

ATTORNEY BOOK PLUS MANUAL

Disseminate documents to your clients through a secure web delivery system. Documents are distributed efficiently with a minimum of effort and time. Multiple authorized people upload authorized documents to the secure site with the provided PDF Upload tool. Once Attorney Book Plus Information has been used for system set up, subsequent documents require only subsequent uploads. Clients and Attorneys can use any Internet browser to access information.

Additionally, Attorney Book Plus automatically sends a notice when documents are accessed that includes who accessed what documents. This detailed notification allows you to effectively manage your client communications.

DESIGNING YOUR ATTORNEY BOOK PLUS

Create a list of the people who will be using your system and clients those users may see. You will ultimately need to have each user's name and email address. A sample user table follows:

User	Email Address	Client(s)
Mary Miller	mmiller@here.com	Mary Miller
John Doe	Jdoe@work.com	XYX Corporation
Abby Anderson	aa@hotmail.com	Abby Anderson ABC Company

USING ATTORNEY BOOK PLUS INFORMATION TO ENTER YOUR DESIGN

To use Attorney Book Plus Information, the Administrator should access the internet and go to http://www.YourWebAdvisor.com/????_a.php (you will provide us with the name and email address of your employee who will act as Administrator of the system and we will provide you with the letters to insert for the question marks.) Choose the link to access Attorney Book Plus Information. Login to the system using your e-mail address and a password of your choice. Note that your choice of password may have some restrictions, listed on the left-hand side, such as the length of the password and whether any capital letters are required. The first time you login, you will need to repeat the password. You can check the Remember Me box if you choose. This will allow you to login without having to enter your password each time but will also allow others with

physical access to you computer to use your account. Continue to use this email address for all changes in Attorney Book Plus Information. Your e-mail address and password will also allow you use your Attorney Book Plus System.

Once you login select your Attorney Book Plus System by highlighting it and clicking the Open button. This will get you into the system and allow you to customize your Attorney Book Plus System.

There are five areas in Attorney Book Plus Information.

- Documents
- Table Of Contents
- Users
- Clients
- System Information

The Document and Table Of Contents sections have been completed and cannot be changed. Go to:

http://www.yourwebadvisor.com/sponsors/yourwebadvisor/attorney_book_plus_documents.pdf

to see the names of documents and where they are located in the Table Of Contents.

The Changes to Make in Attorney Book Plus screen allows you to work in the Users, Clients and System Information sections.

On each screen there is a Back button that will allow you to return to any screen and change your entry, a Next button to go to the next screen, a First Page button which will send you to the first page you saw when entering Attorney Book Plus Information and a Last Page button which will send you through the remaining pages as if you selected Next on each page without making any additional changes.

Attorney Book Plus Information confirms that you have made changes to your Attorney Book System. Attorney Book Plus Information will automatically update the website with the changes that you have made.

Each of the major areas is handled in its own section below. When you are establishing a new Attorney Book Plus System, it is suggested that you visit each section in the order shown in this manual.

Change Information in Users

The Users area contains information about all of the people authorized to use your system. Select Modify User Information and click on Next. You can add, change, delete or move Users. Originally, change the existing Users so they are correct and then add

additional users as needed.

Note that in the Users section the first line for a User is their actual name. The second line of the User screen is their e-mail address. When you are finished adding and modifying Users select You Are Finished and the Next button until the system finishes.

To continue initializing your Attorney Book Plus, select the Back to System button.

Change Information in System Information

The System Information area holds:

- Name of your system
- Name of the User (Administrator) who is entitled to change information for the system
- Users who may upload documents

Once set up, this area is rarely changed. Change the name of the system to “<*your company name*> Attorney Book Plus” where you substitute your actual company name for italicized text.

Your e-mail address should be listed in the Who May Change Information line. If not, change it to your e-mail address. Click on Next.

You can add, change, delete or move Users who may upload documents to your Attorney Book Plus System. Select those Users who may upload from your list of Users. When you are finished adding and modifying Users Who May Upload select You Are Finished and the Next button until the system finishes.

To continue initializing your Attorney Book Plus, select the Back to System button.

Change Information in Client Information

The Client Information area holds:

- Name of client
- Users who may view client’s documents

You can add, change, delete or move Clients and you can add, delete or move Users who may view documents for that Client. Select the Users who may view documents from your list of Users. When you are finished adding and modifying Clients and Users Who May View Documents select You Are Finished and the Next button until the system finishes.

Printing System Information

When you have made all of the changes mentioned above, select Print System Information to print the current information in the Users and System sections. If any changes need to be made, or when additions or changes need to be made in the future, reenter Attorney Book Plus Information and make those changes

PREPARING COMPUTERS TO UPLOAD PDF FILES

Attorneys can download documents using a normal internet browser. However, each computer that will be uploading PDF files to the Attorney Book Plus needs to have the Upload Tool Program installed. To do that you go to:

<http://www.yourwebadvisor.com/demo5.php>

Click on the link at the bottom to download the Upload Tool. Once you have downloaded the setup file, double click on it to install the Upload Tool on a computer.

When you first run the Upload Tool, you will be prompted for your link ID. You are given a link ID when you license the System. The format of this link ID should be: ??? _ww10.

Once the Upload Tool is installed, you run it by entering your e-mail address and password on the login screen. You are given the option to save the login information to avoid having to repeatedly enter it. For maximum security, leave that box unchecked.

If you are an authorized uploader a screen will come up which allows you to upload to your system. If you are not an authorized uploader, check the New screen for the name of the contact person of your Attorney Book Plus System. Ask them to designate you as a authorized uploader.

At the upload screen, select the project for which you will be uploading PDF documents. Having selected that you drag from your computer usually either the desktop or a folder on the desktop containing those PDF's you want to upload and put them down in the box at the bottom of the screen. When you do that both a PDF symbol and the text should be in black showing that the document is recognized by your System. It will be in red if the PDF that you have put in the box below is not recognized by your System. If you have any documents that are red, highlight those documents and click on the Remove button to remove them from what is being uploaded. Contact the administrator of your Attorney Book Plus to determine why there was a problem with a PDF. Usually, you need to change the file name or that file is not expected by the System and needs to be corrected before it may be uploaded.

Once you have all of the PDF documents that you want to upload in the lower box and they are all in black text, click on the Upload button and those documents will be uploaded to your Attorney Book Plus site.

If documents have been incorrectly uploaded to a given Client, click on the Delete button to see all of the documents which have been uploaded. Select those documents you wish to delete and click on the Delete button. They will be removed from the website and no longer be available for that Client in your Attorney Book Plus. If an update to a document has been uploaded to the System you do not have to delete it as a subsequent upload will override the existing one. All documents that are uploaded are automatically encrypted using your encryption key to provide for absolute security of the data contained in those documents. When you are done, click on the Exit button.