



INSTALL GUIDE:

Updating/Upgrading to Amicus Attorney V+ Advanced Edition

This document contains instructions for firms who are:

[A] Upgrading an existing Organizer or Standalone Edition (any version) to Version V+ Advanced Edition

[B] Upgrading an existing Advanced or Team Edition, Version 4.x or earlier to Version V+ Advanced Edition

[C] Updating an existing Advanced Edition, from an earlier release of Version V to Version V+ (that is, from Release 5.0 or 5.1.x to Release 5.8.x)

[A] [B] [C] Watch for these symbols throughout this guide. They indicate instructions that apply to particular versions only.

CompuLaw Serial Number

TIP: If the firm currently uses a licensed copy of CompuLaw, ensure that you know your Serial Number (required later, in Section 5). To find this number, you can go to the Windows Start menu and choose Programs > Amicus Attorney V > CRD Security Codes.

What to do next

Depending on your current version (as referenced above):

[A] Proceed to Section 1.

[B] Proceed to Section 2.

[C] Proceed to Section 3.

1. Preparing your Organizer or Standalone database(s)

If **[A]**, you must first prepare your Organizer or Standalone database(s).

- 1** Make sure that your current Office is not running. Copy and paste the current version of your database, AMICUS.DB, to your desktop. It is located in the Database folder within your AMICUS* folder.

- 2 If you are running version 2.6.x or higher, start your Amicus Attorney Office and scan the database. If you encounter error messages, call Amicus Attorney Technical Support at 800-472-2289 before proceeding.*

Proceed to Section 3.

2. Preparing your Advanced or Team database

If **[B]**, you must first prepare your Advanced or Team database.

- 1 If any users have the Palm Link installed, they should synchronize their data before upgrading. Failure to do so may result in data loss.*
- 2 Launch your current version of Amicus Administrator. Request the Team Members to log out and deny them access. To do this, choose Users > User Management > Status, highlight the Team Members in the list, click Request Logout and, once all Team Members have logged out, click Deny Access.*
- 3 Exit out of Amicus Administrator. You will be asked to back up your database if you are running version 3.0.x or earlier. Click No.*
- 4 Copy and paste the current version of your database, AMICUS.DB, to your desktop. It is located in [drive]: \TEAM*\DATABASE.*
- 5 Restart Amicus Administrator and unlock all locked items:*
 - In version 4.0.x or later, choose Users > Recovery Functions > Unlock All Data.*
 - In version 3.0.x or earlier, choose Users > Unlock Locked Items.*
- 6 Scan the database:*
 - In version 4.0.x or later, choose Database > Scan Database.*
 - In version 3.0.x or earlier, choose Database > Utilities > Scan Database.*

If you encounter errors, call Amicus Attorney Technical Support at 800-472-2289.
- 7 Now create a second backup of the database by choosing Backup from the Database menu.*
- 8 Exit out of Amicus Administrator.*

If you are running version 3.0.x or earlier, you will be asked to create a backup of your database. You may click No.

Proceed to Section 3.

3. Updating/Upgrading Amicus Administrator

IMPORTANT: Before you update/upgrade any Team Member's copy of Amicus Attorney, the Amicus Administrator application program must be updated/upgraded on the computer that will act as the Team's file server. You do not need to install any other copies of Amicus Administrator, and you do not need to use the CD after this one installation. This process also updates the Setup program that Team Members will need to run in order to update their copies of Amicus Attorney.

- 1** Close any running programs. If other applications are running during the update/upgrade of Amicus Attorney, the process might fail.
- 2** *If [B] [C]:*
 - a** Ensure that all Team Members have exited from their Amicus Attorney Offices.
 - b** Ensure that ALL Team Members have an on-line and logged-out status in Amicus Administrator and are denied access.
 - c** Exit from Amicus Administrator.
- 3** Insert the CD into the CD-ROM drive of the computer that you would like to act as host to the Amicus Administrator program.

