

Improving the Business of Law

Network Installation Guide

Version 8.6 SP-1
August 13, 2001

RealLegal

Practice Manager[™]

Version 8.6 SP-1

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Contents

1 Introduction	1-1
Before You Begin.....	1-1

2 Installing RealLegal Practice Manager.....	2-1
Overview	2-1
Step 1: Network Install.....	2-2
To Start the Network Install	2-2
Collecting information.....	2-5
Choosing configuration options.....	2-10
Installing the files.....	2-25
Finishing the network installation.....	2-26
Step 2: Workstation Install.....	2-27
To Start the Workstation Setup.....	2-27
Configuring Practice Manager on your workstation.....	2-30
Installing the files.....	2-32
Finishing the client installation.....	2-34
Step 3: Initial Login and Site Registration.....	2-35
To Log in to Practice Manager for the First Time	2-35
To Get a Site Key.....	2-39

3 Where to Go from Here	3-1
Implementing Practice Manager	3-1
Getting Help	3-6
Troubleshooting Network and Workstation Install.....	3-8
Error: Cannot attach to database	3-8
Error: Not logged in as dupervisor or administration.....	3-8

Error: Operating system is not 32-bit..... 3-9

Error: Screen resolution is less than 800 x 600 3-10

Error: Operating system is not Microsoft Windows 3-10

Error: SQL Server is not 7.0 or higher 3-11

Error: SQL Server is not installed 3-11

Error: Practice Manager is currently running..... 3-12

Error: SQL connection verification – incorrect login 3-12

Error: SQL connection verification – can’t find server..... 3-13

Error Message: The InstallShield Engine could not be installed. 3-15

Error: And installation support file could not be installed 3-15

Error Connecting to MS SQL Server 3-16

Login Error: Cannot connect to the database for Primary Login 3-16

Glossary.....1

Index.....1

Introduction

Before You Begin

Before you begin installing RealLegal Practice Manager on your network server, there are a few things you need to check:

- 1 Is your network server running Microsoft Windows 98/NT/2K? If not, you cannot install Practice Manager on this server.
- 2 Are you running Microsoft SQL Server 7.0 or higher? If not, you will need to upgrade before installing Practice Manager.
- 3 Are you running Microsoft SQL Server in a clustered environment? If so, you need to be running Microsoft SQL 2000 in order to support the ADO connections to the database in Practice Manager.
- 4 Is Microsoft SQL Server currently running? If not, start Microsoft SQL Server before continuing with the install.
- 5 Are you logged in as the administrator/supervisor for the server? If not, log out and then log in again as the server administrator or supervisor.
- 6 Do you have access to the locations where you want to place the Practice Manager database and files? If not, you will need to get access to that location.
- 7 Have you checked the disk space at the target locations for the Practice Manager database and files to make sure there is enough room to place these files?
- 8 Is Microsoft Internet Explorer 5.0 or higher installed on the computer?
- 9 Is the resolution of the monitor at least 800 x 600?
- 10 If you are upgrading a previous installation of Practice Manager, has everyone stopped running it?

Before Practice Manager can be installed, you will go through a series of screens that are designed to gather information about your firm for initializing the Practice Manager database, as well as determine how your system will be configured for client workstations. This information includes the following:

- 1 General Firm/Organization Information
 - Name (required)
 - Any other names by which the firm/organization is known or is doing business as.
 - Employer identification number
 - Line of business (required)
- 2 Primary Address (required)
- 3 Secondary or Alternate Address (e.g., Mailing Address – optional)
- 4 Primary Contact Information
- 5 Location where the Practice Manager files will be placed.
- 6 Practice Manager Components which are to be installed and enabled.
- 7 Default word processing and e-mail software that will be used.
- 8 The accounting package that Practice Manager will integrate with (optional).
- 9 The path to the Practice Manager executable file as it will appear to the workstations on your network.
- 10 The name you want to use for the Practice Manager database, and the location where you want to place the database.
- 11 The protocol that workstations will use to connect to the Microsoft SQL Server.
- 12 The login name and password for your Microsoft SQL Server.

With the above information in hand, you are ready to begin installing RealLegal Practice Manager!

Installing RealLegal Practice Manager

Overview

There are three basic steps to setting up RealLegal Practice Manager and running it on your network:

- 1 Install the Practice Manager files and database on the server.
- 2 Run the client setup from the network server.
- 3 Start and log in to Practice Manager as the administrator of the network so you can enter the firm's Registration Site Key.

