



# Amicus Link Guide: Dropbox

## Applies to: Amicus Attorney

*View Dropbox-hosted documents from Amicus, in the main Documents list or from the particular Files they're related to.*

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## About the Link

Dropbox is a file hosting service that allows users to synchronize a special folder stored on each of their computers. It also provides access to the folder through the Dropbox website and mobile phone apps.

The Amicus Dropbox Link provides access from Amicus to Dropbox documents related to Amicus Files. These documents are maintained in the Dropbox account used by the firm.

- Firm Members can open Dropbox-hosted documents from Amicus, regardless of whether they have a Dropbox account. The documents are included in title/summary searches, and even full-text searches.
- Users who have a Dropbox account that includes access to the appropriate subfolders can add and edit these documents within Dropbox.
- When the Dropbox link is configured in Amicus Attorney only a single Dropbox account is connected. Afterwards, the firm administrator leverages Dropbox sharing capabilities to ensure firm members can view the desired information outside of Amicus.



**NOTE:** Individual firm members are not able to enter their own Dropbox credentials into Amicus. For more information, see [www.dropbox.com](http://www.dropbox.com).

## What you need

The Dropbox Link requires:

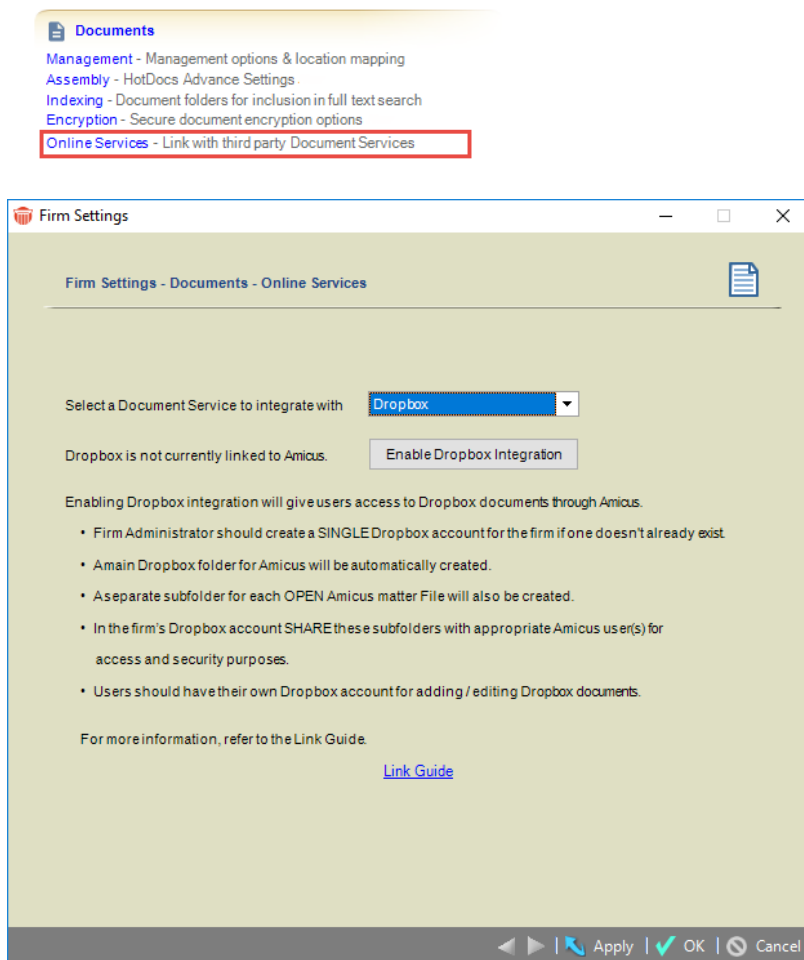
- On the workstations of users who wish to *view* Dropbox documents from Amicus:
  - **Amicus Attorney** Workstation, or **Amicus Anywhere** access
  - Internet access
- For users who wish to *add and edit* Dropbox documents:
  - **Dropbox account**, with access to the appropriate “Amicus” folders created in the firm’s Dropbox account
  - Internet access when synchronizing
- Amicus Indexing Service enabled for the firm, to support full-text searching of Dropbox documents (Microsoft Indexing Service does not support that feature)



