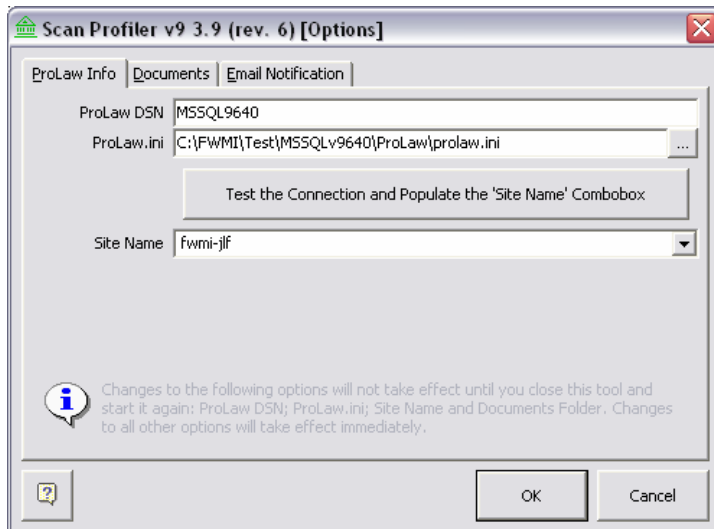**The FWMI Scan Profiler for ProLaw**

Scan Profiler for ProLaw v9.x
version 3.9 (rev. 6)

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The court house design and the court house and diskette design are trademarks or service marks of Fritchman Winter Management, Inc. "ProLaw" is a trademark or registered trademark of Thomson Elite.
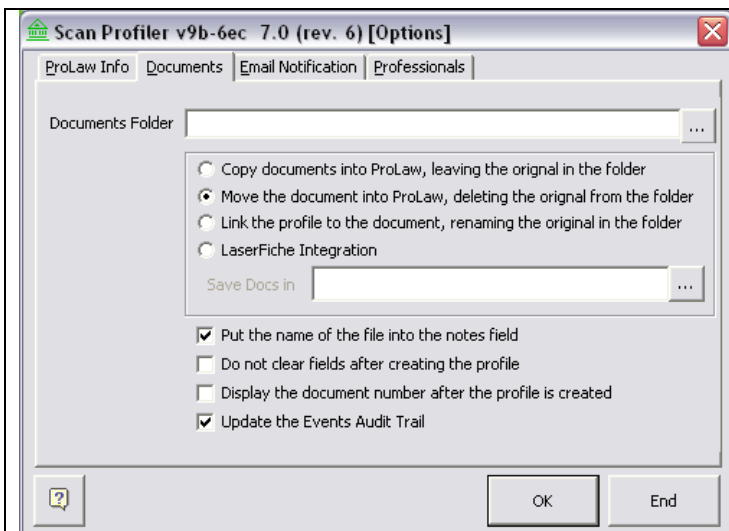
WARNING: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties and will be prosecuted to the maximum extent possible under the law.

Fritchman Winter Management, Inc.'s Scan Profiler will profile any document or image into your ProLaw database. Whether you scan to a network folder or to a folder on your workstation, the FWMI Scan Profiler can profile your images directly into your ProLaw database. This includes profiling directly to Closed Matters.

This tool is compatible with supported versions of ProLaw, v9.2 and above (including v11 and XII).

We set up an ODBC connection to your database, and point to your prolaw.ini file so that matter specific information can be validated at the time of profiling. We make sure that the tool looks to the server (Site) that houses your ProLaw database. This information is stored in your workstation's registry so that you do not have to re-enter the information every time the Scan Profiler is launched.

Scan Profiler v9b-6ec 7.0 (rev. 6) [Options]

ProLaw Info | **Documents** | Email Notification | Professionals

Documents Folder [   ] [...]

○ Copy documents into ProLaw, leaving the orignal in the folder
● Move the document into ProLaw, deleting the orignal from the folder
○ Link the profile to the document, renaming the original in the folder
○ LaserFiche Integration

Save Docs in [   ] [...]

☑ Put the name of the file into the notes field
☐ Do not clear fields after creating the profile
☐ Display the document number after the profile is created
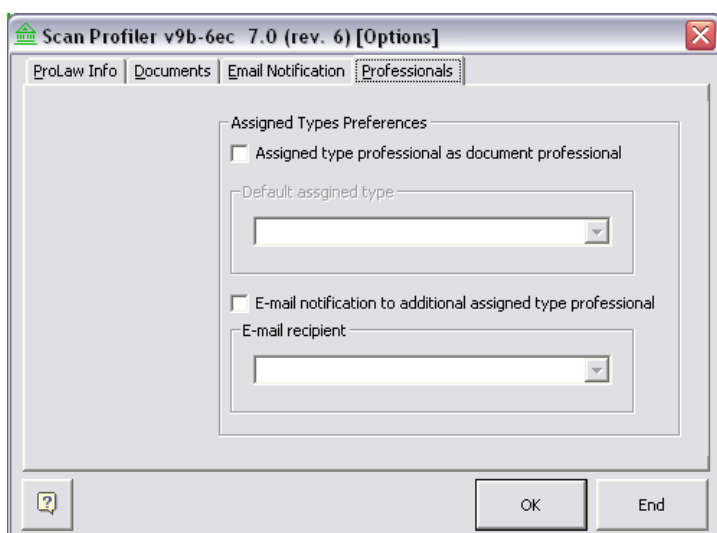☑ Update the Events Audit Trail

[OK] [End]

The Documents tab allows you to choose which folder you want to profile from. Most often, you will want to move the document into ProLaw, deleting the original from the folder. The LaserFiche Integration profiles documents into ProLaw AND copies the file to your LaserFiche location giving the image the ProLaw Document Number. Other options change the way the tool behaves.