Once completed, you can begin the process of implementing Practice Manager for your firm.

Note

When you first install Practice Manager, it will be in 30-trial mode. This is a fully functioning version of Practice Manager, only it will stop working after 30 days unless you obtain and enter the Registration Site Key mentioned in step 3.

The Registration Site Key is different for each server, and is identified by a Site Code of the computer. Instructions are provided later in this document for identifying your Site Code and contacting RealLegal Client Services to obtain a Site Key.

Step 1: Network Install

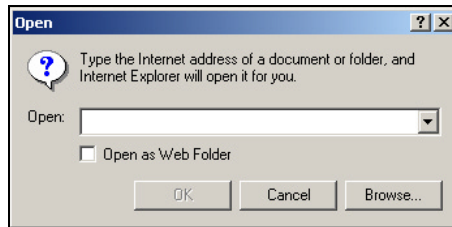
The first step in the installation process is placing the RealLegal Practice Manager files and database on the server, as well as configuring several options specific to your firm/organization. Before starting this process, you should make sure that you have reviewed "Before You Begin" beginning on page 1-1.

To Start the Network Install

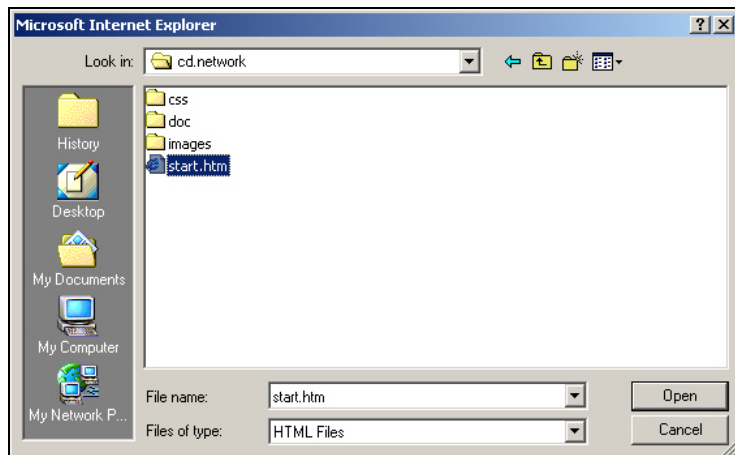
Use the following procedure to start the RealLegal Practice Manager setup and installation process.

- 1 Insert the RealLegal Practice Manager Installation CD. The start.htm file should automatically open in your browser and appear in the browser window..

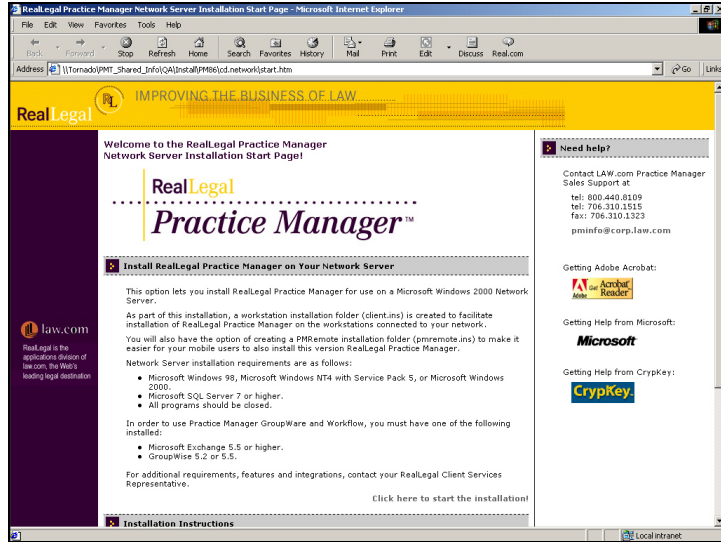
If this page does not open automatically, start Internet Explorer. Choose **File – Open**. The **Open** dialog box appears.



Click browser and located the **start.htm** file on the CD.



