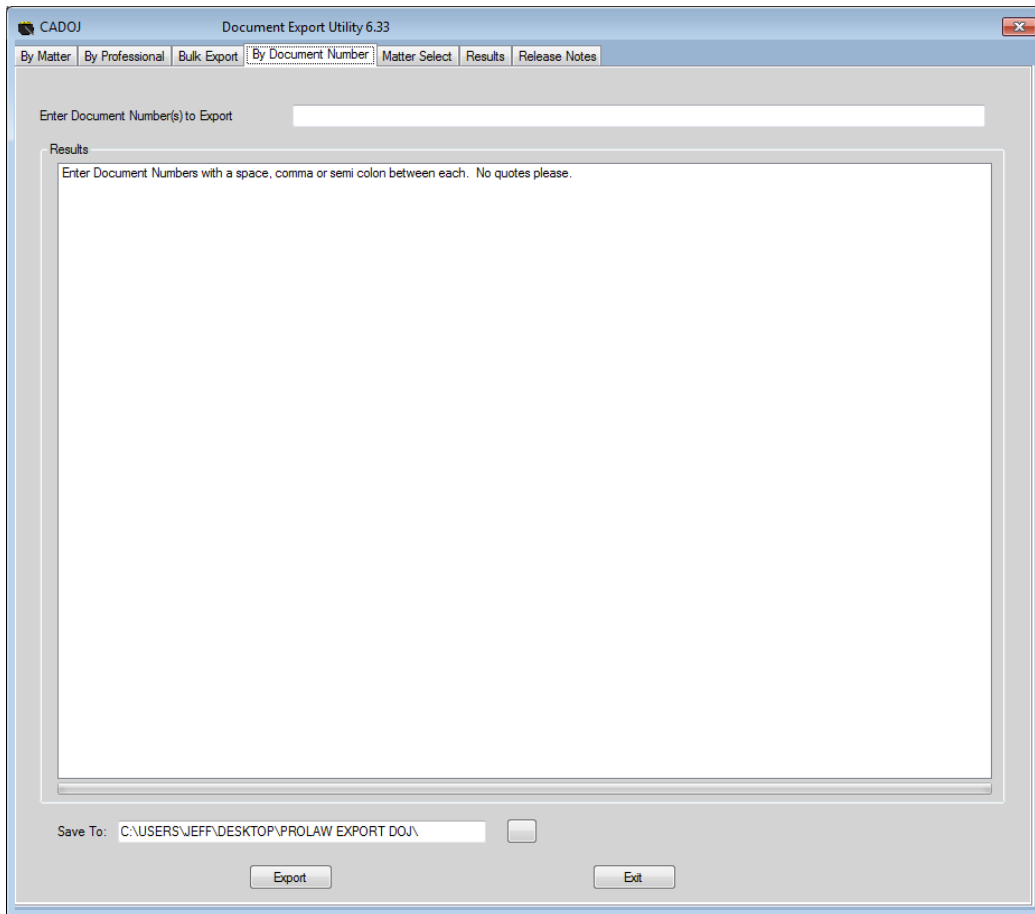
- Export one or more specific documents at a time by Document Number using the *By Document Number* Tab..
- Enter the Document Number in the field at the top of the Tab.
- To export multiple documents at a time, enter with a SPACE between each document number. Documents do not need to be in the same Matter or by a single Professional.
- You will need a list of Document Numbers to use for export. You cannot look up documents from within the Document Export Utility. It is best to search for these within ProLaw using the Document Tab in the Events Module.

