Outlook Contacts & Calendar Synchronization

Applies to:
- Small Firm Edition (Amicus Small Firm/Amicus Attorney 2008)

Contents

Overview

Amicus Attorney offers a bi-directional synchronization feature with Microsoft Outlook that aligns the information contained in your Contacts, Appointments, and Tasks/To Do's in both applications. Once enabled, the synchronization is completely dynamic. When you add, modify, or delete a record in Amicus Attorney, it will appear or disappear automatically in Outlook, and vice-versa. You can configure this feature to exchange any combination of Contacts, Appointments, and Tasks/To Do's in either or both directions.

Outlook Contacts & Calendar Synchronization is an ideal vehicle for migrating your data into Amicus Attorney, for large firms where all members use Microsoft Outlook but not all members use Amicus Attorney, or for firms where employees make frequent use of Personal Digital Assistants (PDAs). Scenarios in the following section give you an idea of how some firms have employed the feature.

This document provides details about how the Outlook Contacts & Calendar Synchronization feature handles various File associations, Team Member and Contact Group assignments, and custom field synchronizations. An Installation Checklist indicates the steps you should take when first implementing Outlook Synchronization. Further information is provided on how to set up the feature, map the Team Members, use the re-synchronization utility, and ensure that the feature runs smoothly.

E-mail Integration is a separate feature, which integrates your Amicus Attorney e-mail with a third-party e-mail program, such as Microsoft Outlook or Novell GroupWise. For details, please see the *User Guide* or the Online Help.

IMPORTANT: *If your firm will recognize no real benefit from using Outlook Synchronization, then we do not recommended that you enable this feature. By reason of its dynamic capabilities, it will increase your network traffic and the load on your Server due to the expanded number of transactions being processed through your Amicus Attorney database.*

Software Requirements

- Amicus Small Firm - Amicus Attorney Small Firm Edition, or Amicus Attorney 2008 Small Firm Edition
- Microsoft Outlook — for versions supported, please see the appropriate *Hardware & Software System Requirements* document, available from the Support > Technical Resource Guides section of our website

Advantages of Using Outlook Synchronization

Scenario 1 – The Legal Department: This feature is ideal for large organizations that use Microsoft Outlook on a company-wide basis and have one or more individual departments that run Amicus Attorney. For example, a large retailer employs 350 people at their head office, 25 of whom are running Amicus Attorney in the Legal Department. The members of the Legal Department interact on a daily basis with various other departments within the organization. They have the advantage of utilizing the strong case-management tools provided by Amicus Attorney, while continuing to work with the company's Outlook Workgroup environment—all without the necessity of having to enter data twice.

Scenario 2 –The Wireless Device: Amicus Attorney has for many years supported a link with the Palm operating system. Adoption of the Palm operated handheld device has proven to be enormously popular, with millions sold worldwide. However, there are numerous other handheld devices on the market that do not support the Palm OS®, such as the HP™ iPAQ™ and the RIM® BlackBerry™. Regardless of the device used, mobile professionals can now merge their Contacts, Appointments and Tasks with their Amicus Attorney data by employing the Outlook Synchronization feature. And because Outlook Synchronization with Amicus Attorney is done automatically, users need not employ any additional steps.

Jane is a busy litigation lawyer who uses Amicus Attorney to manage her practice. She always carries her HP iPAQ Pocket PC handheld with her. While out of town meeting with a client, John Smith, Jane uses her PDA to set up an Appointment for them to meet again to further discuss the details of his case. She enters the name of John's file in the Notes section. When Jane returns to the office the next day, she synchronizes her iPAQ with Outlook. Upon launching Amicus Attorney, Outlook Synchronization runs automatically. Jane's Calendar in Amicus Attorney displays the Appointment she entered into her iPAQ, and it also appears on John's File.

Scenario 3 – Transitioning to Amicus Attorney: Those who adopt Amicus Attorney throughout their firm, and who previously relied on Microsoft Outlook for managing their Calendar and Contacts, soon find that the practice management features in Amicus Attorney far exceed those that are available in Outlook. Many have discovered that Outlook Synchronization is a valuable tool for migrating their data over to Amicus Attorney quickly and easily.

Monahan & White is a 15-member law firm that recently deployed Amicus Attorney to all staff, having found that they required a file-centric software solution to help run their practice. All lawyers, paralegals, and assistants in their organization have used Microsoft Outlook with Exchange for the past three years. As part of their implementation strategy, they first ensured that Amicus Attorney was configured with similar Contact groups, Contact custom fields, and Task priority values. They also mapped their Amicus Attorney Team Members to their Outlook Address Book. After initializing the link to their accounting software, which created their Files and Clients in Amicus Attorney, each user entered the Short File Name, where applicable, in the Notes field of important Appointments and Tasks in their Outlook Calendar. On a rotating basis, each user enabled the Outlook Synchronization feature at their Amicus Attorney workstation. (*Note***:** Attempting to run the initial synchronization at all workstations simultaneously is not recommended as this causes problems with the Exchange Server and may result in inconsistent results.) Following the completion of the Amicus Attorney deployment, Monahan & White disabled the Outlook Synchronization feature.