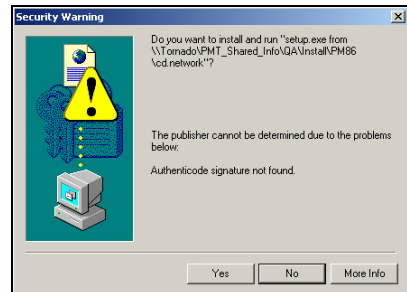
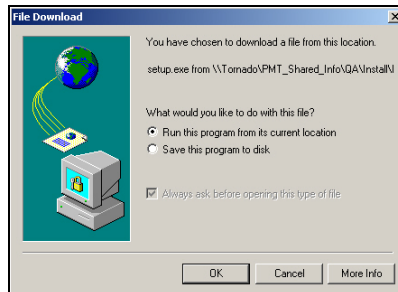
Click **Open**. The page appears in your browser window.



This page provides access to the following:

- The RealLegal Practice Manager Network Setup program
- The RealLegal Practice Manager Network Setup program installation instructions
- Law.com and RealLegal Websites
- Support websites for Adobe Acrobat Reader, Microsoft and CrypKey

2 When ready to begin the install, click once on **Click here to start the installation**. Depending on how your Internet Explorer server is configured one or both of the following messages may appear:

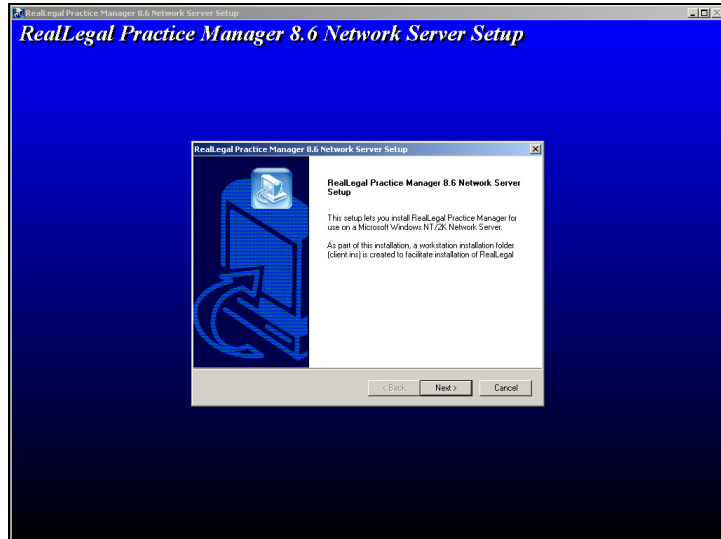


Click **OK** and/or **Yes** as needed.

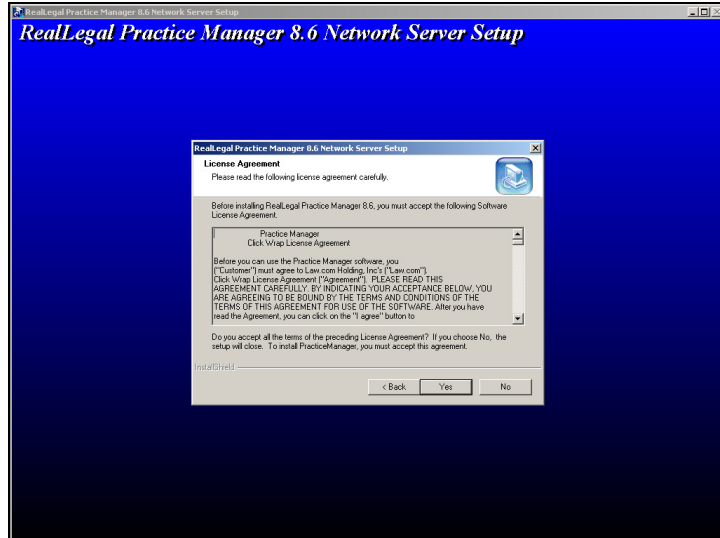
The **InstallShield Wizard** prepares the RealLegal Practice Manager files for installation.



When finished, the **RealLegal Practice Manager Setup Welcome** window appears.