Scan Profiler v9b-6ec 7.0 (rev. 6) [Options]

ProLaw Info | Documents | **Email Notification** | Professionals

☐ Send an email message to the professional when a document is profiled

Subject Line [Scan Profiler v9b-6ec : Notification of Profiled Document]

Message Body
```
This message is to notify you that
{User:Name} has profiled the following
document and you have been made the "author"
of the document. A copy of the document is
```
[...]

☑ Attach the document to the message

Email Source Name [Scan Profiler]
Email Source Address [   ]
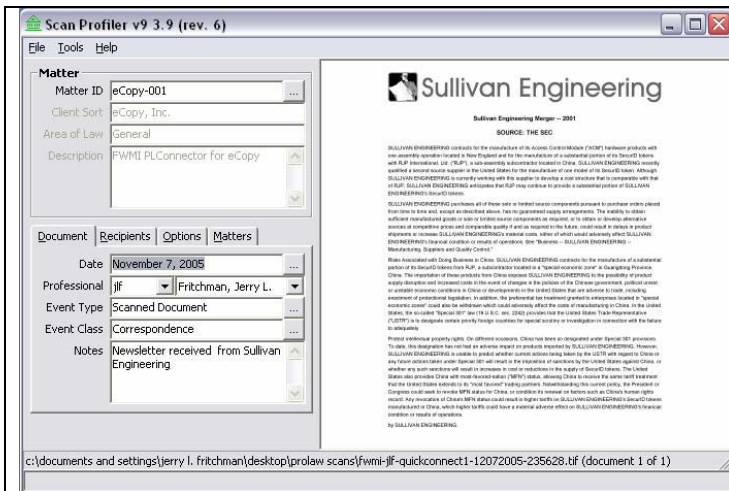SMTP Server [   ]

[OK] [End]

The Email Notification tab allows you the option of sending an email to someone informing them that a document or image has been profiled into ProLaw. You have the option of changing the message body.

The Email ID field from your ProLaw Professionals records in ProLaw will need to be populated. The tool bounces messages off of your SMTP Server to the Professional designated as the owner of the profiled document.

Scan Profiler v9b-6ec 7.0 (rev. 6) [Options]

ProLaw Info | Documents | Email Notification | **Professionals**

Assigned Types Preferences
☐ Assigned type professional as document professional

Default assgined type
[▼]

☐ E-mail notification to additional assigned type professional
E-mail recipient
[▼]

[OK] [End]

The Professionals tab allows you to designate an Assigned Type professional as the profiled document professional. For email purposes, the designated Assigned Type will be read from the Matter and an email will be sent to the professional(s) with that Assigned Type.

You may also designate one additional Assigned Type to receive email notification.
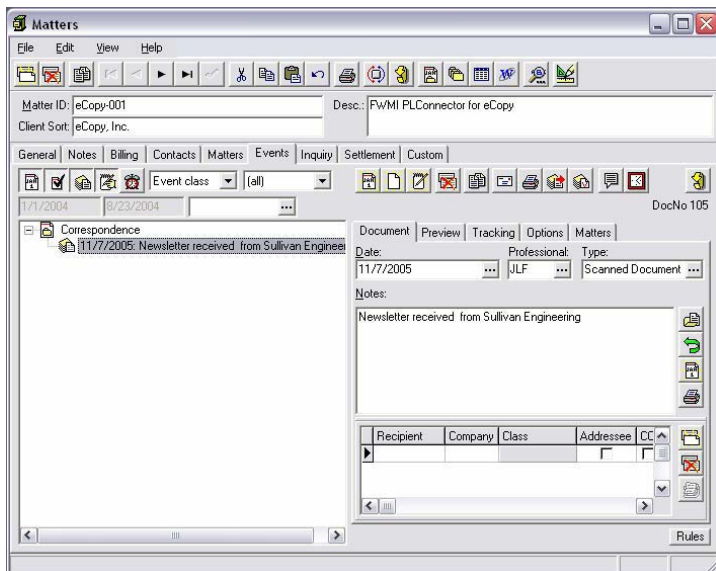
Once you have set your Scan Profiler preferences, the first item in your profiling folder is displayed in the right side of the profiler screen. ProLaw information is validated in the left side of the profiler screen. If you do not know your Matter ID, then click the ellipsis to poll your database. Here, you can search by Client Sort, Matter Description, or any other method to find the correct matter.

The professional initials and name become the recipient of email notification if you have set that preference in your Scan Profiler. The Event Type and Event Class ellipses also poll the database. If an Event Class has been defaulted to a particular Document Type in ProLaw, then that field will populate for you. The Notes field will default to either the Event Type name (Document Type) or the file name, but you can change or add to the notes which also display in ProLaw. The Recipients, Options and Matters tabs mirror those found in ProLaw. The next Pleading Index Number will populate if you have a Pleading Index assigned to that matter in ProLaw. The Matters tab will populate with the Event Buddy Matter if you have that set up on the matter in ProLaw.

Your scanned image is now visible and accessible via the Events Tab in Matters.

Yes, you CAN profile to a Closed Matter.

Fritchman Winter Management, Inc. is a provider of training, support and customization and integration tools for ProLaw® Software. We are Certified Thomson Reuters ProLaw Partners and have undergone extensive training in all versions of ProLaw. For more information about Fritchman Winter Management, Inc., please visit our web site at www.fritchmanwinter.com.

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