**NOTE:** The Dropbox Link and Worldox Link cannot both be enabled at your firm.

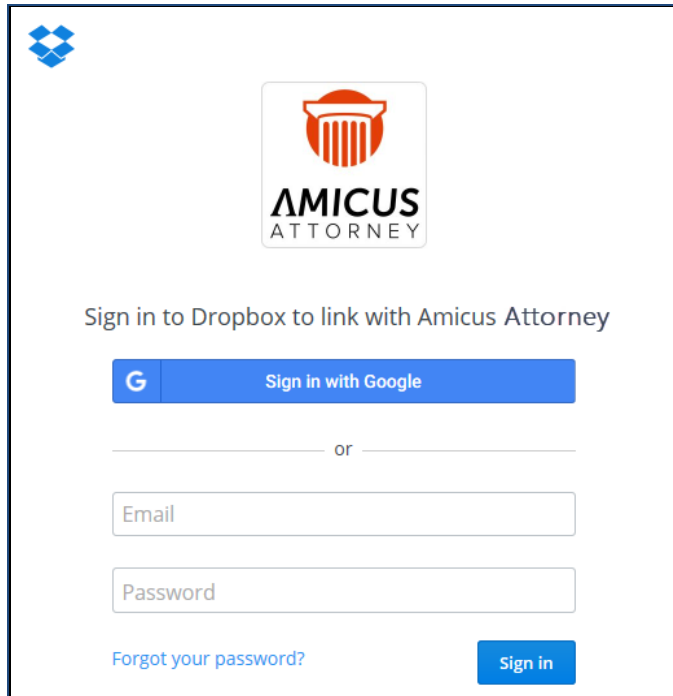
# Enabling the Link

- 1 As an Amicus Administrator at an Amicus Workstation with Internet access, go to the Office module, choose Firm Settings, and click Documents - Online Services.

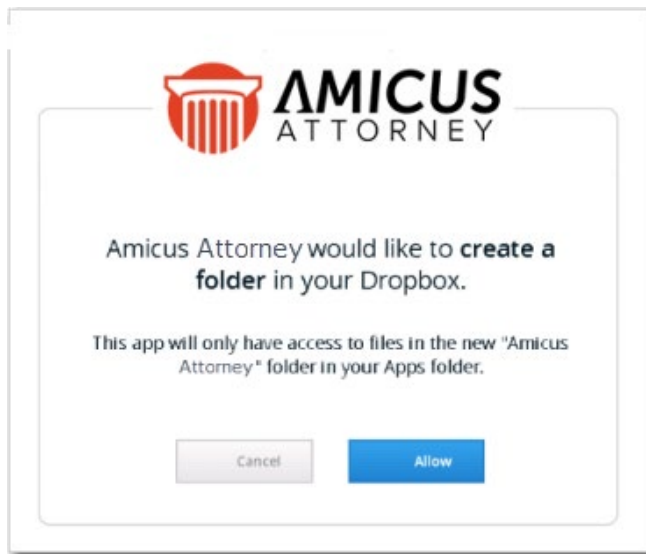


- 2 Select "Dropbox" as the document service to integrate with.
- 3 Click Enable Dropbox Integration.

- 4 A pop-up prompts you to sign in, with your credentials for the Dropbox account that will be used for the firm’s Dropbox documents.



- 5 A second pop-up prompts you to grant the Amicus application access to the “Amicus” Dropbox folder that will be created for its use. Click **Allow**.

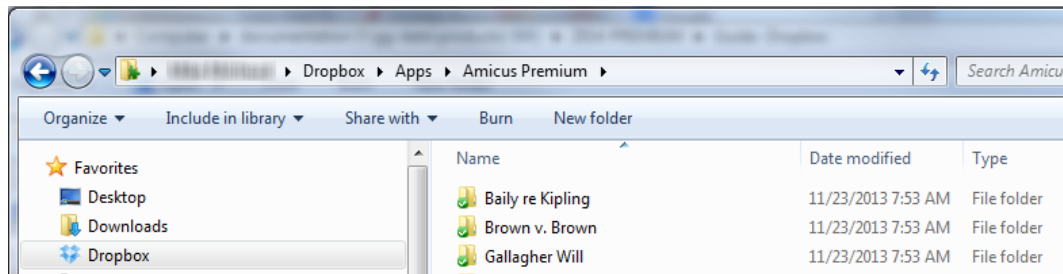


**TIP:** If you didn’t see these pop-ups, it could be because your browser is set to block them. You will need to allow pop-ups until after you’ve enabled the Link.

For example, Chrome blocks pop-ups by default. To unblock them, click **Customize and Control** at the top right of the browser, choose **Settings**, click “*Show advanced settings*”. Under **Privacy**, click “*Content settings*”. Then under **Pop-ups**, select the “*Allow all sites to show pop-ups*” option.

## Dropbox folder creation

Once you click **Allow**, an Apps\Amicus\ShortFileName folder is automatically created in Dropbox for each File in Amicus that isn't Closed. This could take several minutes, depending on the number of Files.



