Winter 2011 Volume 24, Issue 1

Needles® Sidebar Newsletter

President's Letter

Dear Clients:

Happy New Year! As Needles heads into 2011, we have much to announce and celebrate with our clients! In October, we hosted a Usergroup meeting where more than 250 of our clients assembled to learn the latest and greatest about our program, hear from industry professionals, and learn from their peers. We are thrilled to have hosted such a great group of clients and friends, and we want to send a special thank you to all those who took the time to speak. From exciting announcements, to great tutorials, to a visit from a helpful monkey; the meeting truly had it all. If you could not make it, here are the highlights: Usergroup Highlights

We are proud to announce that Needles Version 4.8.2 is available for download from our website and includes an exciting update: Basic Auditing! Have you ever wanted to know who created or changed a calendar item or a note in a case? Our clients requested the ability to audit cases, and we are excited to offer it with this new version. Firms will now have the ability to track by whom and when an item has been created or last modified in the following areas of Needles: Names, Notes, Case Tab, Value Tab items, and Calendar items. Visit the Client's Only section of www.needles.com now to download the latest version of Needles!

Needles now offers a comprehensive Case Type Library online. This new resource, which is the result of many years of gathering case type set ups, is really exciting. It showcases what a sense of community there is among Needles clients. Clients running the latest version of Needles may download these case type set ups into their own Needles system. Of course, this resource is one that will grow and change as the industry grows and changes, so please check back often and consider sharing a resource of your own! Again, visit the Client's Only section of our website to take advantage of this resource.

We've said it before, but it certainly bears repeating: please take a few minutes to check your Needles backup. We've once again included instructions for a proper backup within this edition of Sidebar. Make it a New Year's resolution to make sure you are getting good and frequent back ups. A little time to check now will save you a lot of time and heartache down the road!

Congratulations to our Client of the Quarter, Hughes & Coleman. Their longtime support and innovative use of Needles make them one of the most respected firms in the country!

As always, please continue to submit wishlist items, contact us when you have questions, and check our website frequently. We are looking forward to another great year with the best clients in the business!

Regards,

Bryan Billig
President, Needles Inc.

Did You Know?

> How much Needles values your referrals? Needles prospects receive a full package of information, including a demo disk with a working copy of our program. The firm that referred the prospect receives a gift from Needles!

> How easy it is to request additional licenses for your Needles program? Give us a call or, if you are using the most recent version of Needles, click on Help.

> That Needles training is never over? There is always something new to learn or a more efficient way of handling data. Consider a seminar or an advanced training for your firm!

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Please note that our company name has changed to Needles, Inc. Checks made out to the company for support and other invoices should be made out to Needles, Inc. Thank you!

Additions to the Needles Staff

Penny Vanderhorst joins the Needles family as Quality Assurance Specialist. Originally from Georgetown, South Carolina, Penny now resides in Columbia, Maryland. She graduated from Spelman College in Atlanta with a BA in Economics and has spent the last 15 years as a Quality Assurance Specialist with a major national insurance company. Her past experience will serve her well as she implements quality assurance procedures at Needles. Penny has two young adult daughters, with whom she enjoys spending quality time. She also enjoys reading, watching old black and white movies, and taking long walks with her Jack Russell Terrier, Diamond. Penny lives by the quote, "To whom much is given, much is required."

2011 Tradeshow Schedule

Needles will be exhibiting and/or speaking at the following upcoming legal conferences. We hope you'll be able to join us! Check out Events at Needles for updated schedules, as we are always adding more.

- Legal Tech New York—January 31 - February 2, 2011 in New York, NY
- AAJ 2011 Winter Convention—February 5-9, 2011 in Miami, FL
- ATLAS Lawyers Marketing Group—March 17-18, 2011 in Naples, FL
- PILMMA Spring Summit—April 1-2, 2011 in Atlanta, GA
- ABA Tech Show—April 11-13, 2011 in Chicago, IL
- NJAJ Boardwalk Seminar—April 14-15, 2011 in Atlantic City, NJ
- 2011 ALA Annual Conference—May 22-25, 2011 in Orlando, FL

Needles Beyond the Basics Seminar

March 7-8, 2011 - Two Day Seminar
The Golden Nugget, Las Vegas

Needles Beyond the Basics: In this two day seminar, attendees will learn how to build and use Needles to take advantage of Needles' latest features for more power and greater efficiency. All aspects of building and using a well tuned Needles system will be covered from intake to closing. Each attendee will work on their Needles system. Emphasis will be placed not only on the basics, but also on how to use the newest features in Needles.