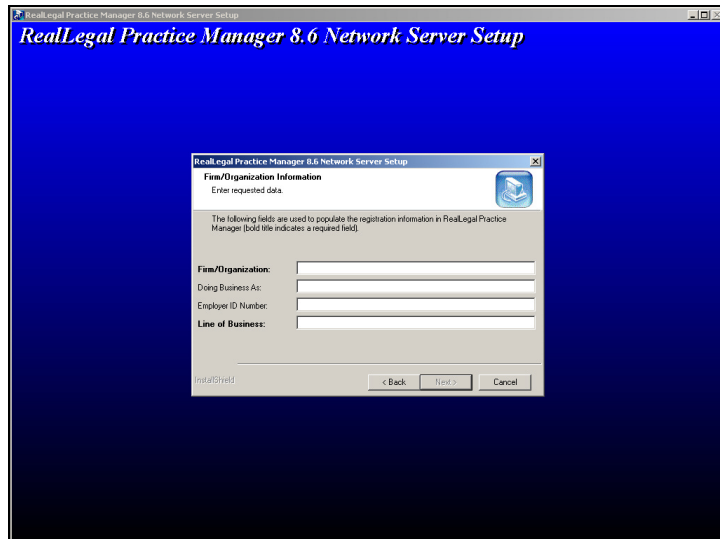


- 3 Click **Next**. The **RealLegal License End User License Agreement (EULA)** appears.

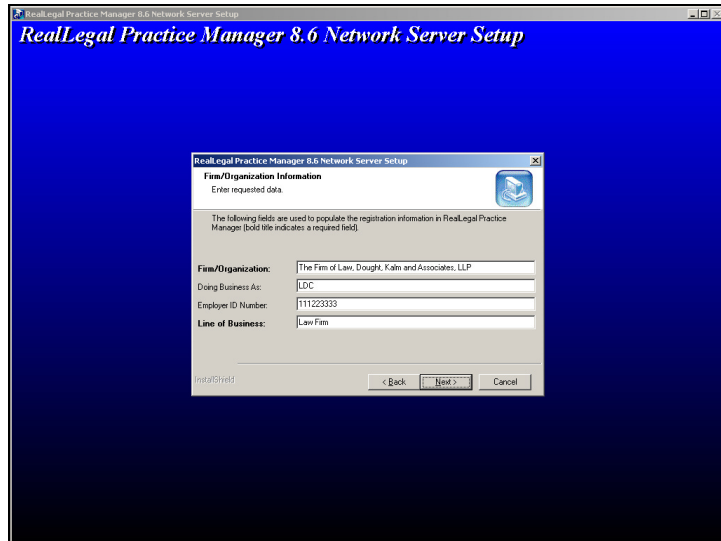


Collecting information...

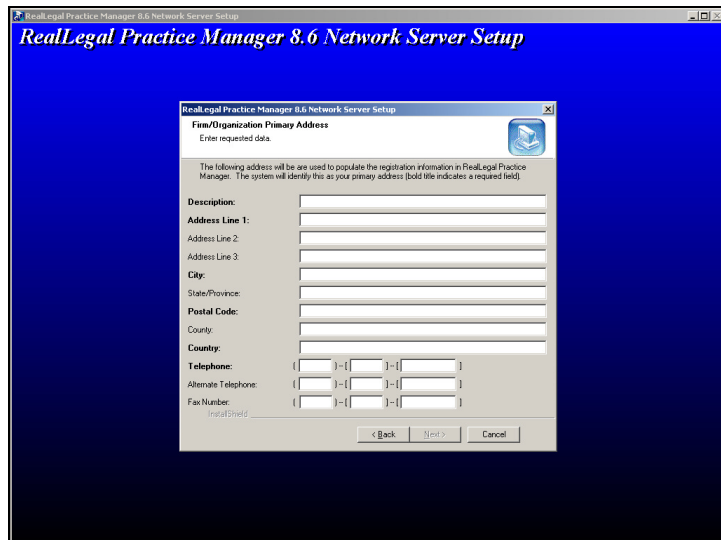
- 4 Click **Yes** to accept the agreement. The **Firm/Organization Details** window appears.



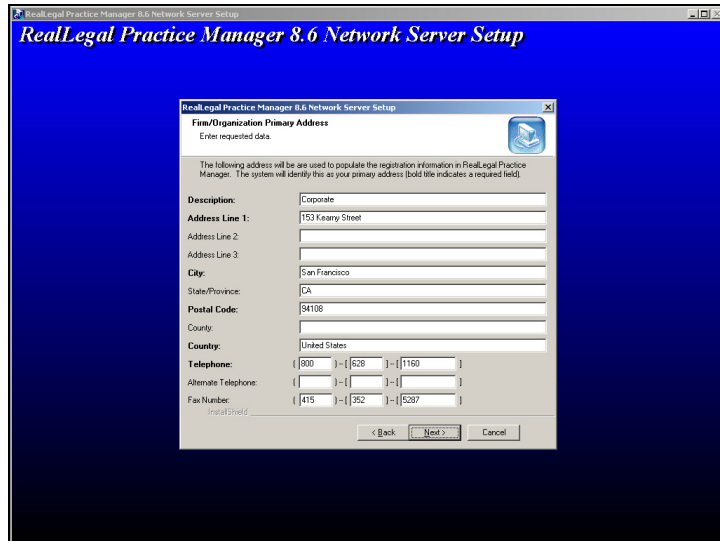
- 5 Complete the fields on the screen.