You may be asking yourself why they chose to disable the synchronization. They did so for several reasons:

1. They found that their staff no longer had any reason to use the Outlook Calendar to schedule or view appointments. The Amicus Attorney Calendar Group view

offered them full functionality for booking Appointments for multiple Team Members, allowed them to view Appointments and To Do's filtered by File, view only Critical/Milestone Events, and to find the next suitable time when the Executive Committee was available for a meeting.

2. Similarly their staff enjoyed creating and tracking To Do's in Amicus Attorney, linking them with not just Contacts, but more importantly Files. And, using the DO™ button saved them valuable time.
3. Their smooth transition planning brought over all their Contact information, including custom field information.
4. All lawyers and paralegals in the firm use Palm handlhelds, so the direct Amicus Attorney-Palm Link can be used instead of going through Outlook.
5. Disabling the synchronization decreased their start up time when launching Amicus Attorney, reduced the load on the server, and eliminated any minor inconsistencies that may occur by reason of missing Start or Due dates, or dissimilar phone number formatting.

How Amicus Attorney-Outlook Synchronization Works

When Amicus Attorney–Outlook Synchronization is first enabled, an initialization process takes place. This process will compare the respective records contained in each application. Depending on the number of records you have, the process may take some time to complete.

AA Record Key

When you initialize Outlook Synchronization for the first time, the Contacts, Appointments, and Tasks/To Do's being compared and exchanged between the two programs are linked together using unique identifiers. For all Amicus Attorney records that do not exist in Outlook, a new record is sent over to Outlook containing the AA Record Key. For all Outlook records that do not exist in Amicus Attorney, the record is sent to Amicus Attorney, the properties for the record are set, an AA Record Key is generated, and the AA Record Key is sent back to Outlook.

In Outlook the AA Record Key is stored in a user-defined field called the AmicusEntryId. This field is automatically created in Outlook during the initialization process for Contacts, Appointments, and Tasks.

Displaying the AA Record Key in Outlook

The AA Record Key field, called AmicusEntryID, is viewable in Outlook even though they are not viewable in Amicus Attorney. However, you should not attempt to manually change these values, as this will cause the records to become out of synchronization. (A utility is available to handle re-synchronization should this be necessary. See the *Troubleshooting* section for details.)

1. In Outlook, change the current view to one that lists fields.
   In Contacts, choose View > Current View > Phone List.
   In Outlook Tasks, choose View > Current View > Simple List.
   In Outlook Calendar, choose View > Current View > By Category, choose View > Current View > Customize Current View and, in the View Summary window, click Group By, and, in the Group By window, select (None) in the Group Items By box, and click OK.
2. Select the AmicusEntryID field for display. To do this, right-click on the column header and choose Field Chooser. In the Field Chooser window, choose "User-defined fields in folder", select AmicusEntryID from the list, and click OK.

When Synchronization Occurs

Synchronization occurs:

- when you first enable Outlook Synchronization (called "initialization")
- *if the Real-Time option is selected in your preferences*: automatically each time you start Amicus Attorney, and when you create, change, or delete any Contact, Appointment, or Task/To Do in Outlook or Amicus Attorney, subject to your preference settings.
- *if the On Command option is selected in your preference:* when you choose the Exchange with Outlook command from the File menu in Amicus Attorney.

If Outlook is not already running when Amicus Attorney starts, Amicus Attorney will start Outlook automatically as a background process (not shown in your Windows taskbar) and your usual Outlook startup prompts, if any, will appear.

Deletions are synchronized a little differently than additions and changes. Although deletions of events and/or contacts in Amicus Attorney are reflected in Outlook "immediately" (as described below), deletions in Outlook are reflected in Amicus Attorney only when Amicus Attorney is next started or when a user processes deletions (by selecting Process Deletions from Outlook on the OFFICE menu in the Office module).

Outlook Synchronization in Other Circumstances

Amicus Attorney Secondary Office

Outlook Synchronization does not function from a Secondary Office. You can work on Events and Contacts in Amicus Attorney at your Secondary Office, and the pack a Briefcase there. When you unpack that Briefcase at your Primary Office, Outlook Synchronization will take place.

Working Offline

If you remain connected to Outlook (or at least have access to local Outlook folders) after you Go Offline at your workstation, Outlook Synchronization continues to take place. Otherwise, synchronization does not occur until you Go Online or do a Remote Update.