- The *Save To* field allows you to designate where you want to save the exported documents. The button to the right of that field opens a window to allow you to select the drive and folder to save to just as it does with the other tabs.
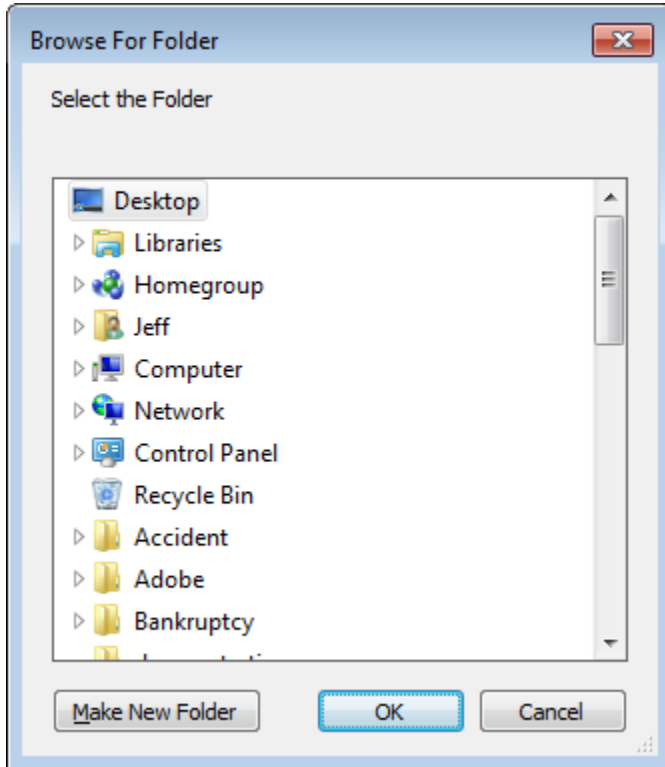
- Once you have entered the Document Numbers(s), use the EXPORT button at the bottom of the tab to initiate the export. A green bar below the window will show you the progress of the export.
- The window will confirm which documents are exported and when the export is complete.

# EXPORTING DOCUMENTS USING MATTER SELECT

By Matter Select Tab
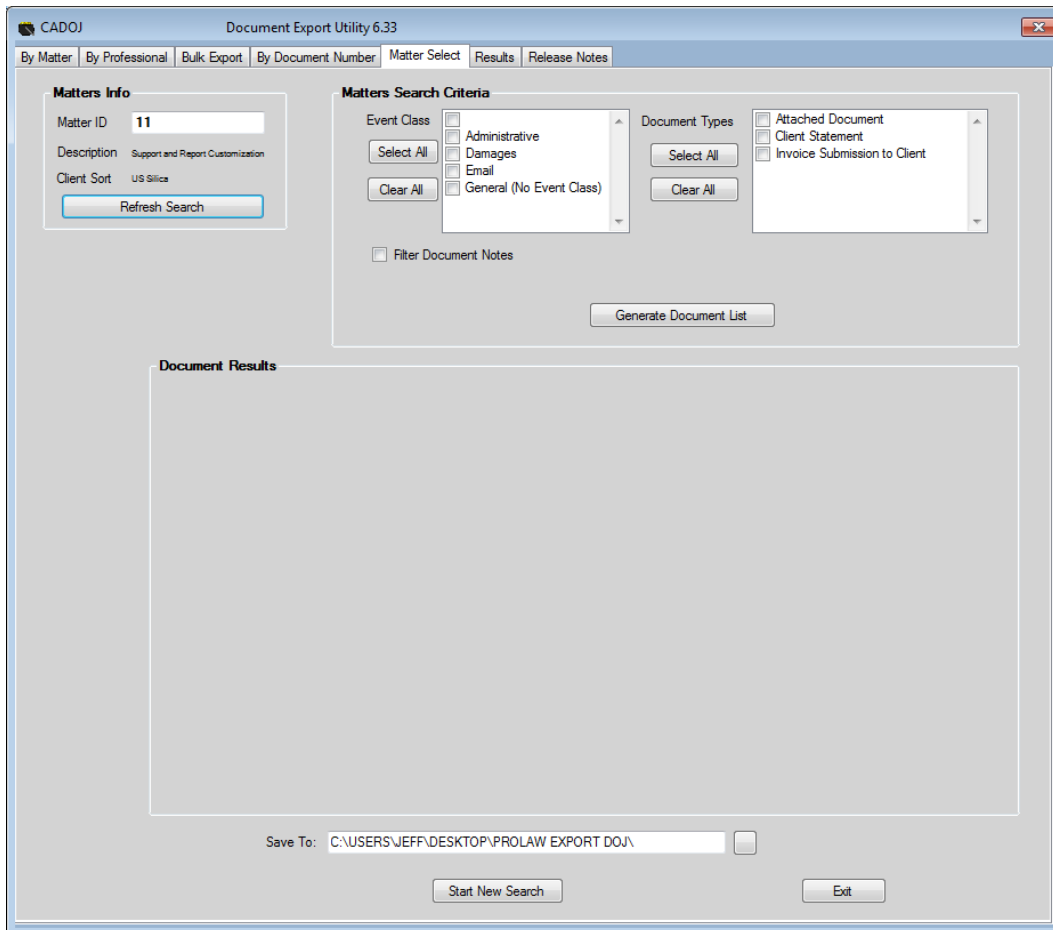
- The *Matter Select Tab* provides detailed control over which documents in a specific Matter are to be exported.
- Enter the Matter ID in the *Matter ID Field*.
- Use the *Start Search Button* to begin searching for which documents in the Matter are to be exported. Additional windows open upon clicking *Start Search*.
- The *Event Class* window allows you to select one or more Event Classes in ProLaw to use for selecting which specific documents will be exported from the selected Matter.
- The *Document Types* window allows you to select one or more Documents Types in ProLaw to use for selection which specific documents will be exported from the selected Matter.
- Both windows have a *Check All* and a *Clear All* button to the left of the window to facilitate use when these are appropriate.
- One can select any combination of *Event Class* and/or *Document Type.*

