

# PricewaterhouseCoopers LLP

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2012 Billing Rate & Associate Salary Survey *plus*

Initial Release

**BRASS** *plus*

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Data Extraction Tool

Installation Instructions

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## SYSTEM REQUIREMENTS

Before you begin using the BRASS<sup>plus</sup> Data Extraction Tool, make sure your system has the following components:

<b>Computer/Processor</b>	133 MHz or higher Pentium-compatible CPU
<b>Memory</b>	At least 512 megabytes (MB) of RAM; more memory generally improves responsiveness
<b>Hard Disk</b>	2 GB with 33 MB free space
<b>Operating System</b>	Microsoft Windows 7 Microsoft Windows XP Microsoft Windows 2000, service pack 4
<b>CPU Support</b>	BRASS <sup>plus</sup> supports single and dual CPU systems
<b>Display</b>	VGA or higher resolution monitor
<b>Keyboard/Mouse</b>	Required
<b>Database</b>	<ul style="list-style-type: none"> <li>• SQLServer 2000 or later required</li> <li>• Elite (Note: Version 3E is not supported) or Aderant/CMS billing system</li> <li>• Database Name, ID, Password and Server Name</li> <li>• Administrative access to the workstation</li> </ul>
<b>Software</b>	<ul style="list-style-type: none"> <li>• .NET 2.0 (InstallShield will detect and install .NET 2.0, if necessary, during program installation)</li> <li>• J# (InstallShield will detect and install J#, if necessary, during program installation)</li> <li>• Microsoft Windows Installer 3.0, or later</li> </ul>

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## Required Tables for Aderant/CMS and Elite

The program uses certain timekeeper and billing data for extraction and mapping to the Survey. BRASS <sup>plus</sup> requires that the following tables be available (minimum read only) in your billing system for successful data extraction:

Aderant/CMS required tables	Elite required tables
blh_billed_fees	accrate
blt_bill	currates
hbl_dept	deptlab
hbl_office	htkeep
hbl_prof_ctr	location
hbm_name	matter
hbm_persnl	praccode
tbl_curr_rate	timecard
tbl_rank	timekeep
tbm_matter	timerate
tbm_persnl	title
tbm_rate_fee	tsection
glm_parms	
tat_time	
cms_option	

## INSTALLATION AND SET-UP

### How Previous 'Mappings' are Applied in BRASS <sup>plus</sup>

A powerful advantage of using this tool is that the 'mappings' of your firm departments and timekeeper titles to the corresponding PwC Survey classifications from previous surveys can be applied in this release.

**NOTE:** This feature only applies to firms who used the BRASS <sup>plus</sup> data extraction tool for the 2011 BRASS <sup>plus</sup> Initial Release, or the 2011 BRASS <sup>plus</sup> Mid-Year Release. If you last used the data extraction tool for a release prior to those two, your mappings will not be applied in the 2012 Initial Release survey; and you will need to perform the mapping process again in the data extraction tool.

There are two methods by which previous survey mappings in BRASS <sup>plus</sup> can be applied in this release. The method you use will depend on where the historical data resides.

- 1) If you are using the same PC that was used for the 2011 BRASS <sup>plus</sup> Initial Release or the 2011 BRASS <sup>plus</sup> Mid-Year Release data extraction tool, your mappings will automatically be applied during the installation process. Simply follow the Installation steps below. When finished, start BRASS <sup>plus</sup> and you will see the previous survey mappings applied.
- 2) If you are using a different PC than was used for the 2011 BRASS <sup>plus</sup> Initial Release or the 2011 BRASS <sup>plus</sup> Mid-Year Release data extraction tool, then proceed with the standard instructions to install BRASS <sup>plus</sup>. When finished, start BRASS <sup>plus</sup> and follow the steps in the User Guide (available from the Help menu) to Import Survey Mappings.

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**Access to BRASS<sup>plus</sup> Installation Website**

**NOTE:** The following installation steps must be performed by all firms who intend to use BRASS<sup>plus</sup>, **even if your PC already has BRASS<sup>plus</sup> installed from a previous survey release.**

Open your browser and go to:

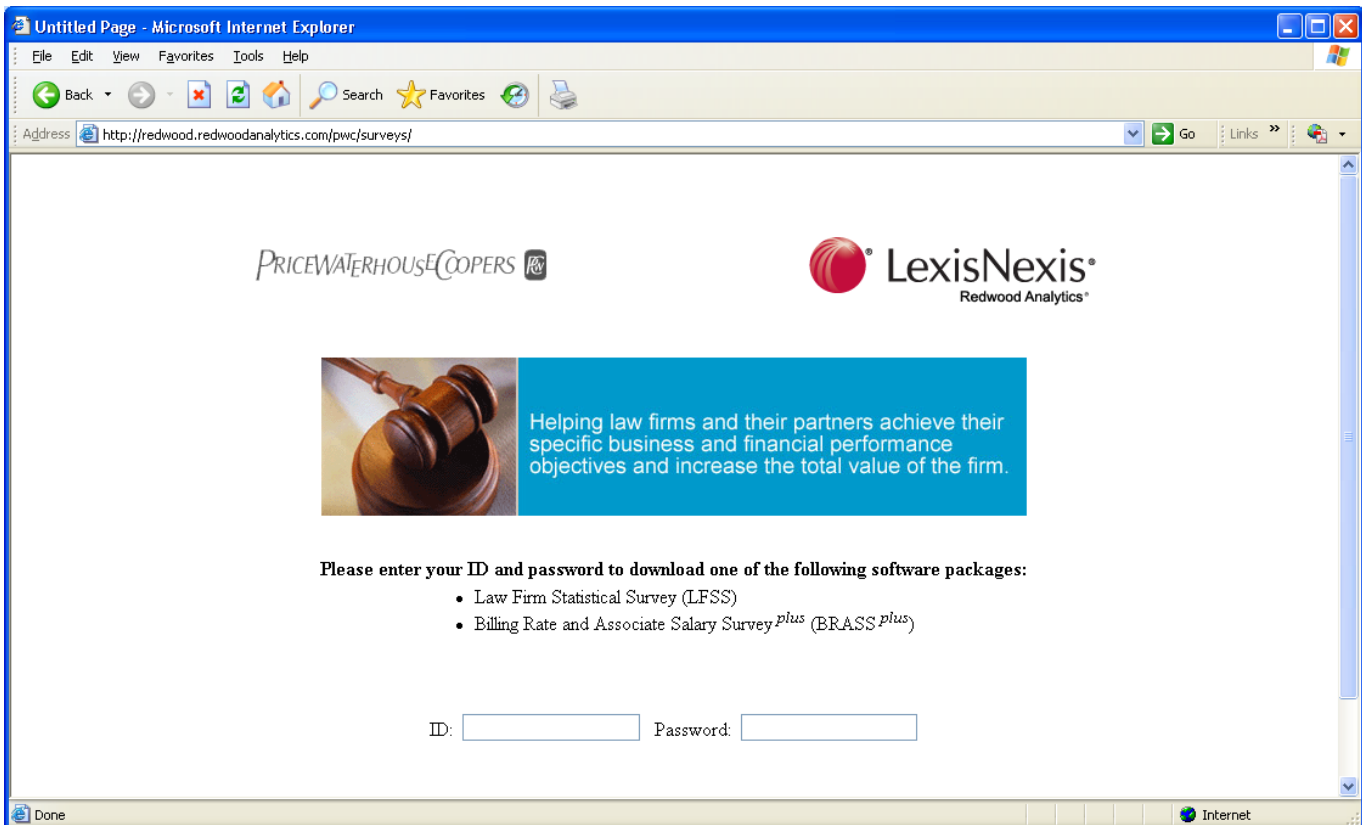
<http://www.lexisnexis.com/redwood-analytics/pwc/surveys/>

Enter the User **ID** and **Password** in the spaces provided within the application.

User **ID**: surveys

Password: pwc2012

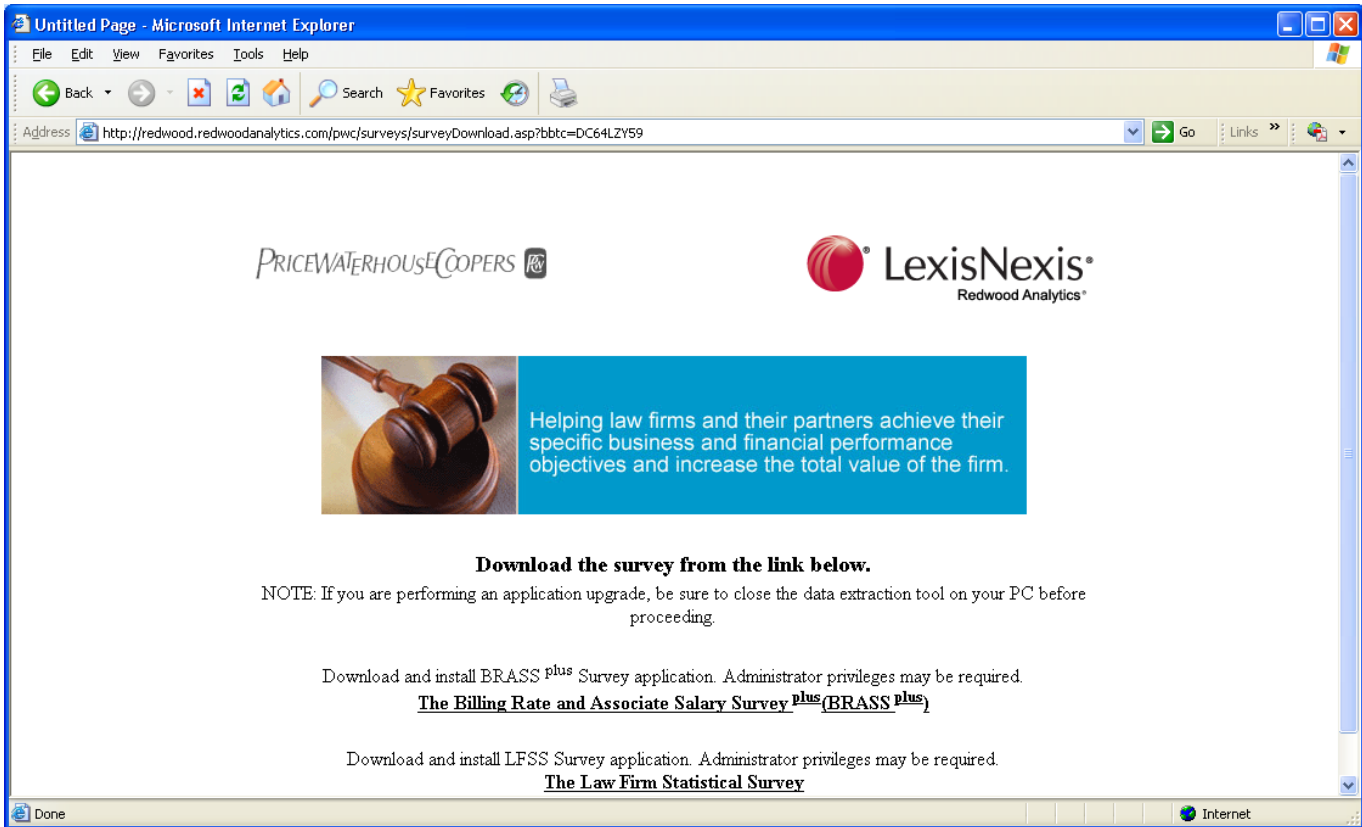
Press **Enter** key to login.