File Associations

Because there is no equivalent to Amicus Attorney Files in Outlook, records sent from Amicus Attorney to Outlook will assign the File Name, Client ID, and Matter ID of the associated File, if applicable, to the Notes field of Outlook records.

The synchronization extends your ability to make File associations while working in Outlook. You can enter the File name, Client ID, and Matter ID in the Notes section of any Appointment or Task, in order to create an association with that File in Amicus Attorney, provided that you have entered the information in the proper format and a match is found in Amicus Attorney. The proper format is shown in the following example:

File: Smith v. Jones
ClientID: 1234
MatterID: 5678

Note: It is not necessary to include all three fields - you can provide either the File Name alone, or just the Client ID and Matter ID. A carriage return is required between the fields. Entries (e.g., “Smith v. Jones”) are case-sensitive, but the tags (e.g., “File:”) are not case sensitive. A space is required between the tag’s colon and the beginning of the entry.

Events (Appointments and Tasks/To Do's)

When you create an Appointment or Task in Outlook, a corresponding Appointment or To Do is also created in Amicus Attorney if you are mapped to an Amicus Attorney Team Member, have Outlook Synchronization enabled, and have appropriate Preferences set in Amicus Attorney. Otherwise, the Event will remain only in the Outlook record.

When you create an Appointment or To Do in Amicus Attorney, a corresponding Appointment or To Do is created in Outlook if you have Synchronization enabled, and have appropriate Preferences set.

Repeating Events

Amicus Attorney and Outlook do not have exactly corresponding fields. One area you might notice some effects of this difference is in repeating events.

The “Move to Next Business Day” and “Move to Previous Business Day” options in Amicus Attorney are not supported in Outlook. For example, if a weekly Appointment set for Fridays falls on a vacation day one week, and you have the Appointment set to "Move to Previous Business Day", then that week's instance will be scheduled on Thursday in Amicus Attorney but will still be scheduled on Friday in Outlook. If you were to edit that Appointment instance in Outlook, it would then change back to Friday in Amicus Attorney as well (and be automatically reset to "Schedule it anyway").

The [number] "days after Easter" frequency option in Amicus Attorney is not supported in Outlook. For example, if the first instance of such an Appointment falls on a Tuesday, then in Outlook the Appointment will be set to occur weekly (the default frequency) on Tuesdays.

The multiple selection of days in a weekly pattern in Outlook is not supported in Amicus Attorney. For example, if an Appointment is set in Outlook to occur on Mondays and Thursdays, and the first instance falls on a Thursday, then it will be scheduled in Amicus Attorney as a weekly Appointment on Thursdays.

Internally, Amicus Attorney and Outlook manage exceptions to a repeating Appointment differently. For simplicity and reliability, these exceptions are synchronized only from Amicus Attorney to Outlook, not vice versa. If you delete a repeating Appointment in Amicus Attorney, all instances are deleted in both Amicus Attorney and Outlook. However, if you delete a repeating Appointment in Outlook, you will then need to manually delete the exceptions in Amicus Attorney or in Outlook. (This is Important Information item p1250.)

Internally, Amicus Attorney and Outlook manage exceptions to a repeating To Do/Task differently. For simplicity and reliability, these exceptions are not synchronized between Amicus Attorney and Outlook in either direction. (This is Important Information item p1251.)

Event Category

If you add or change an Appointment or Task in Outlook with a Category that does not match an existing Category in Amicus Attorney, that Category will not be added in Amicus Attorney. And, therefore, the Appointment or To Do will not be assigned to a corresponding Category in Amicus Attorney

However, if you add or change an Appointment or To Do in Amicus Attorney with a Category that does not match an existing Category in Outlook, a matching Category will be added to your Outlook Category list. The new Category name will be followed by the note: “(Not in Master Category List)”. In addition, the Appointment or To Do will be assigned to this new Category in Outlook.

We recommend that you ensure that all Event Categories in Amicus Attorney have a corresponding entry in your Outlook Master Category List.

Note: Outlook Categories are stored locally, in the Windows Registry on each user's workstation. For advice on how to migrate custom categories, consult the appropriate "How to Migrate Custom Categories to Other Users" article in the Microsoft Knowledge Base:

- for Outlook 2000, see article 197342 at http://support.microsoft.com/default.aspx?scid=kb;en-us;197342
- for Outlook 2002, see article 297405 at http://support.microsoft.com/default.aspx?scid=KB;EN-US;Q297405&

Amicus Attorney's "Red Letter Day" Event Category is synchronized with Outlook's "All day event" option.

Priority of a Task/To Do

The Task Priority in Outlook is synchronized with the To Do Priority in Amicus Attorney, based on the Priority levels defined in Amicus Attorney.