- Filter Document Notes allows you to include searching the document notes field for certain syntax along with your Document Type and Event Class Filters. You can also exclude certain syntax if desired.
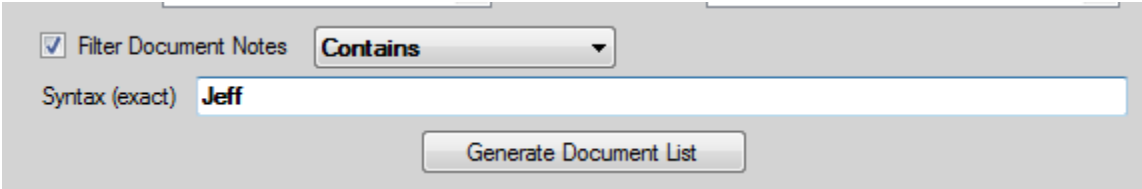
- When the selection is complete, click on the *Generate Document List* button below the Event Class window. This will generate a list of documents in the selected Matter matching the combination of Event Class and Document Type chosen.
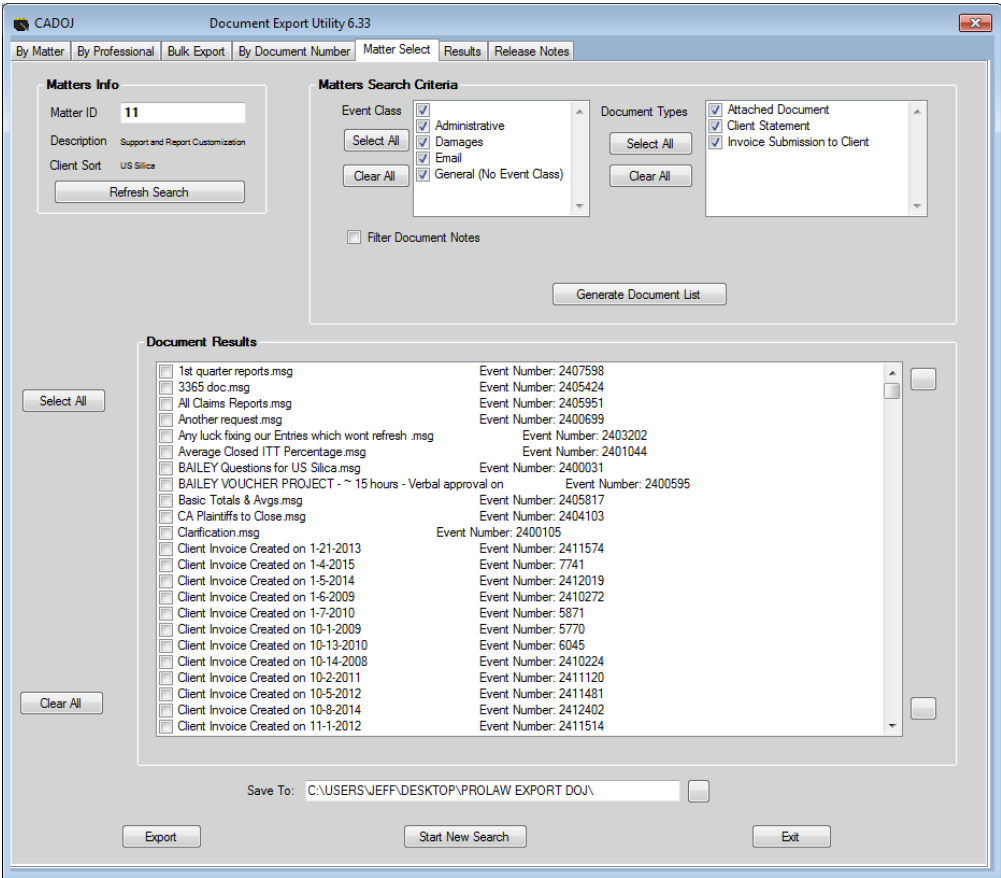
- The *Save To* field and button work as described in previous tabs to allow you to determine the drive and folder where the exported documents will go.
- Documents will show on the list with both the first line of the description of the document that is in the Notes Field on the Matter as well as the Document Number (Shown as *Event Number*).
