

LawStream Demo Guide

Welcome...

Welcome to the LawStream Demo Guide. Thank you for downloading and reading this guide. By following the instructions in these notes, you will find it much easier to install LawStream, and much easier to explore its features and learn about how it can help you manage time and money in your office.

The Format of These Notes

Throughout most of the rest of this guide, you will see three columns of text. We've organized the manual into a three-column format, to make it easier for any prospective LawStream user to navigate through these instructions: wherever this guide is structured with three columns, the left column will contain a heading that can make it easy to find things; the middle column will provide, details, and the right column might contain a summary or other information to supplement the detail text.

Headings on the left, details in the middle, summaries or notes on the right

Different Types of Uses, Different Types of Users

Just as there are a variety of ways to perform different tasks in LawStream, these instructions have been prepared in a way that lets different people use them in different ways. The column at the left can be used for scanning through these notes to find paragraphs of interest; this middle column will contain most of the details you will likely need; the right-hand column can be handy for those who prefer to scan through these notes for essential information and helpful tips.

Power users might find it enough, just to scan through the comments in this column

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Simple Methods, and Reliable Methods

Some power-users will find that some of these instructions are detailed to the point of being tedious. Some beginners will find that some of these instructions are detailed to the point of being very helpful. We have chosen to include details whenever there is a possibility that they might be necessary. You might see some instructions that refer to techniques of dragging and dropping icons, and basics about how to copy files from one part of your computer's hard disk to another part. If you already know about such things, you might choose to ignore the details. Keep in mind, though, that in some cases the details might be necessary.

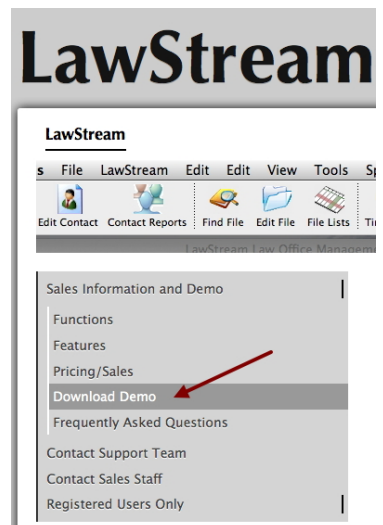
Starting point: the LawStream web site

If you have downloaded these notes, you've likely already found our web site; if you have not yet accessed the web site, you should open your web browser and point it at www.lawstream.com; from there, you will see a column of links at the left side of the main page of that site: the "Sales Information and Demo" link includes a sub-link called "Download Demo": click on that link, to open a page that shows information about LawStream, including a link to let you download a demonstration version of the LawStream package.

These instructions include some images taken from one browser (Safari) and one operating system (Mac OS X). You will find that other browsers, and the Windows Operating System, will look very similar, so you can still use these instructions if you are using a different browser and/or a different type of computer.

Feel free to use shortcuts if you know what you're doing, but be prepared to look here for basics and details, just in case

Point your browser to <http://www.lawstream.com>, and then click on the link "Download Demo" link



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Starting the Download

Clicking on the “Download Demo” link (shown in the image at the right) won’t start the download: it will bring you to another page, which contains a link that **will** start the demo. The reason for that, is that we want to be sure you see all the information and other instructions available on the “real” download page. When you get to that page, you should do two things: click on the link to start the download, and take advantage of the time (during the download), to download and/or read the other information about the download process, and about installing and using the demo. Your link to start the download, will be one of the links listed on that page (depending on the type of computer you are using, and your location). On a fast (e.g., cable or DSL) internet connection, the download may take about ten minutes. On a slower connection, the download could take much longer than that. Your browser most likely has a separate window (which you can display by selecting a menu command), that will show you the progress of the download. The only thing that might require your attention during the download process, will be at the first stage of that process: you might have to tell your browser where to save the downloaded package, and you should make note of where you have told your browser to save the package.