From Amicus Attorney Priority	To Outlook Priority
Level 1, typically named Top	High
Level 2, typically named High	High
Level 3, typically named Avg	Normal
Level 4, typically named Low	Low
Level 5, typically named Soon	Low
Level 6, typically named Someday	Low

From Outlook Priority	To Amicus Attorney Priority
High	Level 2, typically named High
Normal	Level 3, typically named Avg
Low	Level 4, typically named Low

Meeting or Task Requests

The exchange of collaborative meeting and task requests is not supported.

If you are using Outlook collaboratively, and you create an Appointment or Task in Outlook and assign Required Attendees, Optional Attendees, or Resources, each one is sent an e-mail request in Outlook. Upon synchronization, the appointment or task is created in your Amicus Attorney with the default associations specified for new Appointments in your Calendar preferences. No e-mail requests will be sent within Amicus to confirm the appointment or task. Then, in Amicus, you can change the list of Team Members associated with the Appointment.

If you create an appointment or task in Amicus Attorney and assign another Team Members to it, you are all scheduled immediately in Amicus Attorney. Upon synchronization, the appointment or task is created in your Outlook and in each Team Members' Outlook, but no e-mail requests will be sent within Outlook to confirm the appointment or task.

Task Start Dates and End Dates

In Amicus Attorney, a To Do must have a Start Date but does not require a Due Date. In Outlook, a Task does not have to have a Start Date, but if it has, it must also have a Due Date. Therefore, in Outlook, do not create Tasks without both a Start date and a Due date.

Past Appointments

If an Appointment in Amicus Attorney has a date before today, then when Outlook Synchronization is first enabled (or re-enabled or re-synchronized), the Appointment is sent to the first Team Member's Outlook but Outlook meeting requests are not sent to any associated Team Members. If you later delete the Appointment, it is deleted in the first Team Member's Calendar only.

Past Tasks/To Do's

If a To Do in Amicus Attorney has a date before today, it must be a Done To Do. When Outlook Synchronization is first enabled (or re-enabled or re-synchronized), the To Do is sent to Outlook but Outlook task requests are not sent to any associated Team Members.

If a non-Completed Task in Outlook has a date before today, then when Outlook Synchronization is first enabled (or re-enabled or re-synchronized), the To Do is given today's date in both Amicus Attorney and Outlook.

Restricted Events

Both Amicus Attorney's Restricted setting and Outlook's Private setting are ignored in Outlook Synchronization. And Amicus Attorney's "Personal" Event Category has no effect on synchronization.

Contacts

Contact Group

If you add or change a Contact in Outlook with a Category that does not exist as a Contact Group in Amicus Attorney, that Category will not be added in Amicus Attorney as a new Contact Group. And, therefore, the Contact will not be assigned to a corresponding Contact Group in Amicus Attorney.

However, if you add or change a Contact in Amicus Attorney with a Contact Group that does not exist as a Category in Outlook, a matching Category will be added to your Outlook Category list. The new Category name will be followed by the note “(Not in Master Category List)”. In addition, the Contact will be assigned to this new Category in Outlook.

We recommend that you ensure that all Contact Groups in Amicus Attorney have a corresponding entry in your Outlook Master Category List.

Note: Outlook Categories are stored locally, in the Windows Registry on each user's workstation. For advice on how to migrate custom Categories, consult the appropriate "How to Migrate Custom Categories to Other Users" article in the Microsoft Knowledge Base. For example:

- for Outlook 2000, see article 197342 at http://support.microsoft.com/default.aspx?scid=kb;en-us;197342
- for Outlook 2002, see article 297405 at http://support.microsoft.com/default.aspx?scid=KB;EN-US;Q297405&

Contact Custom Fields

If you wish to synchronize information in Contact custom fields, ensure that the Outlook user-defined fields (configured through Outlook’s Contacts > All Fields tab > New > New Field > Name) match the Amicus Attorney custom field labels and types (created through the Amicus Administrator Configure> Contacts menu).

For each Contact, if the value in an Amicus Attorney field (date, number, text, true/false, list) cannot be converted to the proper format in the Outlook field, the field value is not synchronized.

Restricted Contacts

Both Amicus Attorney's Restricted setting and Outlook's Private setting are ignored in Outlook Synchronization.

Field Mapping between Amicus Attorney and Outlook

Below are the Contact, Appointment, and To Do/Task fields that are exchanged between Amicus Attorney and Outlook.