- There is a *Check All* and a *Clear All* button to facilitate selection. One can check any or all documents listed in the window.
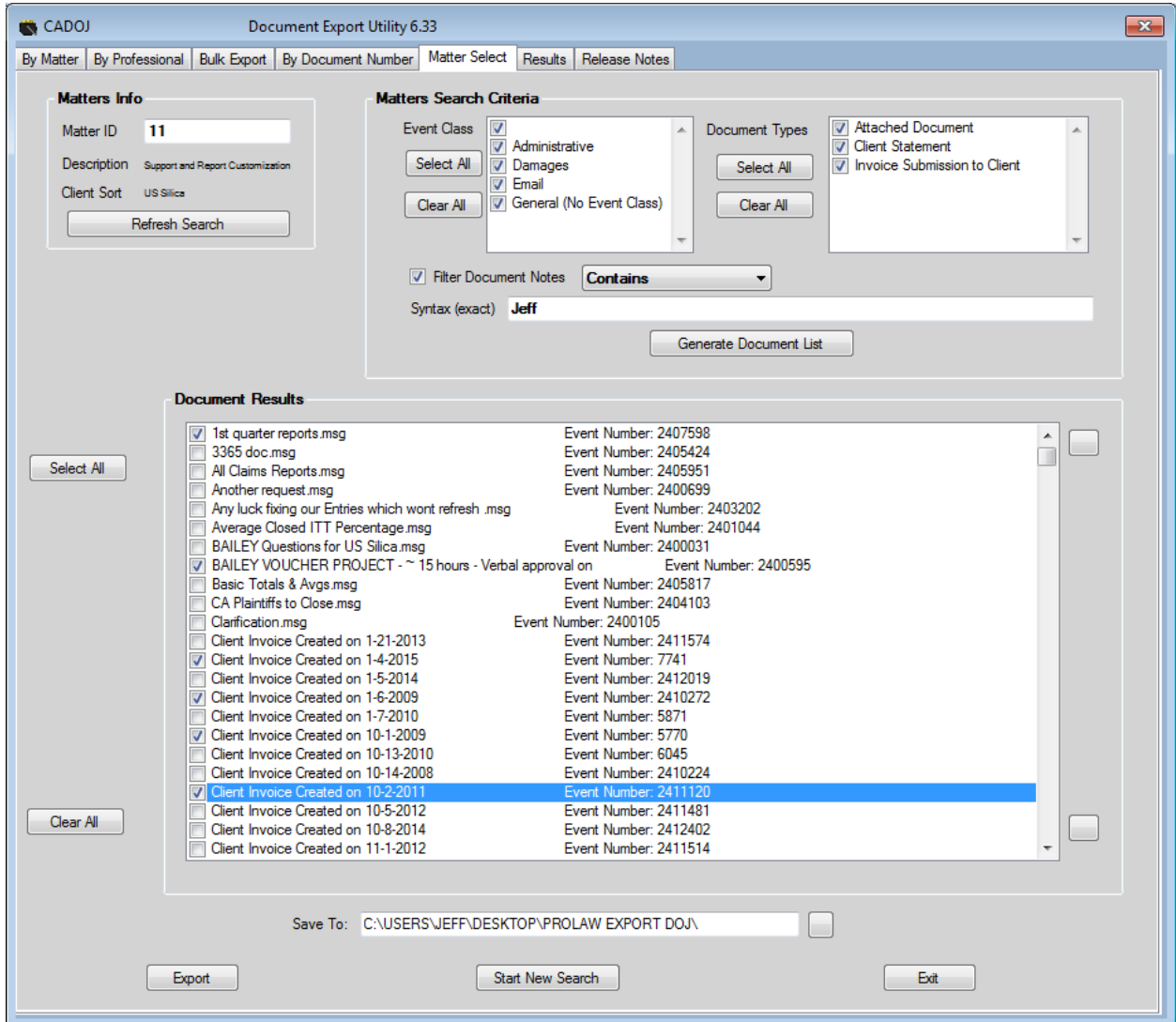
- Select which document(s) to export then click on the *Export* button at the bottom of the tab.
- A green bar at the bottom of the document list window will show the progress of the export.
- The word Complete will display in red to the left of the *Refresh Search* button.
- The *Refresh Search* button above the document list window allows you to restart your search in the same Matter if changes are made after the search has begun.
- The *Start New Search* button clears the tab and allows for a new Matter to be selected for a new search.