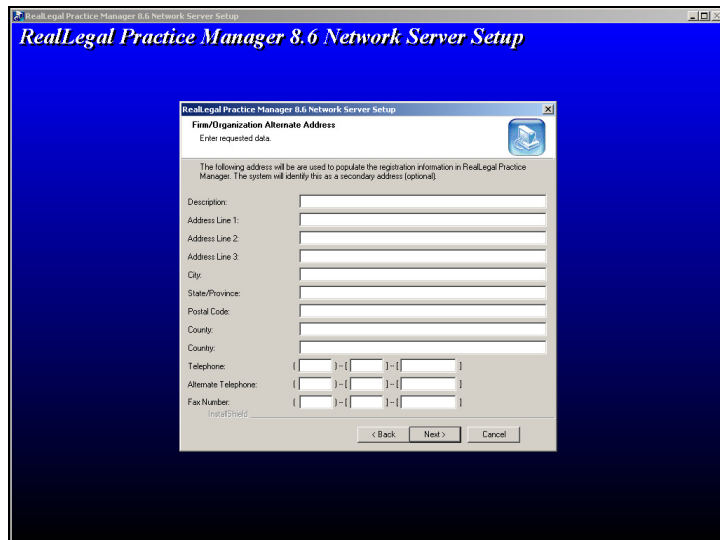
- 6 When finished, click **Next**. The **Primary Address** window appears.



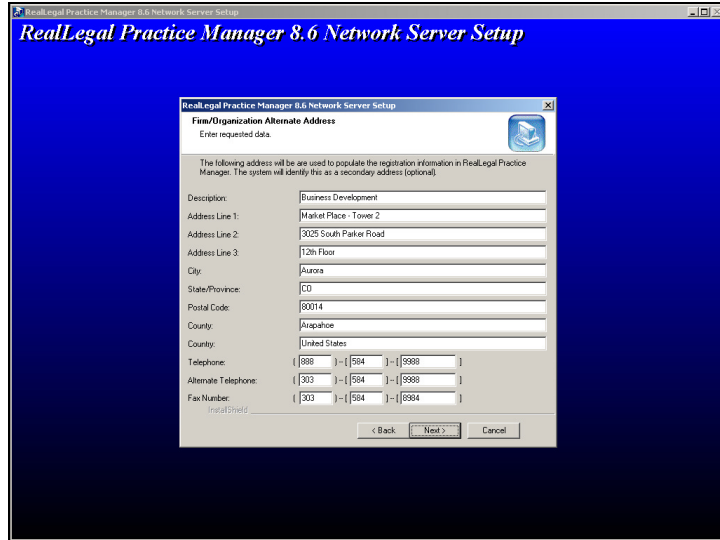
- Complete the fields on the screen.



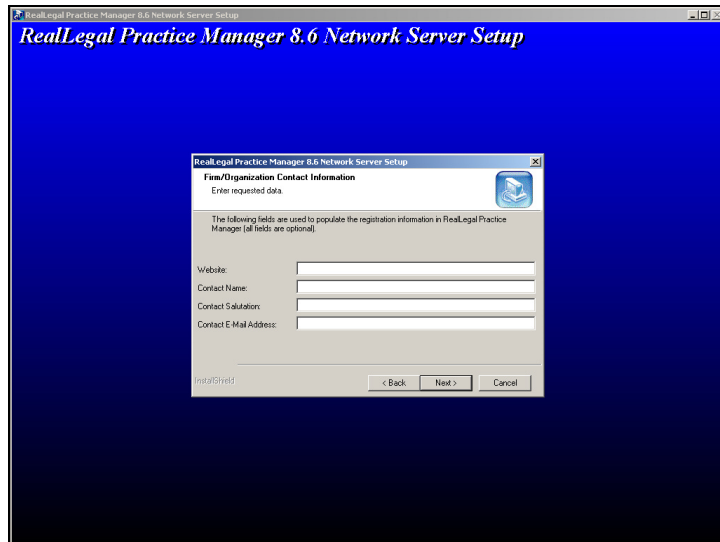
- When finished, click **Next**. The **Alternate Address** window appears.