When the download is done, you should see an icon like one of the ones at the right. That icon might not look exactly like these, but you should see a similar icon, called “LawDemoUSAM.zip” or “LawDemoCDNM.zip” or “LawDemoUSAW.zip” or “LawDemoCDNW.zip”. If you can’t find a file that looks like one of those (and if you haven’t remembered where you told your browser to save the file after the download!), you can make your Windows or OS X find a file with that name.

Click on “Download Demo” to open the page to download the demo

Then, click on the link near the top of the “real” download page, to start downloading the demo



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What's in the Download Package

The download package is very large, and it is only one file. Once it has been downloaded, you will see that it is a zipped (archived/compacted) file. It has been zipped, to let people download it more quickly and more easily. The next stage of the download process will change the zipped file into a complete download package, which contains many files: all the files you need, to run LawStream, including a data file with sample data.

The download package is a zipped file, with a size of almost 80MB. The Mac and Windows demo packages are different, but they will perform the same way on the computers for which they were designed.

Having problems with the download?

Some browsers might not recognize the format of the files being downloaded, although it is most likely that your web browser will recognize their format (that's one of the reasons why we have chosen to archive the package in "zipped" format for downloading purposes). If you find that your web browser looks like it is trying to open a very large page full of strange numbers and letters, that might mean your web browser did not recognize the format of the file, and instead thinks the file is a normal web page. In that case, try to right-click (Windows) or control-click (Macintosh) on the download link. When you do that, you should see a drop-down menu (context-sensitive menu), with a number of options, including an option that will let you download the linked file. You can then select that option, to make your browser download the file rather than try to display it as if it were a web page.

If these notes don't answer your questions about problems when downloading the demo, feel free to contact PowerSoft Innovations Corporation for assistance.

What to do when the download is done

Maybe... Your web browser has automatically unzipped (opened) the file that has been downloaded. If it has been unzipped automatically by your web browser, then you can ignore the rest of this section of these notes, and proceed to the next section (check, though, to see if the zipped file is still on your hard disk, as you will want to delete that file to save space on your hard disk, even if your computer has automatically unzipped it).

When the download is done, unzip the downloaded file (if it hasn't already been unzipped) and then delete the zipped file you have downloaded.

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Or, maybe... Your browser only downloaded the file, without unzipping it. If that is the case, you will see a file called LawDemoUSAM.zip (OS X) or LawDemoUSAW.zip (Windows) on the desktop or main download area on your computer, or in the folder or directory where you told your browser to save the downloaded file. In that case, you will have to expand the downloaded file, into a folder (directory) containing all the files in the complete download package. To have that expansion take place, double-click on the zipped file that has been downloaded, and (if prompted for a location) tell your “expansion” software where to save the download package. A good location for the expanded package would be the Applications folder (Mac) or Programs folder (Windows).

Also to do, after the download is done

The download package (when unzipped) will be all you need, to explore LawStream. The zipped file you download, will not be necessary after you have expanded the files from it. You may thus delete that zipped file, to save space on your hard disk, and to avoid confusion with that zipped file in the future. You should also note that once you get a real (“non-demo”) copy of LawStream for your office, you will want to delete the demo files you have downloaded; otherwise, you could find yourself in the midst of confusion between the demo files and the “real” files.

What does the unzipped file look like?

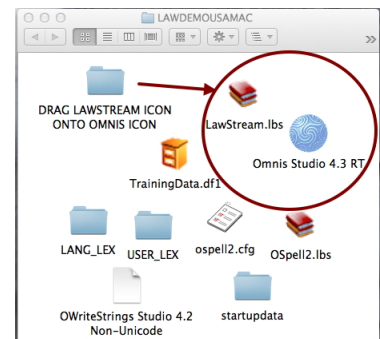
The unzipped file becomes a folder. That folder may look slightly different on different computers, but you can expect it to appear similar to the image shown at the right. You will see that the folder is called LAWDEMOUSAMAC in this case (other versions of the demo might have slightly different folder names).