From now on, whenever a File is created in Amicus, a corresponding folder will be created in Dropbox.

## Populating the Dropbox folders

Simply copy existing documents into the appropriate File-specific folders, or create new documents there. Even create subfolders to help organize your documents on a File.



**IMPORTANT:** It's recommended that adding or moving a very large number of documents be done off-hours, as the process of full-text indexing and Amicus Document record creation can be intensive and lengthy.

See "Working in Dropbox".

## Dropbox user setup

While Amicus security controls a user's viewing and deleting of Dropbox documents from within Amicus, Dropbox security controls a user's adding, viewing, updating, and deleting of documents from within Dropbox. For these Dropbox add/update capabilities, a user requires Dropbox account access to the appropriate "Amicus" folders.



**IMPORTANT:** For security purposes, it's recommended that the owner of the Dropbox account used for the firm share only the relevant File-specific folders to each user's Dropbox account. For example, if a Firm Member is on the Widgeco File, share the "Widgeco" folder with them. Otherwise, providing the user with full access to the firm's Dropbox account, or sharing the entire "Amicus" folder to the user's own Dropbox account, would give the user access to *all* Amicus Dropbox documents.

As a Firm Member's assignment to new or existing Files is changed, or if a File is renamed, you'll need to change the Dropbox folder sharing accordingly.

## Working in Dropbox

Users who need document add/update capabilities require a Dropbox account with access to the appropriate “Amicus” Dropbox folders.



**IMPORTANT:** It’s recommended that adding, replacing, deleting, or moving a very large number of documents be done off-hours, as the process of full-text indexing and Amicus Document record creation can be intensive and lengthy.

### How to use Dropbox

- From a desktop or laptop computer, use the Dropbox folders installed on that computer, or upload documents directly to folders at the Dropbox website via your browser.
- From a tablet or smartphone, use the Dropbox app installed on that device.

See your Dropbox documentation for full details.

Action in Dropbox	Effect in Amicus
<b>Add a document</b> —Add to the <code>Apps\Amicus\ShortFileName</code> folder in Dropbox, or to a subfolder of that folder.	Document Detail record is created in Amicus, and document is indexed for searching.
<b>Edit a document</b> —Open and edit document in its Dropbox folders, or copy new version there to replace it. Or open document from Amicus and then Save As it to its Dropbox folder.	Document is reindexed.
<b>Delete a document</b>	Document Details record is deleted, and document is deindexed.
<b>Rename a document</b>	Previous Document Details record is deleted, new Document Details record is added (without the previous summary and other details or assignments), and document is reindexed.
<b>Add subfolders</b> —Under a File folder. E.g. add “Filings” subfolder under “Baily re Kipling” File folder.	Subfolders appear in navigation panel of the Documents view of a File.
<b>Move a document</b> —From one File folder to another, or between the subfolders within a File folder.	Previous Document Details record is deleted, new Document Details record is added (without the previous summary and other details or assignments), and document is reindexed.
<b>Rename a File folder</b> —E.g. from “Baily re Kipling” to “Baily v First Edition Publishing”. <b><i>DON'T DO THIS HERE. If you need to rename a File, do it from within Amicus instead.</i></b>	Document Details records are deleted.
<b>Rename a subfolder</b>	Subfolder name changes. For any documents in the subfolder, the path shown in Document Details records changes accordingly, and other details information and assignments are maintained.

**If a Firm Member closes an Amicus File and then later reopens it**, any new documents or subfolders added in Dropbox during the period it was Closed will not appear in Amicus, and any changes made in existing documents will not be included in full-text searches. To update Amicus with these items, simply open and resave them in Dropbox.

# Working in Amicus

Amicus provides easy access to Dropbox documents related to your matter Files, from both the Documents module and File Details.



**Note:** Dropbox documents are accessible from both Amicus Attorney desktop application and Amicus Anywhere.

## From a File

To view a list of Dropbox Documents associated with a particular File, open the **File Details** window, and choose **Documents > Dropbox** in the navigation list in the control panel.

Any subfolders within the File folder in Dropbox are available in the navigation list.

The screenshot displays the Amicus Attorney interface for the 'Alladin Purchase' file. The left sidebar shows navigation options like 'ATTORNEY', 'BILLING', 'People on this File', and 'File Facts'. The main area shows 'People on this File' with a table listing individuals and their roles. Below this, there are options to set the 'Role on File' and 'Client Is'. A 'Dropbox' section is highlighted with a red box, showing a list of documents. The document 'alladin file.docx' is listed with a date of 'Nov 30/2020 1:16PM' and 'Heather Gavel' as the author. The interface also includes a 'Delete' button for the document and a 'Save & Close' button at the bottom right.