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The **Download Survey** page displays.



Click the **The Billing Rate and Associate Salary Survey<sup>plus</sup> (BRASS<sup>plus</sup>)** link to download BRASS<sup>plus</sup> and install it on your computer. Administrator privileges may be required to install the software.

### **Download BRASS<sup>plus</sup>**

When the **The Billing Rate and Associate Salary Survey<sup>plus</sup> (BRASS<sup>plus</sup>)** link is clicked, the **File Download – Security Warning** dialog displays. Select **Run** to immediately run the setup file, or choose **Save** to download the setup file and save it to your desktop. If you save the setup file to your desktop, you will have to click on the setup file to install the program.

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***Run Option***

Select **Run**, and the software downloads. A loading bar indicates the progress of the download.



When the download is complete, the **Run** dialog displays.



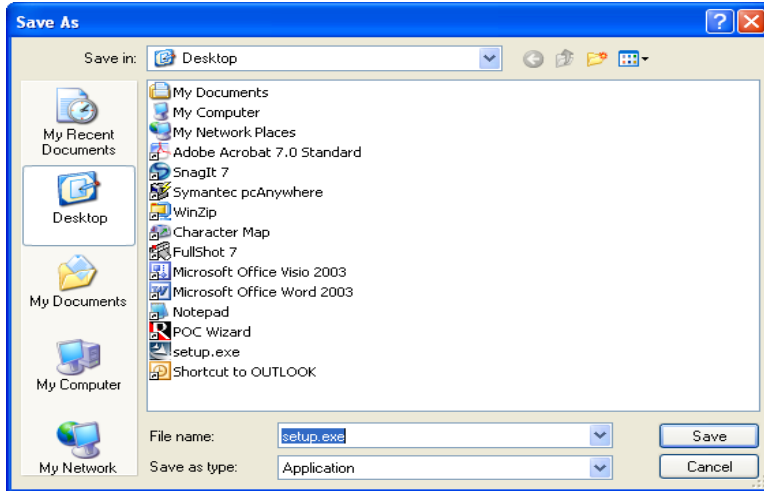
Click **Run** to proceed with the installation.

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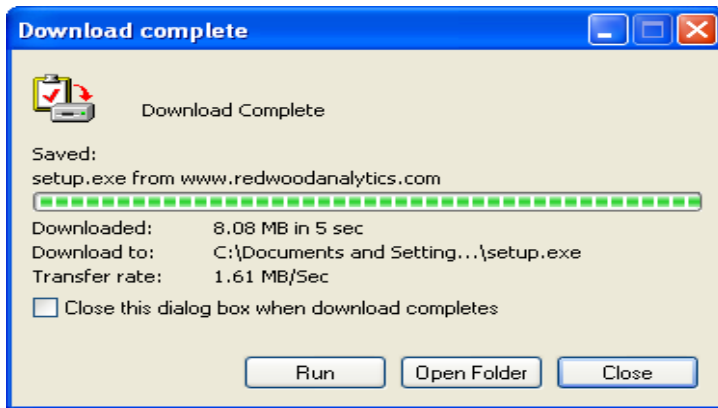
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**Save Option**

Select **Save** on the **File Download – Security Warning** dialog and the **Save As** dialog displays. The default **Save in** location is the desktop. Click **Save**.



Click **Run** on the **Download complete** dialog.



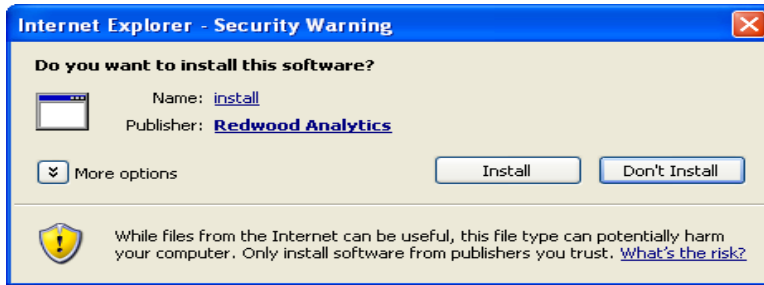
The **Run** dialog displays. Click **Run** to proceed with the installation.