A successful unzipping in Windows will require “Zipit” or other software that can “unzip” files.

A successful unzipping in Macintosh will require OS X version 10.4.8 or newer.

Successful use of the demo version of LawStream will require that you remember where you’ve told the unzipping software where to save the unzipped package!

Unless you want to start fresh with the download package later, or distribute a copy of the download package to others in your office, you should delete the zipped file you have downloaded.



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What's in the demo package?

The contents of the LawStream demo package are very similar to the contents of the “real” package.

On Mac OS X, you will see that the downloaded and expanded demo package appears to contain only six or seven files, similar to the image shown at the right. On Windows, you will see that the downloaded and expanded demo package contains a large number of files. In reality, there are about the same number of files in each of those two packages: it's just that many of the files in the Mac version are hidden inside an OS X “package” within the Omnis Runtime icon/file. Even though there are about 1,000 files in the complete demo package you have downloaded and expanded, only three of those files will require your attention.

Don't worry about any other files, except:

- LawStream (or LawStream.lbs)
- Omnis (or Omnis.exe, or Omnis.app, or Omnis Studio, or Omnis 4.2 Runtime), and
- TrainingData (or TrainingData.dfl).

The three-letter extensions (or, two letters and a number, in the case of TrainingData) must appear in Windows, but are optional in Mac OS X.

What do each of those three essential files do?

LawStream is the program library (application) designed and developed by Powersoft Innovations Corporation: it contains all instructions, formats and other details that make the program work for you, as a law office management tool. Omnis Studio (a.k.a. Omnis Runtime) is a database engine that “drives” our LawStream program library. The file called TrainingData contains some demo data we have created, so you can see information without having to spend the time entering it on your own. That TrainingData file also contains documents created with LawStream's word processor, containing the LawStream manual.

There are about 1,000 files altogether in the demo package. Of those files, you need to be concerned with only a few. The essential files (for the purpose of using the demo, and making LawStream work) are the ones shown here: LawStream.lbs, Omnis Studio (an executable in Windows, or an application in Mac OS X), and TrainingData.dfl)

LawStream is the program library. Omnis Studio (a.k.a. Omnis Runtime) is a data base engine. TrainingData is the data file.

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Aliases, shortcuts, toolbars, and other neat tricks

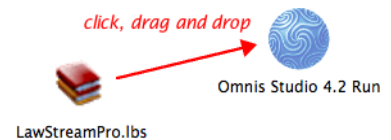
At this initial stage of installing and exploring the LawStream demo, you might be tempted to create aliases, shortcuts, or other tools and techniques that might make it easier for you to access and use the LawStream demo. LawStream works well with those sorts of techniques, and you may very well want to implement them, once you get your own copy of LawStream in your own office, for normal use. For now, though, we recommend that you keep things simple, and focus on learning about the functions and features in LawStream. Your goal should be to become as familiar as possible, with the things LawStream can do, and how you can make it do those things.

Treat your exploration of the demo, as a time to explore the demo: wait until later, to try tricks and shortcuts that might be useful when you are a LawStream power-user.

Starting the demo version of LawStream

Once you are familiar with what LawStream can do, and once procedures are settled in your office with files in their proper places (and people who know where those files are), you might find other ways to start LawStream. For now, we recommend that you ***start LawStream by dragging the LawStream.lbs icon onto the Omnis icon.***

To start LawStream, just drag the LawStream.lbs icon onto the Omnis icon:



Did you notice that those are the only italicized, bold and larger-font-sized words in this manual?

Problems starting the demo?

We have tried to provide enough details in these notes, to cover most of the possible problems that could arise when you first try to download, install and use the LawStream demo package. If you still encounter problems, the first thing to do, is to re-read all these instructions, very carefully: there is a good chance that any problem you find, has already been discussed in these instructions.