Outlook Contact Fields	Amicus Attorney Contact Fields
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Title	Prefix
(Body)	Notes
Categories	Contact Groups
Business Address Street	Office Card Street Address
Business Address City	Office Card City
Business Address ZIP/Postal Code	Office Card Zip/Postal Code
Business Address State/Province	Office Card State/Province
Business Address Country/Region	Office Card Country
Company	Office Card Company
Job Title	Office Card Job Title
Home Address Street	Home Card Street Address
Home Address City	Home Card City
Home Address ZIP/Postal Code	Home Card Zip/Postal Code
Home Address State/Province	Home Card State
Home Address Country/Region	Home Card Country
Other Address Street	Other Card Street
Other Address City	Other Card City
Other Address ZIP/Postal Code	Other Card Zip/Postal Code
Other Address State/Province	Other Card State/Province
Other Address Country/Region	Other Card Country
Business (Phone)	Office Card Business Phone
Home (Phone)	Home Card Home Phone
Other (Phone)	Other Card Other Phone
Business 2 (Phone)	Office Card Business2 Phone
Home 2 (Phone)	Home Card Home2 Phone
Assistant (Phone)	Office Card Assistant Phone
Mobile (Phone)	Mobile Phone *
Car (Phone)	Car Phone *
Pager (Number)	Pager Phone *
ISDN (Number)	ISDN Phone *
Business Fax (Number)	Office Card Business Fax
Home Fax (Number)	Home Card Home Fax
Other Fax (Number)	Other Card Other Fax
E-mail	Office Card Business E-mail
E-mail2	Home Card Home E-mail
E-mail3	Other Card Other E-mail
Web Page Address	Office Card Business Web
User-Defined Field Name	Custom Field Label

* Amicus Attorney fields entered in the Communications tab, and displayed and edited in the Home, Office, and Other cards.

NOTE: Amicus Attorney’s "This is the Primary Card" setting and Outlook’s "This is the mailing address" setting are synchronized.

Outlook Appointment Fields	Amicus Attorney Appointment Fields
Subject	Title
Reminder(checkbox)	Remind me
Reminder (minutes before start)	Minutes Before
(Body)	Notes
Categories	Category
Start (Date and) Time	(Start) Date and Time
End Time	To (Time)
Attendees (Required, Optional, Resources)	Assigned
Recurrence Pattern	Repeat

Outlook Task Fields	Amicus Attorney To Do Fields
Subject	Title
Complete: Completed	Done
(Body)	Notes
Start Date	Date
Due Date	Deadline
Priority	Priority
Categories	Category
Recipients	Assigned
Recurrence Pattern	Repeat

Initialization Checklist

1. Each Team Member should consider deleting or archiving any unnecessary records.
2. Each Team Member should ensure that the Outlook Contact and Address Book information is correct.
3. To avoid duplicates, each Team Member should ensure that matching records have the same information in the fields used for matching. (See "Outlook-Conflicts Preferences" on page 13.)
4. (Optional) The Team Administrator should ensure that all Event Categories in Amicus Attorney have a corresponding entry in the Outlook Master Category List. (See "Event Category" on page 6.)
5. (Optional) The Team Administrator should ensure that all Contact Groups in Amicus Attorney have a corresponding entry in the Outlook Master Category List. (See "Contact Group" on page 8.)
6. At each Team Member's workstation, enable Outlook Synchronization and set Preferences. Click OK. The initial synchronization starts immediately, and might take several minutes. (See "Enabling Outlook Synchronization and Setting Preferences at the Team Member Workstation" on page 10.)

Enabling Outlook Synchronization and Setting Preferences at the Team Member Workstation

Before enabling Outlook Synchronization, it is highly recommended that each Team Member first review the preferences available so that they are applied properly upon initialization.

From the Amicus Attorney File menu, select Preferences and choose the Office tab.

Enabling Outlook Synchronization

Outlook does not need to be running for the synchronization to be effective in Amicus Attorney, unless your Outlook configuration requires you to select a user profile or specify the connection type (i.e., Work Offline/Connect) each time you start Outlook. In these cases, Amicus Attorney will prompt you to run Outlook.

IMPORTANT: For performance reasons, especially at a firm using Microsoft Exchange, we do NOT recommended that all Team Members initialize at the same time.

Note: If you have temporarily disabled Outlook Synchronization at your workstation, and then select the Enable Contacts & Calendar Synchronization checkbox to re-enable it, a complete re-synchronization occurs.