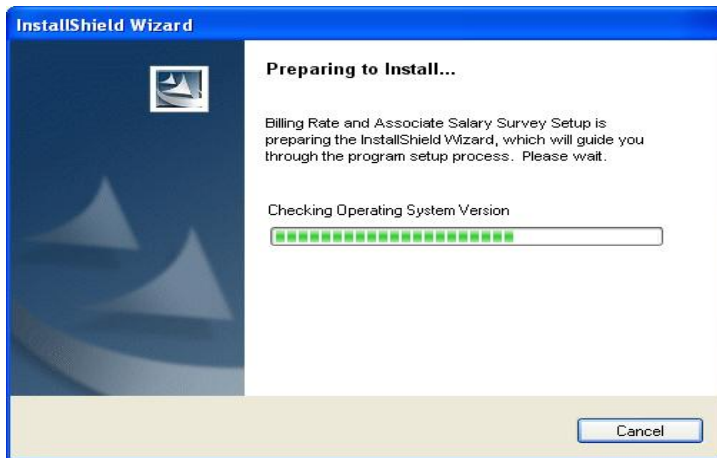
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The installation confirmation dialog displays, click **Install** to continue.



The InstallShield Wizard launches.



Once the Wizard is ready, the InstallShield installation Wizard opens. Follow the directions in the next section to install the program.

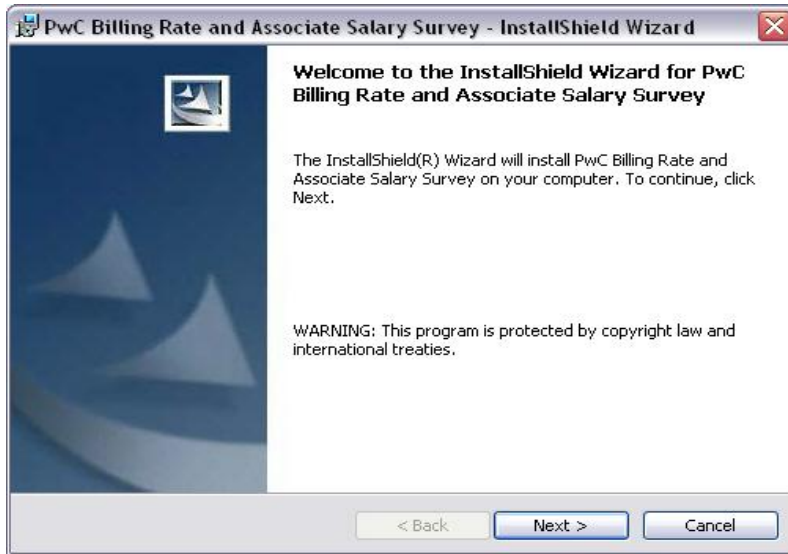
**NOTE:** If your PC **does not** have a previous version of the BRASS<sup>plus</sup> data extraction tool installed, proceed to the following section: "Install BRASS<sup>plus</sup> - First Time Installation on PC". If a previous version of BRASS<sup>plus</sup> **is currently installed** on your PC, you will be prompted to "**Upgrade**" the application at this point. Proceed to the "Install BRASS<sup>plus</sup> - Upgrade Option" section below.

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**Install BRASS<sup>plus</sup> - First Time Installation on PC**

When **Run** is clicked on the digital signature dialog, the BRASS<sup>plus</sup> Survey InstallShield Wizard launches. The **Welcome** dialog displays. Click **Next**.



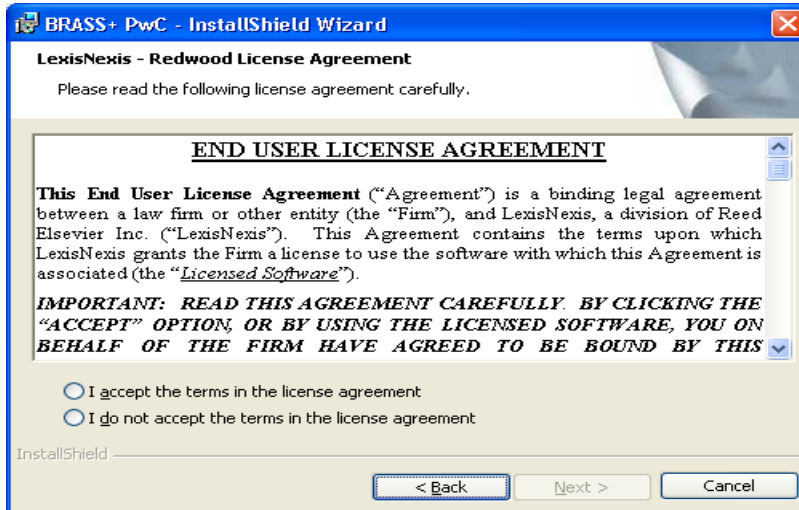
The **PricewaterhouseCoopers LLP License Agreement** displays. Please read the agreement, and then click the radio button next to **I accept the terms in the license agreement**. Click **Next** to proceed with the installation. If you do not accept the terms, you will not be able to continue with the installation.