Name	Company	Role	Details
Mathew Alladin		Client	Mr. Mathew Alladin
Samuel Beatty	Beatty & Perrin	Lawyer	
R. Kipling	First Edition Publishing	Vendor	

Document Name	Date	Author
alladin file.docx	Nov 30/2020 1:16PM	Heather Gavel

- **View and edit a Document Details record** that describes the document—see “*Document Details*”.
- **View the contents of the actual document** in its native application, provided that your computer is connected to the Internet. This downloads the document to the Downloads folder set by your browser. If you have a Dropbox account with access to the File folder, you can edit the document and click **Save As** to return it back to that folder.

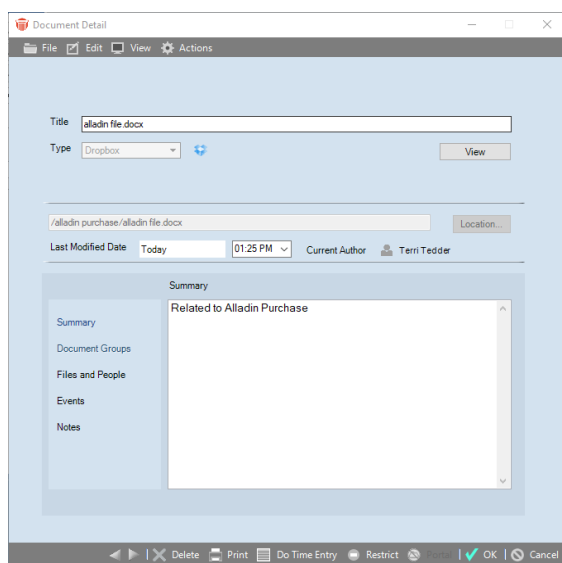
- **Delete a Document** – Deletes both the Document Details record from Amicus and the document itself from Dropbox.
- **Search** the information stored in the Document Details records. For a full-text search of the documents themselves, use the Documents module – see *“From the Documents module”*.
- **Refresh the list**—Changes in Dropbox, such as documents added or changed there, sync to Amicus every 15-minutes and will then appear in File Details the next time it’s opened. To start the sync now, choose **Actions > Refresh Dropbox** from the toolbar.
- **Amicus-Managed**—If your firm is configured as an Amicus-Managed Documents environment, note that Check Out/Check In functionality is not applicable (and not available) for Dropbox documents.

### What happens when a File is renamed, closed, or deleted

Action in Amicus	Effect in Amicus	Effect in Dropbox
<b>Rename a File</b>	Documents are still listed, accessible, and searchable.	File folder is renamed and documents are left intact.
<b>Mark a File Closed</b>	Documents are still listed, but syncs no longer occur and so the list will not be updated with any subsequent changes made in Dropbox. Documents remain accessible and searchable from Amicus as long as they aren't deleted in Dropbox.	File folder and documents are left intact.
Delete a File	Document is are no longer listed or searchable.	File folder and documents are left intact.

### Document Details

The Amicus Document Details record for a Dropbox document is much like one for a regular document.



- **Edit Document Details:** Title, date, author, summary, Firm Members, and Events. Document Type is always “Dropbox”. Author and Firm Member assignment are set by default to the File’s Responsible Lawyer. Amicus view/edit restrictions are possible.



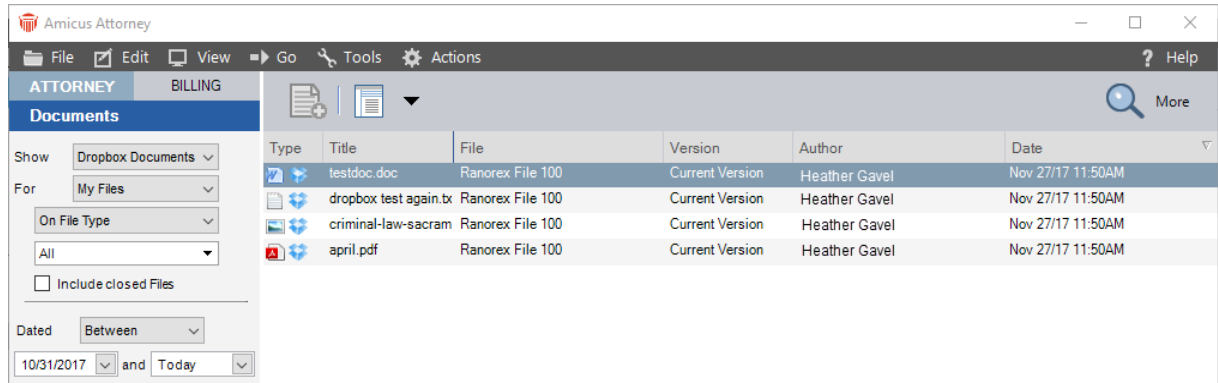
- **Open the contents of the actual document** in its native application, provided that your computer is connected to the Internet. This downloads the document to the Downloads folder set by your browser. You don't need a Dropbox account to do this.