To enable Outlook Synchronization:

1 From the Amicus Attorney File menu, choose Preferences.

2 Click the Outlook–General tab and select the Enable Contacts & Calendar Synchronization checkbox.

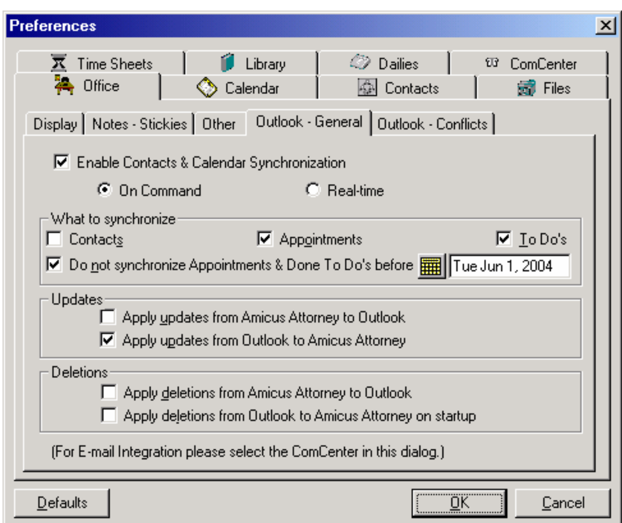
3 Set your Outlook Synchronization preferences, on this tab and the Outlook-Conflicts tab.

4 Click OK. The synchronization process begins immediately, and may take several minutes as records are created and synchronized on both sides.

Setting Preferences

There are two tabs for setting your Outlook Synchronization Preferences: Outlook–General and Outlook–Conflicts.

Outlook-General Preferences



When Do You Wish Records To Synchronize?

Select the On Command option if you wish synchronization to take place only when you choose the “Exchange with Outlook” command from a File menu in Amicus Attorney. Or, select the Real-time option for automatic synchronization.

Which Records Do You Wish To Synchronize?

You can select any combination of Contacts, Appointments, and To Do's for synchronization by activating or deactivating the checkbox for each option.

Cut-off Date Option

To prevent old Appointments and Done To Do's (Completed Tasks) from being exchanged, select the “Do not synchronize Appointments & Done To Do's before” option and choose a cut-off date. This can shorten the initialization time and keep old records from cluttering your new database. This option affects synchronization in both directions. Old records will continue to be ignored in ongoing synchronizations, even if you subsequently edit them in Outlook or Amicus Attorney.

Note: After initialization, changing the cut-off date has an effect only if you then re-enable synchronization or do a re-synchronization.

Update Options

To set your update options, select the Outlook–General tab. Team Members can choose which direction changes will be applied:

- Apply updates from Amicus Attorney to Outlook: All changes made in Amicus Attorney records will be reflected in Outlook.
- Apply updates from Outlook to Amicus Attorney: All changes made in Outlook records will be reflected in Amicus Attorney.

If a Team Member is adding and changing records in both Amicus Attorney and Outlook, they should apply updates in both directions.

Deletion Options

Important: See the Troubleshooting section for important information on setting your deletion preferences before archiving your Amicus Attorney or Outlook records.

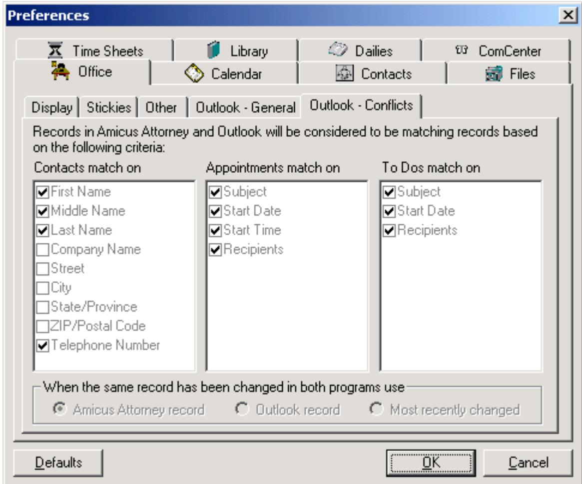
Team Members can choose which direction deletions will be applied:

- Apply deletions from Amicus Attorney to Outlook.
- Apply deletions from Outlook to Amicus Attorney on startup: These deletions will be processed whenever you restart Amicus Attorney. Please note that this option will result in lengthier processing.

  Note: As a precaution, if more than ten deletions are detected in Outlook, none of the deletions will be processed in Amicus Attorney. A large number may indicate that the current state of your Outlook records requires review. For example, changes in your default Outlook profile, or synchronizing your Outlook with other third-party products, could otherwise result in unwanted deletions in Amicus Attorney. If you wish to proceed with the deletions anyway, you can choose a menu item in your Amicus Attorney Office (OFFICE > Process Deletions from Outlook).

If a Team Member is deleting records in both Amicus Attorney and Outlook, they should apply deletions in both directions.

Outlook-Conflicts Preferences



Which Fields To Match On

The three windows in the Outlook-Conflicts tab permit you to select the match criteria on which the synchronization process will be based for each Contact, Appointment, and Task/To Do. An Amicus Attorney record will match an Outlook record only if all of the selected fields have the same content. We recommend that you do not clear any of the default criteria.

Which Record To Keep When a Match Occurs

Conflicts occur when the same record has been modified in both Outlook and Amicus Attorney. You can choose to keep the Amicus Attorney record, the Outlook record, or the one that was most recently changed. However, if you have chosen to apply updates or deletions in only one direction (i.e., from Amicus Attorney to Outlook, or vice-versa), you cannot choose to keep the record in the other application.