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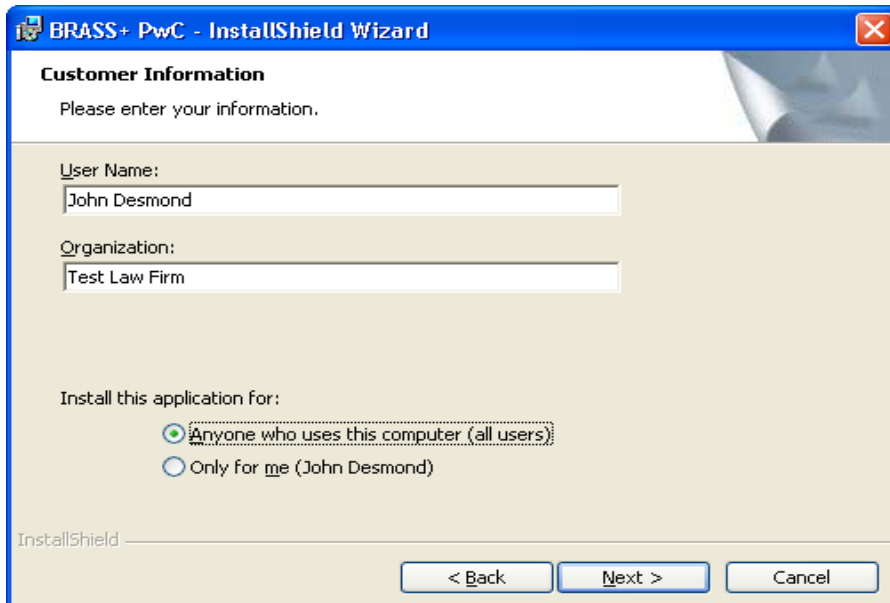
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The **LexisNexis - Redwood Analytics License Agreement** displays. Please read the agreement, and then click the radio button next to **I accept the terms in the license agreement**. Click **Next** to proceed with the installation. If you do not accept the terms, you will not be able to continue with the installation.



The **User Designation** dialog displays. Choose whether the BRASS<sup>plus</sup> installation will be available for all users of the computer, or limited in access to a single user. To specify a single user, type the name in the **User Name** field and select **Only for me**.

Click the **Next** button to continue with the installation.

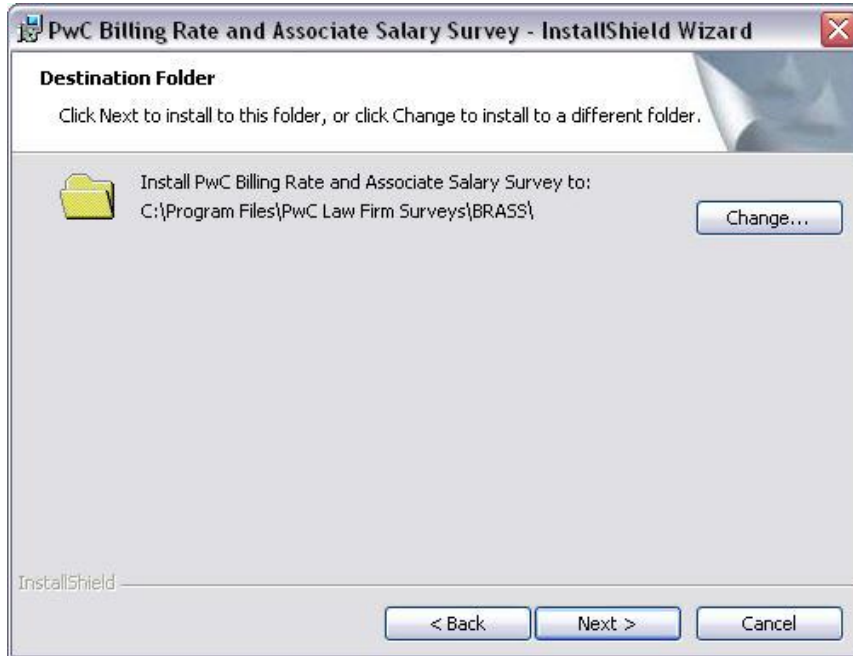


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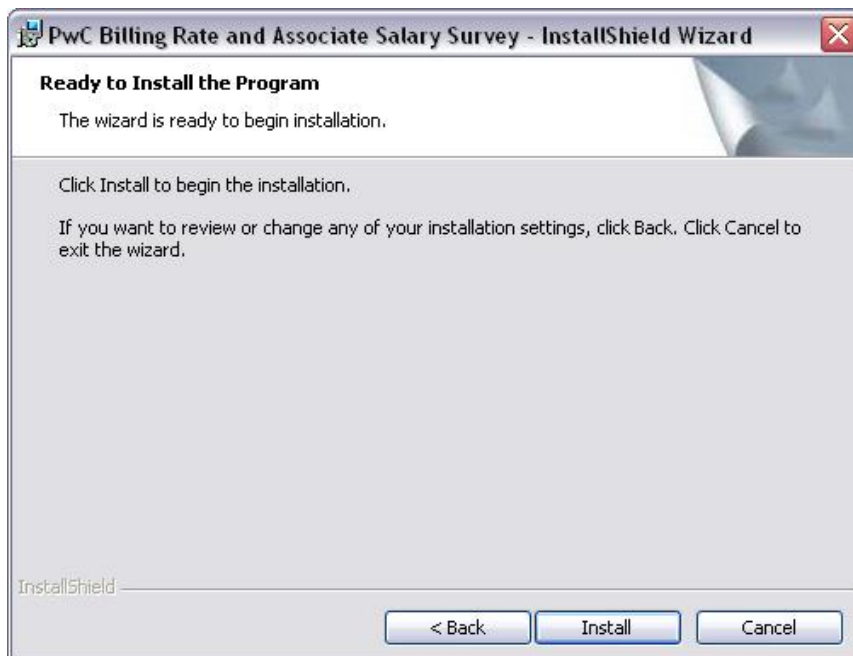
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The **Destination Folder** dialog opens. A recommended file path is set up as the default. Click **Next** to install to this directory location. You may designate a different "local" path by clicking the **Change** button.