EXPORTING CONTACT DOCUMENTS

Contact Documents Tab
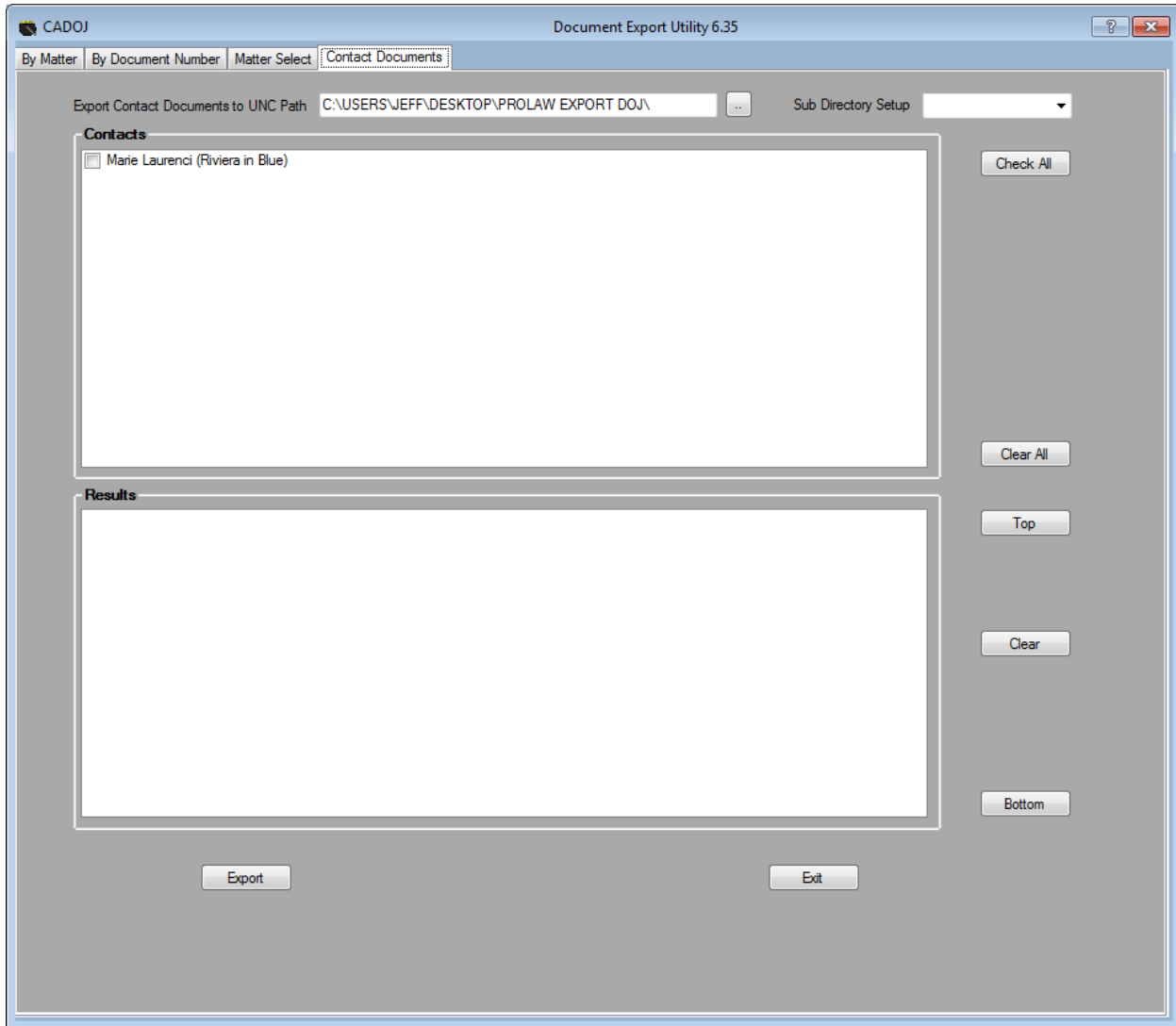
The Contact Documents tab is extremely easy to use with very few options. When you switch to the tab the Contacts section is already populated with the names of all contacts in your database that have documents associated with them. The contacts are listed in alphabetical order in the Full Name (Company) format. Simply select your export destination, the Sub Directory Setup (this allows you to select the directory structure the exported documents will appear in). Your choices are ProLaw Preferences, Full Name (Company), Company (Full Name), Full Name or Company. Select Export. Your documents will be copied to the destination location. That easy.