Troubleshooting

Archiving and Dearchiving

It is recommended that the Re-synchronization utility be used when records have been dearchived in either Outlook or Amicus Attorney. When a dearchive is carried out, it is most likely that you will need to re-synchronize so that every record will be accounted for and up to date in both programs.

If you archive records that include Contacts, Appointments, and/or To Do's, these records will be flagged as 'deleted'. Team Member deletion preferences may cause the record to also be deleted in Outlook and vice versa. Follow the recommendations below in order to avoid this.

If you perform an archive in Amicus Attorney or Outlook and wish to retain all of your corresponding records, it is very important that you first disable the following deletion options from your Amicus Attorney Preferences, Outlook General tab:

- If you are performing an archive in Amicus Attorney, ensure that the "Apply deletions from Amicus Attorney to Outlook" checkbox is NOT selected.
- If you are performing an archive in Outlook, ensure that the "Apply deletions from Outlook to Amicus Attorney on startup" checkbox is NOT selected.

Using the Re-synchronization Utility

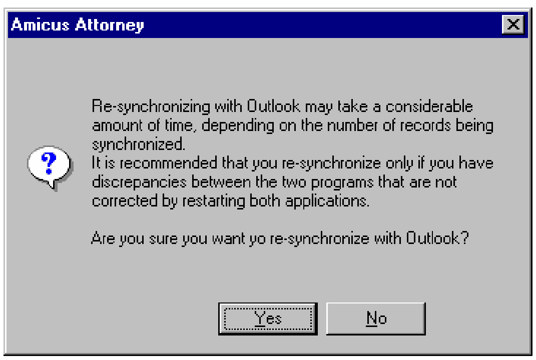
Your Amicus Attorney and Outlook records might have become out of synchronization. Discrepancies may be due to some major change that has occurred in the Amicus Attorney database or the Outlook database. Such a situation may occur after restoring a backup in Amicus Attorney or after archiving/dearchiving your records in Outlook.

We recommend that you first try restarting both applications.

If this does not correct the discrepancies, then we recommend that you run the Re-synchronization utility. This utility will strip all unique identifiers from your records in Outlook and re-assign them. Re-synchronizing your Amicus Attorney and Outlook records can be a lengthy process as all Amicus Attorney Record Keys must be removed and replaced in Outlook.

To re-synchronize Amicus Attorney with Outlook:

1. From the Amicus Attorney Office module, choose OFFICE > Re-synchronize with Outlook. The following dialog appears, warning you that the re-synchronization process may take a considerable amount of time, depending on the number of records that will need to be synchronized. You are also reminded to try restarting both applications as a solution.



Warning: It is strongly recommended that you run the re-synchronization during off-business hours, especially at a firm using an Exchange server.

2. Click Yes to initiate the re-synchronization process.

Other Important Information

- Outlook 2000 and 2002 users should delete Outlook records using the DEL key and not the SHIFT + DEL key command (which deletes records completely, without sending them to the Deleted Items folder).
- If a user creates a Task in Outlook 2000 or 2002 that contains a user-defined keywords field and assigns the Task to another user, the following error message appears when the user to whom the Task Request is assigned attempts to open it: “Can't open this item. Could not complete the operation. One or more parameter values are not valid.” Also, the user cannot delete the Task from his or her Inbox.

  Please note that the Outlook Synchronization process does not involve keyword fields when exchanging Tasks. If this error message appears, then the user creating the Task may have added a user-defined keywords field to the Tasks form themselves.

  For more information, see the Microsoft website:
  Outlook 2000 users:
  http://support.microsoft.com/support/kb/articles/Q241/2/43.ASP

Outlook 2002 users:
http://support.microsoft.com/support/kb/articles/Q291/4/19.ASP

The following information items have been assigned reference numbers.

Item 1015: You can set Amicus Attorney to ignore Appointment reminders by going to Preferences > Calendar > Alarms and clearing the Remind Me about appointments checkbox. While this preference is set, you will not receive reminders in Amicus Attorney. However, this preference affects Amicus Attorney only, and the Remind Me field in new Appointments will not default to "no reminder". In Outlook, you will continue to receive reminders for any appointments that are NOT set to "no reminder".

If you do not want to receive reminders in Outlook, turn them off in Outlook. Go to Tools > Options > Other, click Advanced Options, click Reminder Options, and then clear the "Display the reminder" option.

You may, of course, choose to suppress Appointment reminders in Outlook but keep them in Amicus Attorney.

