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## PRACTICE INFORMATION POWERTOOL (PIP) 2018

### GETTING STARTED GUIDE

Thank you for taking the opportunity to download the PIP 2018, the ultimate integration of Case Management, Email, Calendaring, Task Management, Form Generation, Time and Billing, and Document Management for Law Firms.

This guide will provide you with the information you need to get started using the PIP 2018 system. The entire purpose of the PIP 2018 is to help you save time in managing your practice. With that in mind, we have kept this guide as brief as possible (4 pages). We want you to be able to learn while using the features of the PIP 2018.

Have fun getting started! And please feel free to call us or send us an email if you have any questions.

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Anytime a reference is made to “click” with the mouse, we mean to click with the Left mouse button. However, there are instances when you need to click with the Right mouse button, and those will be indicated specifically by reference to the **Right** button.

### 1. NAVIGATION (Module Navigation Menu)

At the top of the screen you will find the Module Navigation Menu (Nav Menu) (**Fig. 1**). The Nav Menu is broken down into modules that represent different categories of data which are related by their function type. The Nav Menu is positioned at the top of the screen and has 7 Modules, each of which has one or more sub-Tabs in which you will find different types of information related to the specific Module.



**Fig. 1 - Module Navigation Menu**

To use the Nav Menu, simply click on the image or name of the module with your mouse. You will note that the Module Name will become **bold** when it has been selected. For example, the **Cases** Module is selected in **Fig. 1** above.

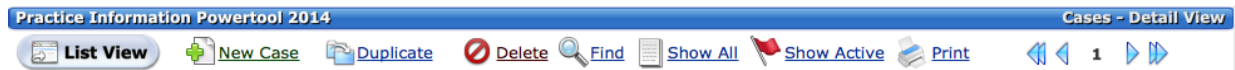
The outline below provides a complete list of Modules and the list of sections contained therein, followed by a short description of what you will find in each of the sections.

1. Cases
  - a. List View (List View of Cases)
  - b. Detail View (Detail View of Cases)
    - i. Parties (Assign Contacts to a Case and Designate their Role in the Case)
    - ii. Calendar (Case specific Calendar)
    - iii. Assignments (Task Management)
    - iv. Case Detail (Fields change based upon Case Type and can be customized)
    - v. Evidence (Enter and track Evidence)
      1. Facts (Includes Fact Summary Report with Timeline)
      2. Witnesses (Percipient)
      3. Experts (Store Specialty, Billable Rates, and Testimony)
    - vi. Insurance (Coverage Information)
    - vii. Damages (Track Special Damages)
      1. Property Damage (and Repair Information)
      2. Lost Wages
      3. Medical Reports
      4. Medical Bills
      5. Med Worksheet
    - viii. Costs
    - ix. Settlement
      1. Pre-Settlement
      2. Breakdown (Case Settlement Breakdown Worksheet)
    - x. Discovery
      1. Depositions
      2. Disc. to Client (Interrogatories, Request for Admissions, etc.)
      3. Disc. to Adversary (Interrogatories, Request for Admissions, etc.)
2. Contacts
  - a. List View (List View of Contacts)
  - b. Detail View (Detail View of Contacts)
    - i. Contact Info (Address, Telephone, Fax, Email etc.)
    - ii. Calendar (Calendar related to a specific Contact)
    - iii. Personal (Identifying information: Date of Birth, Driver's License, etc.)
      1. Education
      2. Criminal (Arrest/Conviction record)
      3. General Notes
    - iv. Matters (List of Cases in which Contact involved with Role Designation)
    - v. Type Info (Used for tracking information about certain types of Contacts)
      1. Court Information
      2. Expert Information
      3. Prospect Information
    - vi. Relationships (Used to define Contact relationships: ex. Father/Son)
    - vii. Notes (Specific to particular Contact)
    - viii. Client Ledger (Client Trust Accounting)
3. Documentation
  - a. Case Notes
  - b. Related Documents (Document Management System)
  - c. Tracked Documents (Documents that require a response from a Party)
  - d. Emails (Full Email Integration; Assign Emails to Cases and Share with Staff)
4. Calendar (Stores all Calendar Events for All Cases)
  - a. Day
  - b. Week
  - c. Month

