

Trust Safety Accounting Upload Using EsiLaw 360 Software

ESILaw 360 has a feature in their software to allow Alberta Law Firms to download data files to their computer and then upload the files to the Law Society.

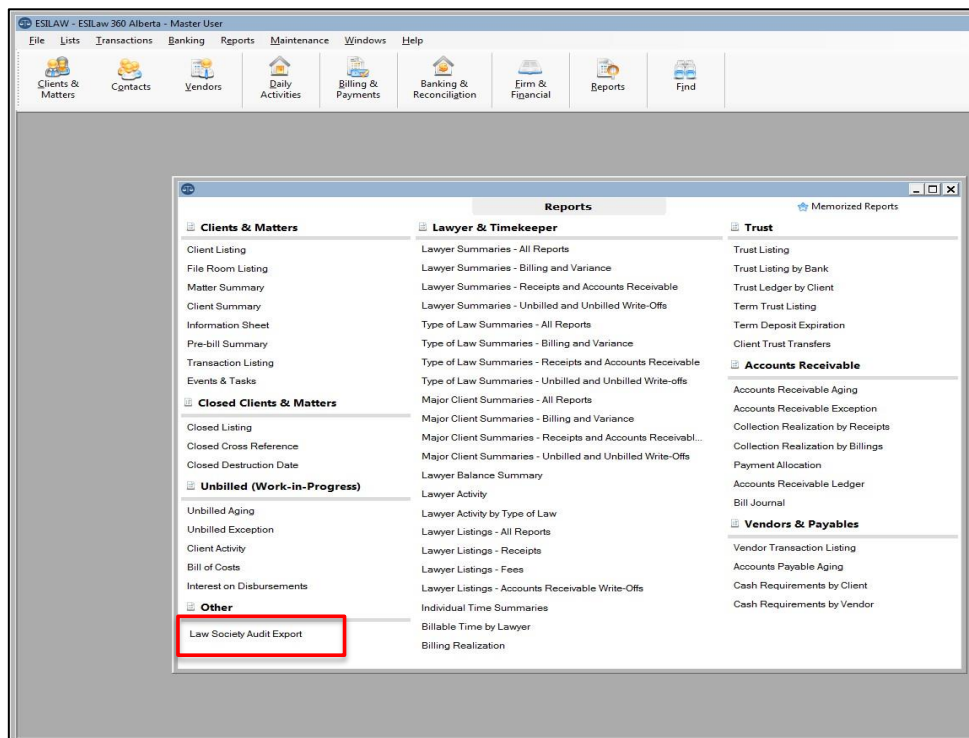
NOTE: All law firms must use the new PricewaterhouseCoopers (PwC) Connect Tool to upload the data to the Law Society. An email will be sent to all Responsible Lawyers with instructions to login and use the Connect Tool.

The Administrator is the only person with the authority to activate and use the feature, and as such, the menu options and functionality described below will only be available to users with admin access.

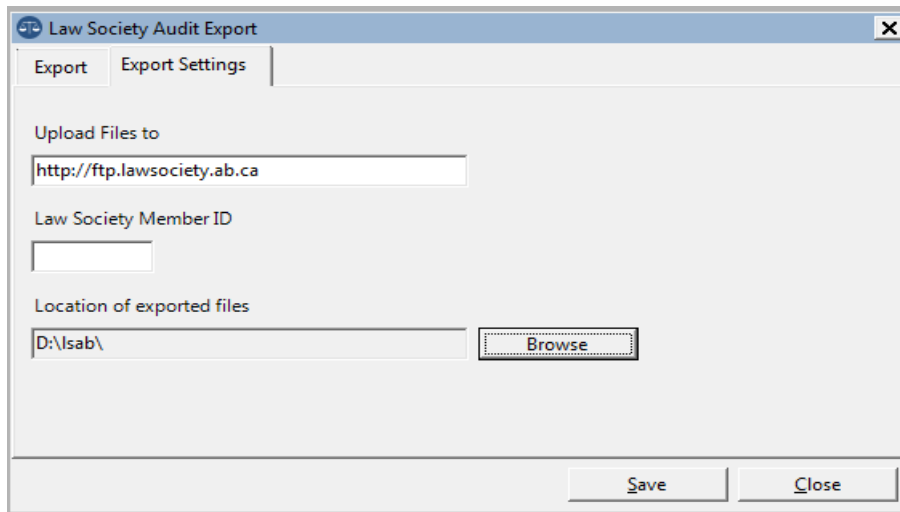
To create the files in ESILaw 360, the user needs to be the only person logged into the program.