**Note:** This application should not be installed on a shared or network drive.



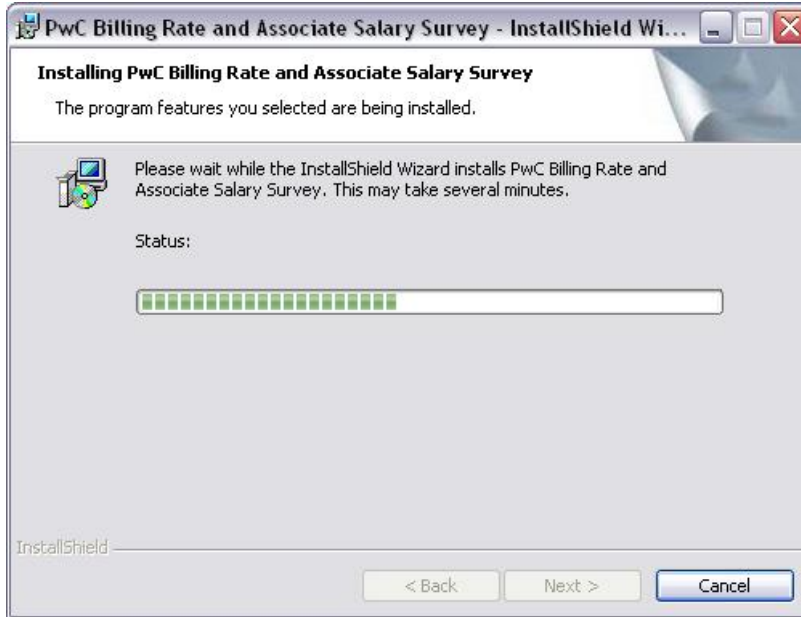
The **Ready to Install the Program** dialog displays. Click **Install** to begin the installation.



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Clicking the **Install** button launches the installation process. When the green loading bar fills, the **Back** and **Next** buttons will be enabled. Click **Next** to continue with the installation.



When the installation is completed, the **InstallShield Wizard Completed** dialog displays. Click **Finish**. You can now work with BRASS<sup>plus</sup>.



To launch BRASS<sup>plus</sup>, open your computer's **Start** menu, select **All Programs**, navigate to **PwC Law Firm Surveys** and click **BRASS+**

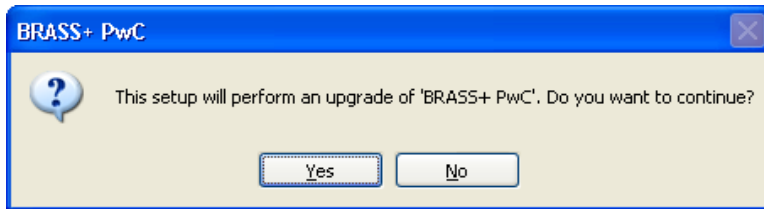
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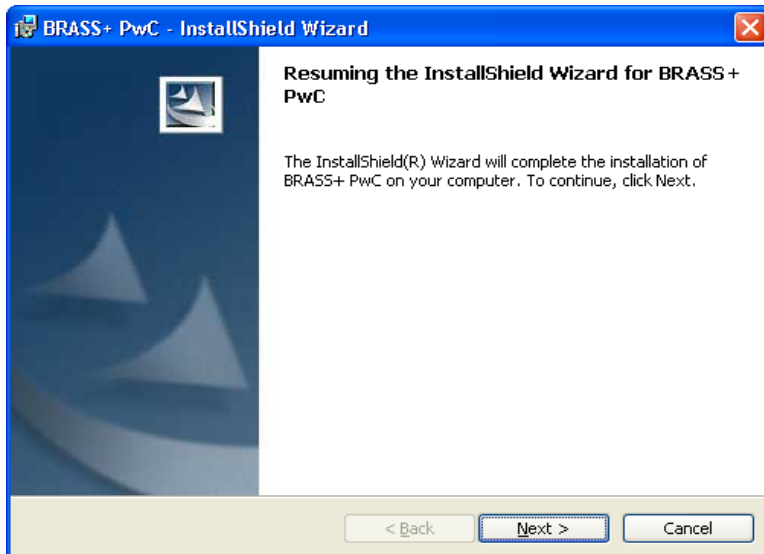
**Install BRASS<sup>plus</sup> - Upgrade Option**

If BRASS<sup>plus</sup> has already been installed on your PC, you will receive the following upgrade prompt:

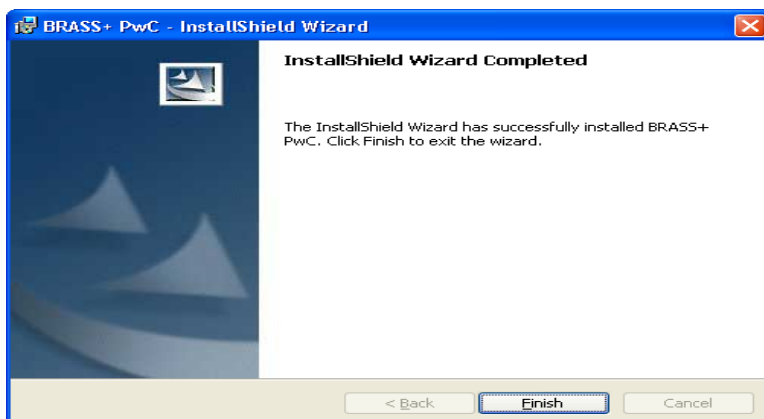
Click **Yes** to continue with the upgrade.



The InstallShield Wizard will load, click **Next** to continue.