- d. Pop-up Warnings (Control Panel for Pop-up Warning System)
  - e. RBC Templates (Template Manager for Rules Based Calendaring system)
5. Forms (Form Generator)
6. Time & Billing
- a. Calendar Items (Convert Calendar Events into Billing Slips)
  - b. Note Items (Convert Case Notes into Billing Slips)
  - c. Cost Items (Convert Cost Items into Billing Slips)
  - d. Email Items (Convert Email Items into Billing Slips)
  - e. Billing Slips (Manually Add/Edit Billing Slips)
  - f. Invoices (Create Invoices and populate with Billing Slips)
  - g. Payments (Record and apply Payments to Invoices)
  - h. Reports (Reports used to review Billing Slips)
7. Preferences
- a. Staff Info
  - b. Firm Info
    - i. Registration
  - c. Default Settings
  - d. Value Lists
    - i. Case Sub Folder
    - ii. Document Category
    - iii. Merge Code
    - iv. Task List
  - e. Folder Paths
  - f. Doc Templates (Document Template Manager)
  - g. Account Journal

## 2. UTILITY TOOL BAR (Add, Delete, Find, Print, and other special functions)

The Utility Tool Bar (**Fig. 2**) is available in all of the modules described in Section 1 above. The functions in the Utility Tool Bar are all related to the specific module being viewed. For example, the “**New**” function will create a record for a new case if the **Case** module (List or Detail Tab) is currently being viewed.



**Fig. 2 - Utility Tool Bar**

Please find below a short description of these functions contained in the Utility Tool Bar:

**New** - Creates a new record in the module currently being viewed. (NOTE: In the Calendar module, the New function will create a Calendar event that is unrelated to a Case or a Contact)

**Delete** - Deletes a record in the module currently being viewed. Before a record is deleted, the system will prompt you to confirm the deletion.

**Find** - Enters the “Find” mode to allow you to search for specific records based upon the criteria (ie., text, date, number...) entered into a specific field. To complete your search, simply hit the “Enter” key. For more information on the “Find” mode, please see the document entitled “FMHelpFindingRecords.pdf” in the “Downloads” section of our website at [www.hipersoft.com/support/downloads](http://www.hipersoft.com/support/downloads).

**Show All** - Displays a list of all records in the module currently being viewed. (NOTE: Navigates to the List view if you are currently viewing the Detail view)

**Print** - Displays a view of the data in the module/tab currently being viewed which is suitable for printing. When presented with this view, it is accompanied by a Print Palette (Fig. 3). The Print Palette has the following functions: **Scroll Up**, **Scroll Down**, **Zoom In**, **Zoom Out**, **Page Setup** (presents the Print Setup dialog box in Windows or Mac), **Print** (presents the Print dialog box in Windows or Mac), **Save as PDF** (generates a PDF file of the document on the Desktop of your computer; the file is automatically named, and you are notified of the name through a custom dialog box; NOTE: the PDF function is not available in the Runtime version of the PIP 2018, but Mac users will find this option in the Mac OS Print dialog box), **Cancel** (exit the Print Palette).



Please note that the Utility Tool Bar has a set of **record navigation arrows**. The **single arrows** will go to the previous record (left arrow) or next record (right arrow). The **double arrows** will go to the first record (double left arrow) or last record (double right arrow). In the **Calendar** module, the arrows navigate as follows:

- Day View - Not Applicable (use the Calendar “Navigator” buttons to navigate)
- Week View - single arrows (last/next Week) double arrows (last/next Month)
- Month View - single arrows (last/next Month) double arrows (last/next Year)

**Fig 3 - Print Palette**

### 3. ICONS AND SYMBOLS (Commonly used throughout the program)

A selection of icons and symbols are used throughout the PIP 2018 program. Most of them are self-identifying, but we wanted to give you an authoritative list here to minimize your learning curve. Once you can identify the following icons and symbols, you should be able to utilize all of the features of the PIP 2018 system.

	View Detail - This icon appears in Billings/Statements and Billings/Payments and displays a separate window showing the detail of “Payments Applied to Statements” and “Statements to Which Payment Applied”.
	Apply Payment - This icon appears in Billings/Payments and displays a separate window to allow the application of a Payment to a Statement.
<b>Timer:</b>	Timer Function – Located in the Documentation Module/Case Notes tab. Clicking on the word “Timer” will provide access to the Timer Log. Also, clicking on the “dot” image to the right will Start/Stop the Timer function. Please see the Tutorial Video entitled “Documenting Cases with File Notes” for detailed information on the use of the “Timer”.
	Update List – Click on this icon to update the list of documents in the Documentation Module/Related Documents tab. For more information, please see the Tutorial Video entitled “Document Management System”.

### 4. TOOLTIPS (Interactive Help System)

**Tooltips:** Please note that when you hold your mouse pointer over **icons**, **buttons**, **fields**, **tabs**, and **checkboxes**, a small yellow box will appear for a few seconds which contains text that describes the function that is available by clicking on that object.