Using FileVault for Mac OS X? If you are, you might have problems. If FileVault preferences are set to protect a folder containing the LawStream package, you might have to move the LawStream package to another (unprotected) location.

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Possible solutions to problems starting the demo

If you are sure these notes do not deal with the problem you have encountered, try the following:

- download the package again, just in case there was some corruption that occurred during the download process;
- try the demo on another computer, to find out if the problem is unique to the computer where you have been trying it;
- check permissions (look at “get info” for the folder, on a Macintosh), and be sure the entire demo folder and all its contents have been set to allow read-write access to all types of users.

Linking the Files

Most computer programs involve an application that can open and modify and save a data file; for example, Microsoft Word can open and save a letter or agreement, and your email program can open and save your email messages.

The Omnis Runtime is linked to the LawStream.lbs file, and the LawStream.lbs file is linked to the TrainingData file.

LawStream’s arrangement differs slightly from that arrangement, as there are three levels of files instead of the two. Rather than having a single program open a single data file, LawStream relies on Omnis Studio: Omnis “runs” the LawStream program, and LawStream runs the data file (in this case, the TrainingData file).

LawStream knows about Omnis, so those two files (the Omnis Runtime knows how to run the LawStream file, and LawStream knows that Omnis is the program that runs it).

The first time you start LawStream (by using the method of dragging the LawStream icon onto the Omnis icon, as recommended earlier), those two programs will not know where the TrainingData file is located. After you tell LawStream where that data file is, LawStream will remember the name and location of that data file, so you will then not have to bother finding that data file.

The first time you start Omnis and LawStream, you will have to locate the TrainingData file; after that, LawStream will remember the name and location of that file, so you will not have to locate that file each time you start the

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LawStream Program.

Finding the TrainingData data file

Most computer programs involve an application that can open and modify and save a data file; for example, Microsoft Word can open and save a letter or agreement, and your email program can open and save your email messages.

Find the training data file, the same way you would find any other file: navigate through the standard "find file" dialog, and locate the "TrainingData" file inside the "LAWSTREAM MAC (or WIN) DEMO" folder.

LawStream's arrangement differs slightly, from that arrangement, as there are three levels of files instead of the two. Rather than having a single program open a single data file, LawStream relies on Omnis Studio: Omnis "runs" the LawStream program, and LawStream runs the data file (in this case, the TrainingData file).

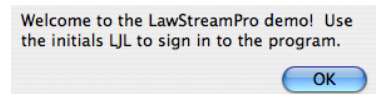
LawStream knows about Omnis, so those two files (the Omnis Runtime knows how to run the LawStream file, and LawStream knows that Omnis is the program that runs it).

Working with LawStream once it has started

Welcome to LawStream

When you start the LawStream demo program with the TrainingData data file, you will see two dialog windows. The first of those two dialog windows will note that you are using an evaluation version of the software, and that it will expire on a certain date (typically, a date within two months of the current date). The second of the two dialog windows will advise about the user-initials you will have to use, to sign-in to the data file.

Click OK to the opening dialog window, including this one:



Resources for Help

Once you click each of those two OK on those dialog windows, you will be able to start using LawStream, and you will be able to take advantage of other resources to help you learn the most you can about LawStream. Those resources are very important, and we strongly recommend that you take advantage of them.

You will learn a lot more about LawStream, a lot more quickly, if you take advantage of the help resources..

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Sign in

Click the OK pushbutton (or press the Enter key), to make LawStream accept your initials, and make the program show the various options available for law office management.

To sign in with the default user-initials (LJL), just click the OK button.