Click **Finish** to complete the upgrade.



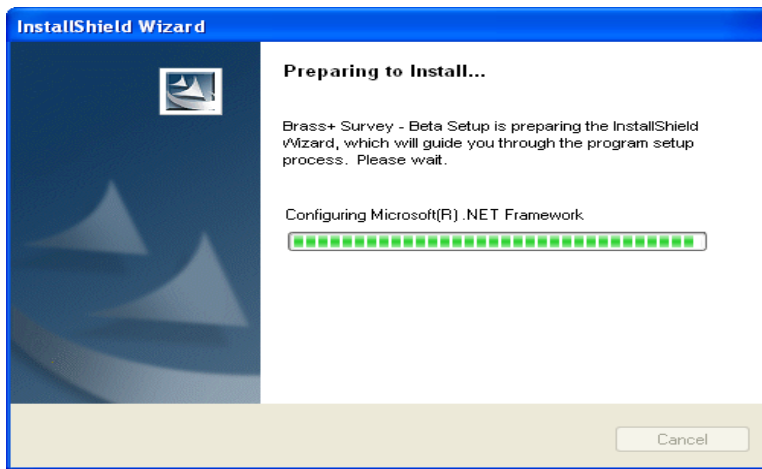
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## Installing .NET 2.0

BRASS<sup>plus</sup> requires .NET 2.0 to run. When BRASS<sup>plus</sup> is installed, the InstallShield Wizard searches for .NET 2.0 installed on your computer. If it is not detected, the Wizard automatically downloads and installs Microsoft .NET 2.0.

An InstallShield Wizard launches the download.

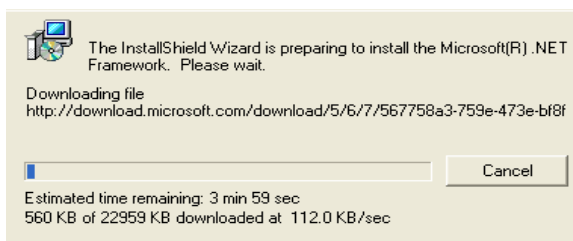


The Microsoft .NET Framework downloads.

The **dotnetfx Module Security Warning** dialog displays. Click **Run**.



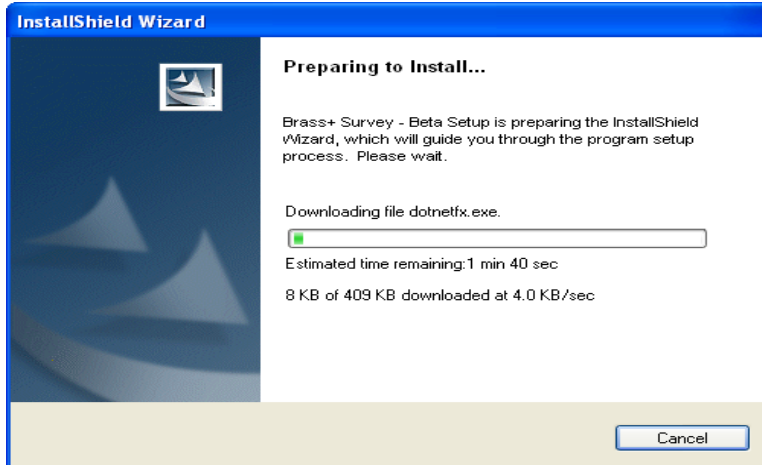
The InstallShield Wizard downloads all of the files need for the installation.



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When the download is complete, the program is ready to install.



When the .NET 2.0 installation is complete, the InstallShield Wizard will automatically continue with the BRASS<sup>plus</sup> software installation.

If you are working in Windows XP, you can proceed with using BRASS<sup>plus</sup>. If you are running Windows 2000, you may be asked to reboot your computer. Reboot if instructed to do so by Windows.

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## LOG ON

After installation, access the BRASS<sup>plus</sup> Data Extraction Tool located on the Windows Start menu at **Start/All Programs/PwC Law Firm Survey/BRASS+**. At initial application start-up, several configuration options are presented (see below) with pre-selected, default values provided in certain instances. This connection and configuration information is needed by the Data Extraction Tool in order to retrieve your firm's time and billing data for BRASS<sup>plus</sup>. If you are unsure about specific settings for your firm, contact your Time and Billing Administrator for guidance.

NOTE: If mappings were applied from the 2011 BRASS<sup>plus</sup> Initial Release or the 2011 BRASS<sup>plus</sup> Mid-Year Release during installation, the configuration options will reflect the values from that release.

Once the log on information is set, it will be saved and applied at subsequent application sessions. SQL Server Authentication users must provide a valid Login ID and Password at each application startup.

### *Database Connection Information*

- **Server** – The name of the server that contains your billing system files appears in this field. If the correct server is not designated, BRASS<sup>plus</sup> will not be able to locate and extract your system data.
- **Database** – The database field contains the time and billing system database name. If the correct database name is not designated, BRASS<sup>plus</sup> will not be able to locate and extract your system data.

### *Connect Using*

- Choose **The Windows account information I use to log on to my computer [Windows Authentication]** if you can access the time and billing system directly from your computer without a SQL Server ID and password. With this option, there is no need to provide an additional Login ID and Password.
- Choose **The SQL Server Login information that was assigned to me by the system administrator [SQL Server Authentication]** if you access the time and billing system using a different user account than your Windows login id.
  - **Login ID** – This is the user account that you use to access your firm's time and billing system. After the first log on, this Login ID is remembered for subsequent application launches.
  - **Password** – This is the password associated with the server login. Type the SQL Server password in the **Password** field. A valid password must be provided every time you log on to BRASS<sup>plus</sup>.