NOTE: *If [A] [B], this must be the same computer as currently hosts Amicus Administrator. The Setup program should start automatically. If not, click the Start button and choose Run. In the Run dialog, type the following:*

[CD-ROM drive letter] : \Setup.exe
- 4** In the Amicus Attorney Install Options dialog that appears, select the “Administrator and Network Installer” option and click Start to begin.
- 5** Complete the dialogs as instructed. Note the following points:
 - We recommend that you select the document format(s) suitable for your word processor and/or document automation program to ensure that the appropriate sample templates are copied to the TEAM50 folder. These sample documents are helpful for setting up your own custom Master Document templates. (This does not affect Amicus Assembly—it is relevant only for the standard document templates.)
 - *If [B] AND you selected one or more document format(s) to install sample templates for, you might be prompted to replace each corresponding, existing template with the new sample, or add the new sample as a separate template (with “1” replacing the last character of its name), or ignore the new sample. If you want to process all templates for a format the same way, select the Apply To All option.*
 - *If you wish to use HotDocs 6, please see the Document Assembly Upgrade Notes, available from the Technical Resource Guides section of our website.*
 - You might be asked whether you wish to update your Online Manuals. Note that choosing not to update will prevent any Team Members from updating their local copies.
 - *If you have PCLaw 5.4 or earlier and chose to install the PCLaw link, the installation screen for it will appear. Although you will be prompted to restart your computer for the settings to take effect, DO NOT do so until you have completed the full Amicus Attorney installation.*
- 6** When the installation is complete, you will be notified that the Amicus Attorney files were successfully updated. Click Finish.
- 7** A ReadMe appears. Read the contents of this document carefully.
- 8** If Amicus Administrator resides on the same machine as the Team database files, it will now start automatically.
- 9** *If [B] [C], choose Users > User Management > Status, highlight the Team Members in the list, and click Grant Access.*

What to do next

[A] Each user must first examine his or her customized practice information such as billing categories, file types, activity codes, etc. to see if they need to be synchronized with other Team Members. For details, see “Converting from a Standalone/Organizer Environment”, available from the Technical Resource Guides section of our website. Then **proceed to Section 4**.

[B] **Proceed to Section 4.**

[C] **Proceed to Section 5.**

4. Verifying Team Members

- 1** In Amicus Administrator, choose Users > User Management > Add/ Remove.
- 2** *If [B],* your previous users should already appear in the list. If not, call Amicus Attorney Technical Support at 800-472-2289.
- 3** If you need to add users, click the Add New User button to add each of them. (Be sure to type their name and initials.)

Proceed to Section 5.

5. Updating/Upgrading each Team Member's computer

You do not need the Amicus Attorney CD to update/upgrade Team Members' copies of Amicus Attorney. Complete these steps at the workstation of each person who will be using Amicus Attorney:

- 1** Ensure that the workstation has a drive letter mapped to where Amicus Administrator is installed. If you need instructions, please see the Knowledge Base section of our website.
- 2** *If [A] AND you are upgrading from Version V Organizer:*
 - Copy your database, `AMICUS.DB`, to your desktop. It is located in your `...\AMICUS50\DATABASE` folder.
 - Copy your license file, `ALOCAL.LDF`, to your desktop. It is located in your `...\AMICUS50` folder.
- 3** Exit all open programs.
- 4** *If you are using Palm synchronization, and are planning to install or upgrade the Amicus Attorney-Palm link, turn HotSync Manager off.*
- 5** *If [A] [B],* run `SETUP.EXE`, located in the `...\TEAM50\INSTALL` folder of the mapped drive where Amicus Administrator is installed.
If [C], open the Windows Start menu and choose Programs > Amicus Attorney V. (This ensures that `AA50CHK.EXE` is run, which will automatically check for updated files.)
- 6** *If [A],* a warning appears, reminding you to delete all sample Master Documents that were not altered by you. This is done to avoid having duplicate master documents installed.

If you have already done so, click Yes. Otherwise, click No, open your Office and delete all sample Master Documents that you have not altered to suit your practice. Perform the steps in this section again from the beginning.