Options available after signing in

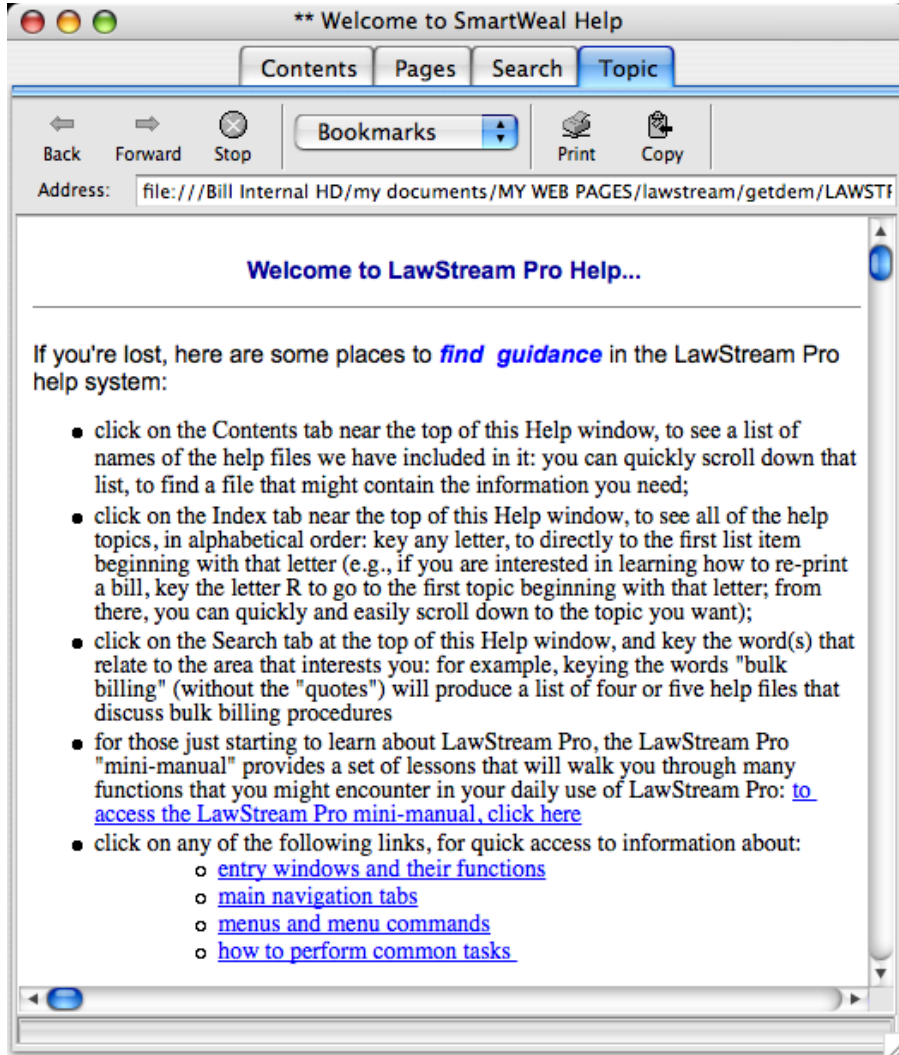
After signing-in to LawStream, you can choose from dozens of entry windows, and hundreds of different reports, relating to several important types of data. We recommend that at the start, you take things slowly, and try one function at a time. We also recommend that you take a look at the help resources available. Along with the many specific reports and entry windows available in LawStream, you can also try these:

- you can (should!) select the Help command from the LawStream menu, to become familiar with the information available from the built-in help files in LawStream:

After signing-in, you can start entering and viewing data in the data file, or you can use the various help resources to make it easier for you to use LawStream effectively.

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Want to try an entry or two?

We really do recommend that you take the time to explore the resources in the help system and other resources. If you are anxious to try an entry or two, or to produce some reports, you can see some samples in the following pages.

The LawStream help window will open with a main "Topic" page shown. The links from that page include a link to a very important (and very helpful) document called the "LawStream Mini-Manual". That Mini-Manual is part of the built-in help system: it includes a guide that will walk you through some basic functions from adding a contact, through opening a file and entering time records, to billing and receiving payment, and closing a file.