### *Time and Billing System Type*

- **Billing System Type** – The billing system choices are Aderant/CMS, Elite Accrate, and Elite Timerate. The time and billing system type is designated at first log on, and is persisted through subsequent log ons. Do not change the billing system type unless advised to do so by your system administrator.

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**Elite:**

Note: Elite users - Accrate and Timerate refer to the tables used to store timekeeper standard billing rates. Consult your Time and Billing system Administrator for guidance on making the appropriate selection for your firm.

- **Accrate option** – Uses the rate (accrate.astd) found for each timekeeper where survey period date (01/01/2012) falls between a designated range (accrate.adata1 and accrate.adata2).
- **Timerate option** – Uses the rate (timerate.tkrt01) found for each timekeeper where the effective date (timerate.tkeffdate) is closest to (but does not exceed) the survey period date (01/01/2012).
- **Currency Code** – Specify the currency code used in the time and billing system; this value is typically "USD" or "US".
- **Rate Level** – Specify the Rate Level used in Elite Timerate for standard billing rates. This setting is not required for Elite Accrate users.
- **Currates Type** – The data extraction tool requires that the Elite currates table contain a record entry with the transaction type set to the value specified on the login screen (A - Average or D - Daily). If this information in the currates table is missing or not consistent with the login value, the application will not load.
- **Contingency Matter Codes** – Elite users can specify contingency matter codes in order to exclude these matters in the calculation of timekeeper Average Worked Rate and Average Effective Rate. To add a code, click a blank row in the Contingency Code field and type the code. To remove a code, select the row by clicking the selection box to the left of the code and press the **Delete** key.

**Aderant/CMS:**

- **Rate Level CY/PY** – Specify the Rate Levels used for Current Year and Prior Year timekeeper standard billing rates in the CMS system. Current Year is for rates at 1/1/2012, Prior Year is for rates at 1/1/2011.
- **Currency Code** – Specify the currency code used in the time and billing system; this value is typically "USD" or "US".

***Default Settings***

- **Practice Group** – This section designates a time and billing system configuration used by your firm for maintaining practice groups. Select Prac (practice), Dept (department), or Section (Elite only) to properly identify where your firm records the practice group assigned to each timekeeper at 12/31/2011.
- **Year-end Date** – This parameter collects the last day of the year end used for survey data collection. The default value is 12/31/2011, which should accommodate most firms. In cases where your firm's fiscal year ends in November, for example, this value may be adjusted to pull data from that timeframe.

**NOTE:** If you used the extraction tool during the 2011 Initial Release or 2011 Mid-Year Release and adjusted your Year-end Date from the default value, change the default Year-end Data value accordingly upon initial login of the 2012 Initial Release application. Alternatively, you may change or adjustment the Year-end Date value by selecting the Configuration/Billing System option under the Menu Bar after you have logged into the application.

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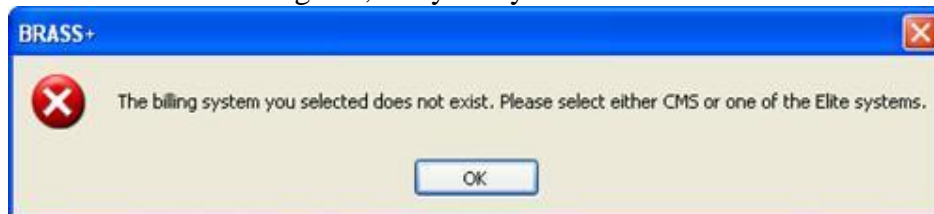
### **Troubleshooting Log On Errors**

An error message may appear if the incorrect server, password, database, or time and billing system is chosen. If one of the following dialog messages display, corrective action must be taken to gain access to the application.



The database error message is generated to correct the following errors:

- **The incorrect Server is designated.** Make sure that the spelling in the **Server** field is correct. If you do not know which Server to designate, ask your system administrator.
- **The incorrect Login ID is used.** Make sure that the spelling in the **Login ID** field is correct. If you do not know which Login ID to designate, ask your system administrator.
- **The incorrect Password is typed.** Make sure that the spelling in the **Password** field is correct. If you do not know which Password to designate, ask your system administrator.
- **The incorrect Connection is used.** Do not select the **Windows Authentication** button if you access the time and billing system using a different Login account than your Windows account. If you do not know which connection to designate, ask your system administrator.



The billing system error message is generated to correct the following error:

- **The Database does not match the Billing System Type.** If you are using a Aderant/CMS time and billing system, choose Aderant/CMS as your **Billing System Type**. If you are using Elite, make sure that either the Elite Accrate or Elite Timerate option is selected. Only Aderant/CMS or Elite time and billing systems may be used with this application.
- **Currates Type missing or incorrect.** Please select a Currates Type that matches your billing system configuration. If you do not know which Currates Type to designate, ask your system administrator.
- **Currency Code missing or incorrect.** Please select a valid currency code that matches your billing system configuration. If you do not know which Currency Code to designate, ask your system administrator.
- **Rate Level missing or incorrect (Aderant/CMS users only).** Please verify that the rate level you have selected exists in your billing system. If you do not know which rate level to specify, ask your system administrator. The default value is rate level 1.