Information: Needles will be running a "green meeting." Paper materials will not be printed for distribution at the class. Attendees will receive a flash drive of handout information at the seminar. Classes run from 9:00 am to 5:00 pm with a Lunch Break from 1:00 pm to 2:00 pm daily.

Pricing Two Day Beyond the Basics Seminar: $850 for the first attendee from the firm.
$425 for each additional attendee from the firm

For more information or to register, please visit the Seminar Schedule

Support is more than just technical!
Our Needles Support staff is comprised of both technicians AND trainers. If you come across a feature and need information, don't know or remember how to enter data, or just have a question about something you learned at your training, don't hesitate to call our support line and ask!
410-363-1976.

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Case Type Library Now Available

In our 25 years of business, we have strived to maintain a sense of community among our clients. These efforts have served us well. Not only do we enjoy the success of amazing User Group Meetings like the one in Las Vegas last year, but we also benefit from a steady flow of new ideas for using the Needles program. There are few companies that can boast of a clientele who is so willing to share their wealth of knowledge. Each contribution, large or small, enhances the final product. For example, a few years ago, the idea of a Medical Request Tab originated during a client's training. The concept was then developed and expanded, with the help of Certified Needles Trainers Lonnie Wright and Sherryl Coleman and introduced to our standard case type set up. There are numerous examples of collaborative efforts that have shaped and defined the case type setups that many of you are using today.

Over the years, our Needles Trainers and loyal clients have collaborated to develop a strong and diverse case type library. How can you be a part of this? How can you get your ideas and voice heard? If you are interested in sharing your case type, Needles will supply you with a Permission Form. This document specifies the exact areas of the program that you are willing to share. After we receive the case type, it goes through a vetting process. All identifying coding is removed and the case type is formatted to the standard of the library. Many times we receive more than one example of a particular case type, and then we enjoy picking the best of the best. We are pleased to announce the addition of five new case types to an already impressive resources library. The new case types are:

- Probate
- Estate Planning
    - *Our previous Estate Planning, which was developed to handle both Estate Planning and Probate, has been split to address each aspect of the matter separately. Similarities between the two case types allow you to copy the information from the Estate case into a Probate case when necessary.*
- Real Estate Closing
- Insurance Defense
- Construction Civil Litigation

These five case types are our newest, though we have also revamped many of our existing case types. We have modified a majority of the other case types to streamline their usage with each other, improve the work flow and we have taken advantage of new features that are now available with our latest upgrades.

The new Needles Case Type library is available on our website today. To review our entire Case Type Library, go to the Client Only section of our website, click on Support and then Case Type Library. There, you will see a list of all available case types. These case types are available in Needles 4.8.2 , so you must be current with Needles program upgrades to import the case types to your system. With each case type there is an instructions file detailing the setup and recommended usage of the case type. After you review this document and decide to download the case type, you will follow instructions to import that case type into your own Needles system. If applicable, you will also have access to a list of merge-able document templates to incorporate into your system and a report library file with User Defined Reports specifically created to be used with the case type. Before importing a case type that you are currently using in your system, it is recommended that you speak to your Trainer to discuss the implementation of a case type, deciding which case type is most suitable for your firm and changing existing cases to the new case type.

Many of our most successful clients are the most generous with their time and insights. We would like to thank everyone who directly and indirectly contributed to our stable of case types.

Client of the Quarter

Congratulations to Hughes & Coleman for being selected as the Needles Client of the Quarter! This large Kentucky based firm first began a relationship with Needles back in the days of our dos-based software known as PINS. That relationship that began more than 20 years ago continues to prosper to this day. Hughes & Coleman takes advantage of frequent Needles trainings, attends seminars and Usergroup meetings, and keeps current with Needles updates. Their unwavering commitment to the program and to law office efficiency has resulted in them recently opening their 200,000th case in Needles! We spoke with Executive Director Micki Love about the firms' growth both in size and in maturity with the Needles program:

When did you install Needles?
1986/1987 (I think)- We were PINS clients and converted to Needles!