Item p1376: If you have upgraded your version of Outlook (e.g., 2000 to 2002, or 2000 to 2003) after the installation of Amicus Attorney, you will encounter problems when working with Outlook Synchronization. (For example, you might receive the following error message when attempting to send an e-mail from a Team Member workstation: "Server threw an exception.")

Update Amicus Attorney on your Team Member workstation to ensure that the correct DLL files are installed to match your version of Outlook.

Item p1281: Outlook 2000 and 2002 users should not move large numbers of Contacts, Tasks, or Appointments from one folder to another at one time because then the records will not be synchronized with Amicus Attorney. Similarly, you should not delete large numbers of items at one time because the deletions will not be reflected in Amicus Attorney even if you choose OFFICE > Process Deletions from Outlook.
Microsoft has identified this issue as a problem in Outlook 2000 and 2002. For more information, consult the Microsoft Knowledge Base at:
http://support.microsoft.com/default.aspx?ln=EN-US&pr=kbinfo&#mskb
and search for the appropriate article:

- for Outlook 2000, see article Q249156 - ItemAdd Event Doesn't Fire in Some Scenarios
- for Outlook 2002, see article Q290653 - ItemAdd Event Doesn't Run in Some Scenarios

You can, nevertheless, move a large number of Contacts, Tasks, or Appointments into a folder that is synchronized with Amicus Attorney if you shut down Amicus Attorney before moving the items, and restart it afterward.

Item p1258: *In Amicus Small Firm Amicus Attorney SFE (version 2006) only:* If you have Outlook Synchronization enabled, the synchronization process starts automatically each time you start Amicus Attorney. A dialog appears, stating that "A program is trying to access e-mail addresses that you have stored in Outlook. Do you want to allow this?" Activate the "Allow access for" checkbox. We recommend that you select 10 minutes from the drop-down provided, the maximum allowable time. Then click OK. You may be presented with this dialog more than once while your Contacts, Appointments, and To Do's/Tasks are being synchronized. You must click Yes each time the dialog appears in order to continue the synchronization process. This dialog may also appear later, while you are working in Amicus Attorney or Outlook and have added, modified, or deleted a record.

Item p1251: Internally, Amicus Attorney and Outlook handle exceptions to a repeating To Do differently. For simplicity and reliability, these exceptions are not synchronized between Amicus Attorney and Outlook.

Item p1250: Internally, Amicus Attorney and Outlook handle exceptions to a repeating Appointment differently. For simplicity and reliability, these exceptions are synchronized only from Amicus Attorney to Outlook, not vice versa. If you delete a repeating Appointment in Amicus Attorney, all instances are deleted in both Amicus Attorney and Outlook. However, if you delete a repeating Appointment in Outlook, you will then need to manually delete the exceptions in Amicus Attorney or in Outlook.

Item p1249: If a non-Amicus Attorney user creates Appointment meeting requests or Task requests in Outlook, the recipient Amicus Attorney users who are currently Offline will, when they go Online, get duplicate Appointments or To Do's in Amicus Attorney.

Known Issues

Issue 4497: If using Outlook 2002 (XP) with the real-time preference for automatic Outlook Contacts & Calendar Synchronization selected, closing and restarting Outlook while Amicus Attorney is open causes a run time error to occur.

WORKAROUND: Exit and restart Amicus Attorney.

Issue 1086: In rare cases, a Team Member might not be able to start Amicus Attorney successfully because Outlook Synchronization is failing during the start-up process.

If you are experiencing this problem, please contact Gavel & Gown Technical Support at 1-800-472-2289.

Issue 0997: If another Team Member opens your Office and modifies an Event, and that Event was the last Event you synchronized to Outlook, then when you restart Amicus Attorney, an extra request will be sent to each of the Team Members assigned to that Event.

Issue 0622: If you use Outlook in a POP3 environment and your preferences specify Team Members to be assigned by default to new Events, then in some cases the Team Members may be assigned twice to the Event and two requests are sent in Outlook.

Issue 0277/p1427: If you are synchronizing your Palm OS device with Outlook and you also have Amicus Attorney-Outlook Synchronization enabled, then any new Contacts or To Do's that you create on the Palm OS device will appear in Outlook, but will not be synchronized through Outlook with Amicus Attorney. You may also receive a Run-time “5” error message in Outlook.

WORKAROUND: Synchronize Outlook and Palm without Amicus Attorney running. If you have already synchronized your Palm with Outlook while Amicus Attorney was running, you will need to re-synchronize Amicus Attorney with Outlook. This process may be lengthy.

Issue 0269/p1449: If you assign a Contact to Contact Groups in Amicus Attorney and synchronize with Outlook, the corresponding Outlook Categories appear for that Contact. However, if you alter the corresponding Categories in Outlook (e.g., add or remove a Category), then all the Contact Groups will be removed for that Amicus Attorney Contact.

For further information, contact

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