How to use EsiLaw 360

1. Click the ESILaw icon and log into the software.
2. Select Reports to view all available reporting options.



3. Select Law Society Audit Export and click the "Audit Export Settings" tab:



Law Society Audit Export

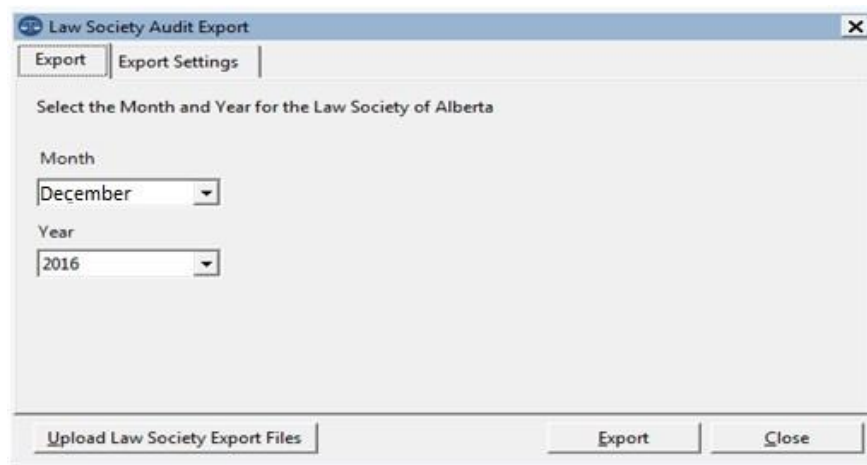
Export Export Settings

Upload Files to

Law Society Member ID

Location of exported files

4. Enter/Confirm the following information:
 - Upload location (<https://ftp.lawsociety.ab.ca>)
 - Responsible Lawyer's Law Society Member ID (Member ID can be found on the Responsible Lawyer's member card.) This must be the Responsible Lawyer's ID number – do not use 1234 or 9999.
5. Click Save.
6. Select "Audit Export" tab:



Law Society Audit Export

Export Export Settings

Select the Month and Year for the Law Society of Alberta

Month

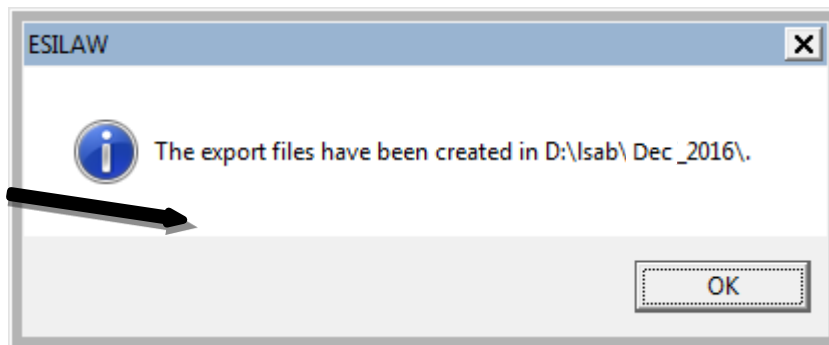
Year

7. Enter the following data for the Law Firm reporting period: Month (December) and Year.

The designated year end must be entered with the year for which you are reporting and the month as December.

For example, if the Law Firm is reporting for the 2016 reporting period, you would select December and 2016.

8. Click the 'Export' button. When completed the following message displays.



This dialogue box advises where the files are saved on the computer (this is set in the export settings tab). Please ensure that you write down this path to use in the next section "How to upload the files".

Uploading the files to the Law Society

All law firms must use the new (PwC) Connect Tool to upload the data to the Law Society. An email will be sent to all Responsible Lawyers with instructions to login and use the Connect Tool. There is also information available on the Law Society website www.lawsociety.ab.ca.

Questions?

If you have questions regarding the file transfer process or your data upload, contact the Trust Safety department by email at trust.safety@lawsociety.ab.ca or call 403-228-5632.