What was the turning point of efficiency for the firm?
Hughes & Coleman knew that growth was the key to success, and we needed to find a way to keep our caseloads growing, without burdening the staff. By adopting the Needles program, we were able to continue to add new cases and work them more efficiently and effectively.

What do you attribute that to? Needles manager? Case type development?
As the firm grew, we knew organization was important. We worked with our friends at Needles to customize the best use of the program for Hughes & Coleman. We knew where we wanted to go, and Needles helped us get there. By using the options available to us, we were able to build Needles to work for us.

With 200,000 cases behind you what are the key lessons you have learned in managing such a large and diverse case load?
One of the main lessons we learned is junk in - junk out. Early in our use of Needles we were very flexible when allowing staff to enter data and how it was entered. However, as we began to approach the business side of the law firm and looking for a way to get the competitive edge, we knew that we would have to monitor the input of data so that the output could help us reach our long term goals. For success in today's market place you need a competitive edge and we believe Needles delivers that for us.

Has remote hosting by mindSHIFT helped you to manage the database more than it would be onsite?
Definitely. At our firm, we try to stick to what we do best. We believe that is client service - not computer service. Server maintenance was not something that we were great at and often our database did not get backed up like it should. From a management stand point, I feel more secure knowing that my database is backed up every night and is available on a number of different servers - preventing downtime. No longer do I worry about our server crashing and losing all of our client data. We could not function without Needles.

Congratulations again to Hughes & Coleman. Keep up the great work!

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Auditing with Needles

As announced at the Needles Users Group Meeting in Las Vegas, Needles 4.8.2 can provide auditing information on new items created and existing items that have been modified.

The ability to track by whom and when an item has been created or last modified is available in the following areas of Needles:

- Names (this includes both Parties and Providers)
- Notes (this includes Case Notes, Value Notes, and Provider Notes)
- The Case Tab
- Value Tab items
- Calendar items

As new items are created in each of these five areas, the staff creating them and the date the items were created are now stored, although they are not made visible. Similarly, when information is modified in these five areas, the staff modifying and the date modified are also stored.

Audit information will only be available for items created or modified after the installation of Needles version 4.8.2. Items created before version 4.8.2 is installed won't show a Created Date or Staff, but they will audit for the last modification made since the updated version has been installed. Needles Auditing Reports are available under the Management Reports Menu and require Priority for Management Reports. Needles Auditing Reports provide extensive filter criteria and also offer an exciting new feature exclusive to Needles called Audit Rules. These Audit Rules are additional filters that can be used to pinpoint items where the data entered needs to be identified, such as:

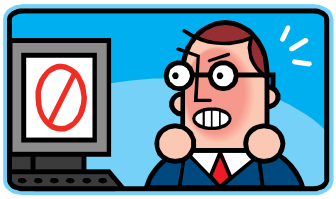
- Items created by one staff and modified by another
- Items modified after they had already been created
- Items that display illogical dates when compared to when they were actually created or modified
- Items that no staff person will claim as their own

Auditing Rules will restore confidence that Notes and Value items and Calendar items have not been mishandled since they were created. Auditing will improve the quality of your Needles data in many ways, especially how it will allow management to know when and by whom duplicate or incorrect providers, parties and calendar items are created. When you can identify the staff making a mistake, you can pinpoint who may need refresher training, increased supervision, or a change to their Staff Priority levels.

The main purpose of Auditing is to increase your confidence in the quality of your Needles Data.

As always, the Needles support team is available to answer any additional questions you may have about this powerful new feature.

Needles Backup



It's not a matter of *IF*, but *WHEN*...

WHEN could occur at any time and for any reason.

It could be from something totally unexpected such as a pipe bursting in the office upstairs and flooding your server room, bad wiring causing a fire, or just a power outage crashing your server.

WHEN could occur from low disk space, failed RAID controller, bad memory chip or corrupted hard drive.

Or it could occur from a disgruntled employee damaging equipment, deleting files or stealing computers.

... and when it happens, a valid backup may be the only thing saving you from the loss of days, months or years of work.

Check your backup today!

Understand your backup procedures, where the backup runs, where it backs-up to and how often. Remember to always backup the Needles database with the included Needles Backup Coordinator and to include the backed-up Needles files in your nightly network backup routine.

For more information regarding the Needles Backup, please see the latest Needles Backup Instructions available at www.needles.com (under the *Support-Needles Downloads* section) or call Needles Technical Support at: 410-363-1976.