ADDITIONAL TABS

Bulk Export Tab

The Bulk Export Tab is used to export data via SQL Tables or Text Files. This should only be used by your IT staff in coordination with instructions from jSQL LLC.
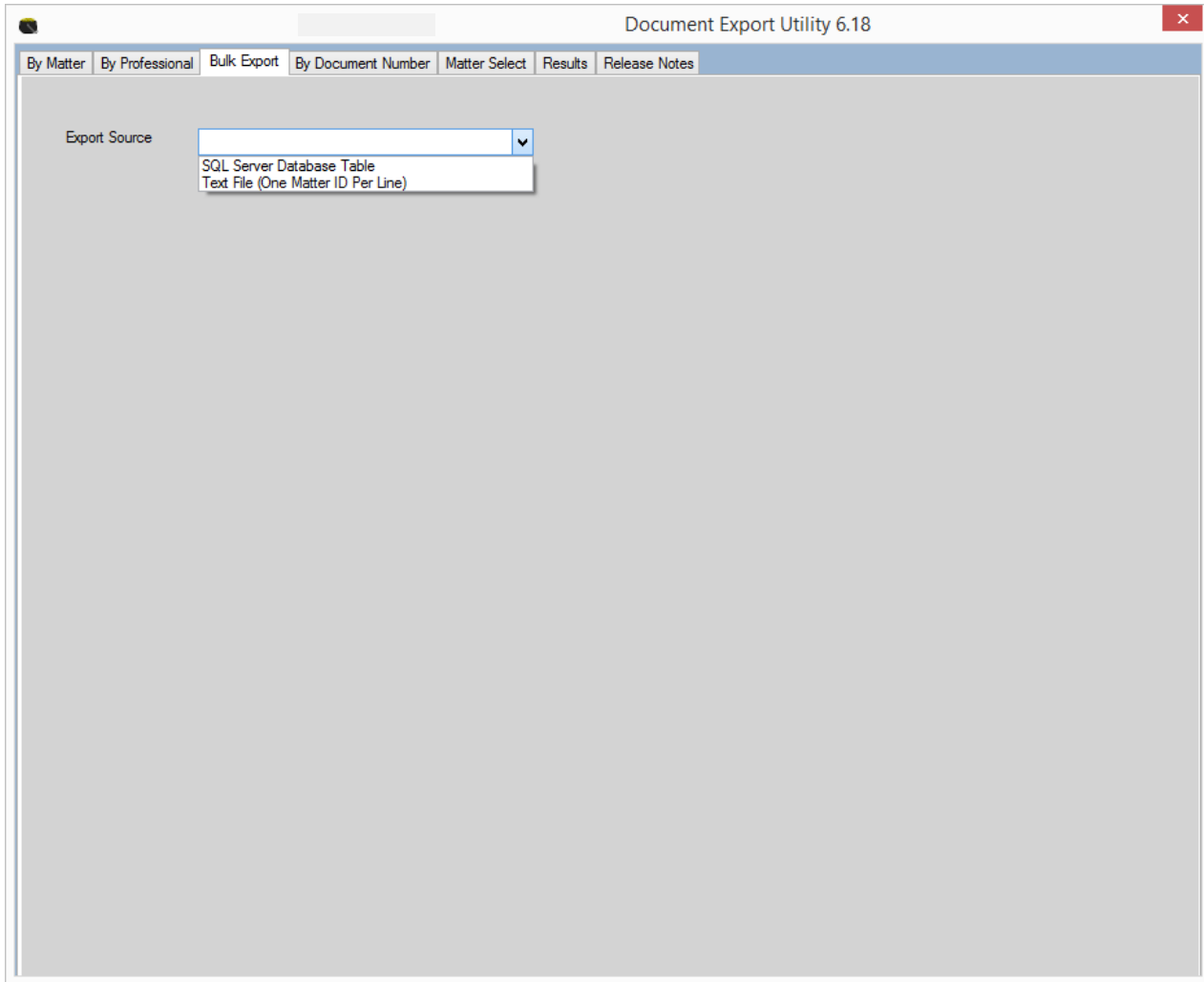
Results Tab