- 7 *If [C] AND Amicus Attorney is already installed on the workstation*, an update dialog might appear—select Update Amicus Attorney and click Next.
- 8 Complete the dialogs as instructed. Note the following points:
 - *If an earlier version of Amicus Attorney is not installed on the workstation, or if [A] AND Amicus Attorney is installed on the workstation*, you will be prompted to select the Team Member’s name from the lists provided once the copying of files is complete.
 - If you are not on the list, click “Add me to the Team” (this option is only available if your Amicus Attorney is not already licensed), select a Timekeeper or Non-Timekeeper designation, and enter the Team Member’s name. Click OK.
 - *If [C] AND you currently have the CompuLaw Court Rules Database Engine installed and are updating from Release 5.1.1 or earlier to 5.5 or later*, we recommend that you update this software.
 - *If you are installing/updating the CompuLaw Court Rules Database Engine*, its installer will prompt for a password—type GGV51A45BC3D67AC. Subsequently, the installer will prompt for your CompuLaw Serial Number—if you have a licensed copy of CompuLaw but do not know this number, please contact CompuLaw.
- 9 When the installation is complete, you will be notified that the Amicus Attorney files were successfully updated. Click Finish.
- 10 You will be prompted to start Amicus Attorney. Click Yes.
 - *If [A]*, DO NOT start Amicus Attorney now, as you still need to add the individual users’ information to the Advanced Edition’s Team Database. **Proceed to Section 6.**
 - *If [B] [C]*, click Yes to launch Amicus Attorney. **You are now finished. Enjoy Amicus Attorney V+!** If you wish to update a Secondary Office, proceed to the Appendix.

6. Loading Standalone/Organizer data

If [A], then after each user’s copy of Amicus Attorney has been installed, their information must be added to the Team Database.

- 1 Launch Amicus Administrator if it is not already running.
- 2 From the Database menu, choose Utilities and then Load Standalone. The Select Team Member dialog appears.
- 3 Select a Team Member, click the >> button, and click OK. A dialog appears.
- 4 In the dialog box, navigate up to the TEAM50 folder and then open the Dmpfiles folder. The Dmpfiles folder contains the data files that were generated from each user’s information when you installed their copy of Amicus Attorney. The names of these data files consist of the user’s initials, a unique user number, and the extension DMP (e.g., Hg3.DMP).
- 5 Select a data file and then click Open to add it to the Team Database.

- 6** You may be asked to select the Team Member's name again. If prompted, do so and click OK.
- 7** Verify any similar files by identifying them as being the same or unique.
- 8** Repeat steps 2–7 for each data file in the `Dmpfiles` folder.

IMPORTANT: Be sure that you do not add a Team Member's information more than once.

You are now finished. Enjoy Amicus Attorney V+! If you wish to update a Secondary Office, proceed to the Appendix.

Appendix: Updating a Secondary Office

The Secondary Office provides Team Members with the ability to access their Amicus Attorney information from a remote site. This appendix describes updating your Amicus Attorney Secondary Office software. If you upgrade or update your Primary Office, you must also update your Secondary Office—both locations must have the same release of Amicus Attorney installed (e.g. 5.8.0).

- 1** Insert the Amicus Attorney Installation CD into your Secondary Office computer.
The setup program should start automatically. If it does not, click the Start button and select Run. In the Run dialog, type the following: [CD-ROM drive letter]:\Setup.exe. The Welcome screen appears.
- 2** Select the Secondary Office installation option.
- 3** Follow the prompts to update your Secondary Office.

Once your Secondary Office Team Member is updated, an Open Briefcase dialog appears. If you packed a Briefcase earlier at your updated/upgraded Primary Office, you may proceed to unpack it. Or, you may simply exit.

NOTE: For full details on transferring your data to and from your Primary and Secondary Offices, please consult the Amicus Attorney Online Help, or the *Secondary Office Feature* guide available from the Technical Resource Guides section of our website.

For further information, contact



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