If you have a Dropbox account with access to the File folder, you can edit the document and Save As it back to that folder.

- **Delete Document** – Deletes both the Document Details record from Amicus and the document itself from Dropbox.

## From the Documents module

In the Documents Index, Dropbox documents appear if you're assigned to them or they're on Files you can access. They're identified by a Dropbox icon in the Type column.



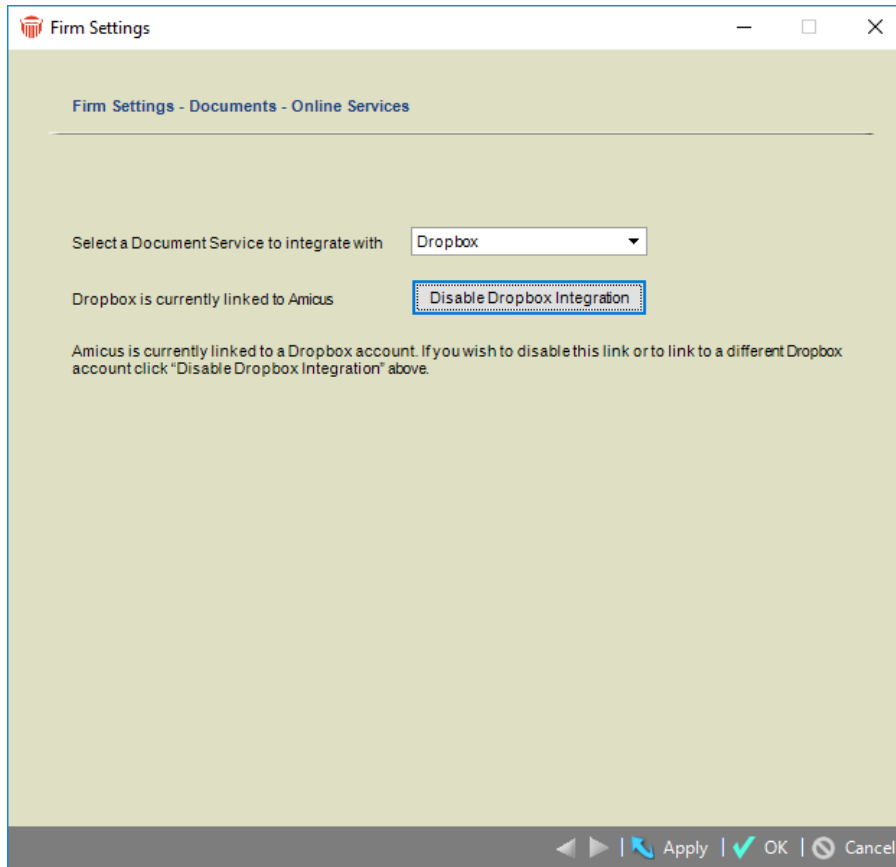
- **Show** filter in the control panel has an extra option, “Dropbox Documents”, which limits the list to Dropbox documents only. The other Show options also include Dropbox documents.
- **View and edit a Document Details record** that describes the document – see “*Document Details*”.
- **View the contents of the actual document** in its native application, provided that your computer is connected to the Internet. This downloads the document to the Downloads folder set by your browser. You don’t need a Dropbox account to do this.

If you do have a Dropbox account with access to the File folder, you can edit the document and Save As it back to that folder.

- **Delete a Document**—Deletes both the Document Details record from Amicus and the document itself from Dropbox.
- **Search**—Dropbox documents are included in both title/subject and full-text searches.
- **Refresh the list**—Changes in Dropbox, such as documents added or changed there, sync to Amicus every 15-minutes. To start the sync now rather than waiting, choose **Actions > Refresh Dropbox** from the toolbar.

# Disabling the Link

- 1 Go to **Office > Firm Settings**, and click **Documents - Online Services**.



- 2 Click **Disable Dropbox Integration**. The “Amicus” folders and documents in Dropbox will be left as is.
- 3 Choose whether to keep the Document Details records in Amicus (including any summary and assignments) even though the documents themselves will no longer be accessible. The Documents will still be searched in Amicus, including their full text as of when the Link was disabled.



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