The Results Tab will provide information similar to the Application Feedback window on the By Matter tab. It is not currently operative.

Release Notes Tab

This tab provides a history of updates to the Document Export Utility.

Help File Assistance

You can open up this help file while working in the application by pressing F1 or selecting the ? in the upper right hand corner of the application.

HIDDEN FEATURES

Sometimes firms need to export a lot of documents. I mean a real lot of documents. This is actually very easy to do if you know the Matter IDs of the Matters. It does take a little technical familiarity with SQL Server, hence why we have buried this information in the Hidden Features section. Here is how you do it, in SQL Server create a table that houses the MatterID and Matters primary key data for the matters you want to export. The basic query will be something like this:

Select MatterID, Matters INTO MATTERSEXPORT from Matters where MatterID in ('1233-100','1233-101')…. etc

This will put the two columns of data into a table called MATTERSEXPORT. You can name the table anything you want, but the system comes preconfigured to look for MATTERSEXXPORT. If you use a different table name then make sure you update the configuration table line

```
<add key="CustomTable" value="MattersExport"/>
```

To reflect that table name.

Next launch the Document Export Utility. In the Matter ID field, type CUSTOM. Select all the various filters and settings you that control how the output is organized and select Export Documents. The process will spin through the matters contains in your custom table, exporting them as if you have put the Matter ID in one at a time. Saves lot of time!

TECHNICAL NOTES

Some Notes for Technicians Working with the Document Export Utility

Changes can be made to the configuration of the Document Export Utility. Please confirm any changes with ¡SQL prior to implementation.

- The length of the document name as exported can be changed using the parameter DocumentNameLength
  Begin adjusted
- The Document Numbers as assigned by ProLaw can be maintained in the export (KeepDocNumbers). If different numbers should be assigned use ReNumberStartingIndex and ReNumber. This can be useful when exporting documents for conversions or moving to different systems.
- The *By Professionals, Bulk,* and *Release Notes* tabs can each be hidden from within the Configuration File.

```
<add key="Professionals" value = "False" />

<add key="Bulk" value = "False" />

<add key="ReleaseNotes" value = "True" />
```

- Easily Customize the Save As location with these helpful tricks:

```
<add key="FilePath" value = "desktop\ProLaw Export" />
```

- o Coding the FilePath key in the Configuration file with 'DESKTOP', , 'DESK TOP', 'MY DOCUMENTS', 'MYDOCUMENTS' will cause the application to search for that location in the registry and automatically put it into the Save As field location. Note you can then add subdirectories. In the above example the files would be saved to the end user's Desktop to a folder called 'ProLaw Export'

- To enforce Item Level Security when exporting, you will need to set the configuration preference. This limits the professional that is using the application to only be able to see what they can see via the ProLaw interface.

```
<add key="InforceILS" value="False"/>
```

- Change the length of the output file name by adjusting this Configuration File key. The acceptable range is between 70 and 150 characters.

```
<add key="DocumentNameLength" value = "70" />
```