Along with that very important and very helpful mini-manual, you should also find out how the help system can show you detailed contents, separate pages in the help system, and a search window that can find topics you specify.

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Sample entry: adding a contact

To add a contact to your LawStream data file, you have to open the Client/Contact entry window. You can open that window with a menu command (the “Client/Contact Entry” command in the “Contacts/Files” menu), or a keyboard shortcut (command-minus). That window looks like the one shown below:

To add a contact, select “Client/Contact Entry” from the “Contacts/Files” menu, and then click on the “New Contact” pushbutton.

The screenshot shows the 'Client/Name Entry' window with the 'Identity' tab selected. The main area contains several input fields: 'Name' (highlighted in green), 'Code' (highlighted in green), 'Familiar name' (highlighted in yellow), and a 'Create Familiar Name' button. Below these are sections for 'Optional Corporate/Institution/Business Information' and 'Optional Name Details'. The 'User-Defined Custom Contact Categories' section has checkboxes for 'Active' and 'Clients' checked. The bottom toolbar includes buttons for 'Reports (incl. Labels and Conflicts)', 'Manage Groups', 'Find', 'Edit', 'Delete', 'New Contact', 'New File for This Client', 'Cancel', and 'OK'.

Once that window appears, click on the “New Contact” pushbutton, and key a name into the name field in the main “Identity” area of the Client/Name entry window. There are plenty of fields that can contain plenty of types of data, but you can limit your initial exploration of this window, to the name, code, and (if you wish) the address. If you enter a phone number, note that those numbers must be numeric (no spaces, commas or other punctuation). When you have entered the data for the contact, press Enter on your keyboard to save that information.

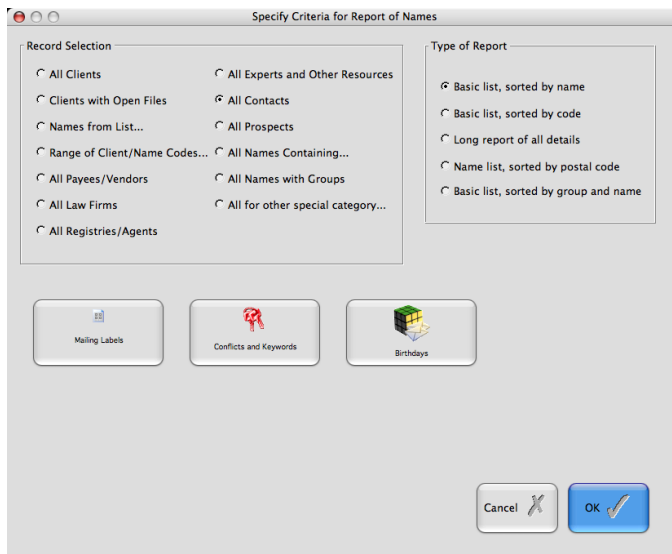
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Where is the contact record you just entered?

If the contact entry window is not shown on your screen, you can open it by using the same menu command (or corresponding keyboard shortcut). Once that window is visible, you can use the command-N keyboard shortcut to “next” through all the contacts in the data base, to find the one you entered. Many contact reports are also available. To see a report that contains the contact you just entered, click the “Reports” pushbutton at the bottom left corner of the Client/Contact entry window, to display the window for selecting contact reports. That window will look like the following image.

As soon as you have entered the new contact, it can be found in the client/contact window, or displayed in reports of contacts.



Select “All Contacts” for the record selection, and “Basic List, sorted by name” as the type of report, and then click the OK pushbutton to produce a report that will include the contact you have added.

Want to do more?

There is so much more you can do in LawStream. We recommend that you look carefully at the guided tour available in the Help system: you can look at the information in that tour, by reading individual pages, or you can print the pages or sections you want to use, and follow them while you are exploring LawStream. Remember, too, that there are other resources available that can help you get the most from LawStream.