- If you want to provide the end user with the ability to select which matters to export from a list of matters you need to set the below configuration setting to true.

```
<add key="AllowMattersList" value="true"/>
```

After setting the configuration file value to true, the end user can type something like 1% to pull up a list of all matters that begin with the value 1. The % used in conjunction with the configuration setting is what controls this behavior. After typing in the 1% the user will need to select the Validate Matter Id button. This will result in the following window appearing. Select 1 or more matters from the list and hit the Process button. This will load the list of matters to be exported into the MatterID text box. You still need to configure everything else and select Export Documents.
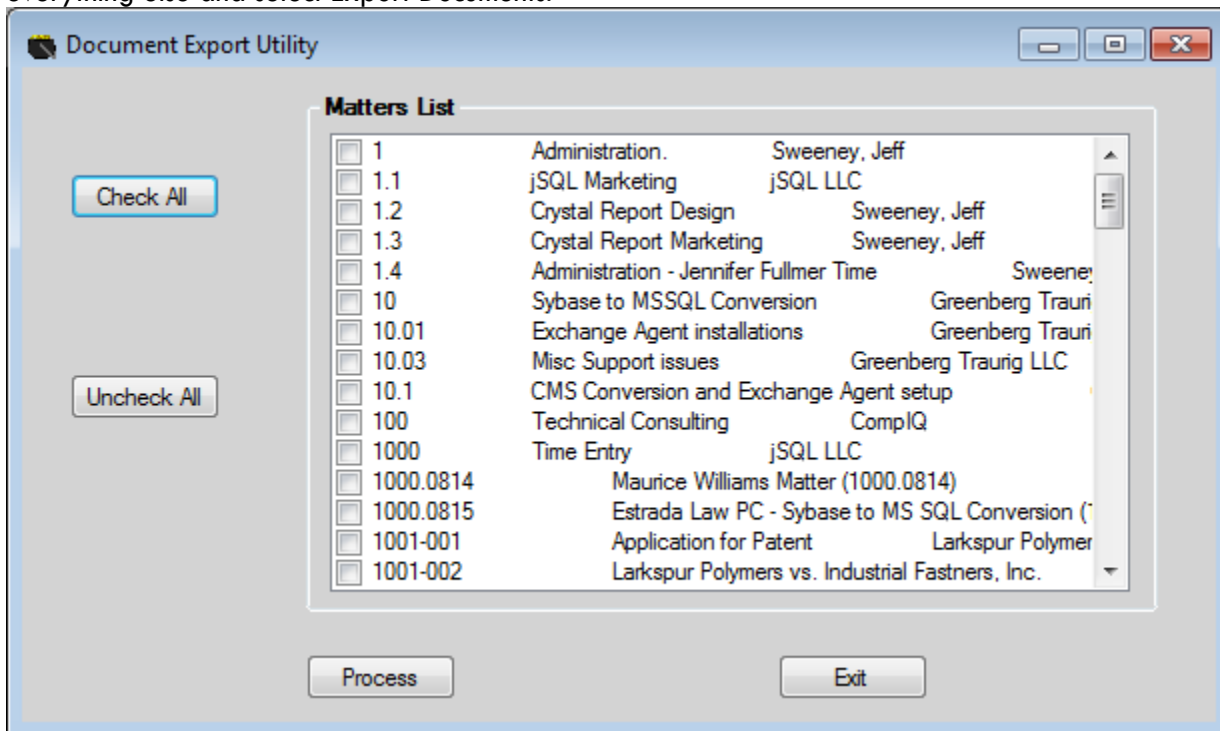
- Hiding certain tabs. It is very easy to do, you simply adjust the configuration file settings listed below. The name of the tab you hide is prefixed by the word 'Hide'. True means you hide the tab, false means it is visible. There is no way to make tabs visible on a by professional/user basis.

```
<add key="HideByMatter" value="FALSE"/>
<add key="HideReleaseNotes" value="TRUE"/>
<add key="HideDocumentNumber" value="FALSE"/>
<add key="HideProfessionals" value="TRUE"/>
<add key="HideBulk" value="TRUE"/>
<add key="HideResults" value="TRUE"/>
<add key="HideMatterSelect" value="false"/>
<add key="HideContactsExport" value="False"/>
```

- For further customizations, please contact jSQL LLC.