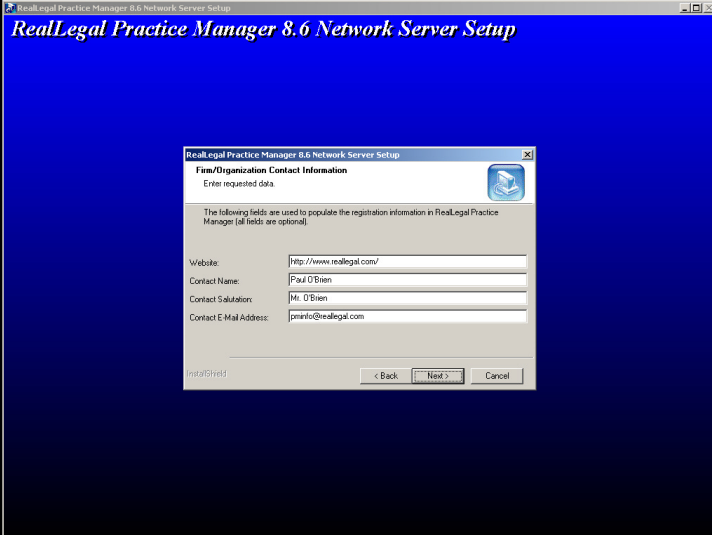
- Complete the fields on the screen, as needed.



- When finished, click **Next**. The **Additional Information** window appears.



11 Complete the fields on the screen.

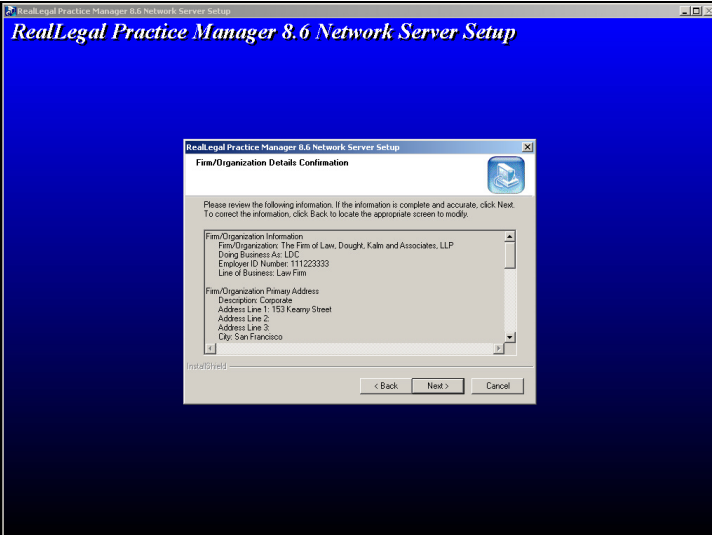


The screenshot shows the "RealLegal Practice Manager 8.6 Network Server Setup" window. The main title bar reads "RealLegal Practice Manager 8.6 Network Server Setup" and the window content has a blue background with the text "RealLegal Practice Manager 8.6 Network Server Setup". A smaller dialog box titled "RealLegal Practice Manager 8.6 Network Server Setup" is overlaid on top. This dialog box has the title "Firm/Organization Contact Information" and the instruction "Enter requested data." Below this, it states: "The following fields are used to populate the registration information in RealLegal Practice Manager (all fields are optional)." The form contains the following fields:

- Website:
- Contact Name:
- Contact Salutation:
- Contact E-Mail Address:

At the bottom of the dialog box, there are three buttons: "< Back", "Next >", and "Cancel".

12 When finished, click **Next**. The **Firm/Organization Details Confirmation** window appears.



The screenshot shows the "RealLegal Practice Manager 8.6 Network Server Setup" window. The main title bar reads "RealLegal Practice Manager 8.6 Network Server Setup" and the window content has a blue background with the text "RealLegal Practice Manager 8.6 Network Server Setup". A smaller dialog box titled "RealLegal Practice Manager 8.6 Network Server Setup" is overlaid on top. This dialog box has the title "Firm/Organization Details Confirmation" and the instruction "Please review the following information. If the information is complete and accurate, click Next. To correct the information, click Back to locate the appropriate screen to modify." Below this, the information is displayed in a list box:

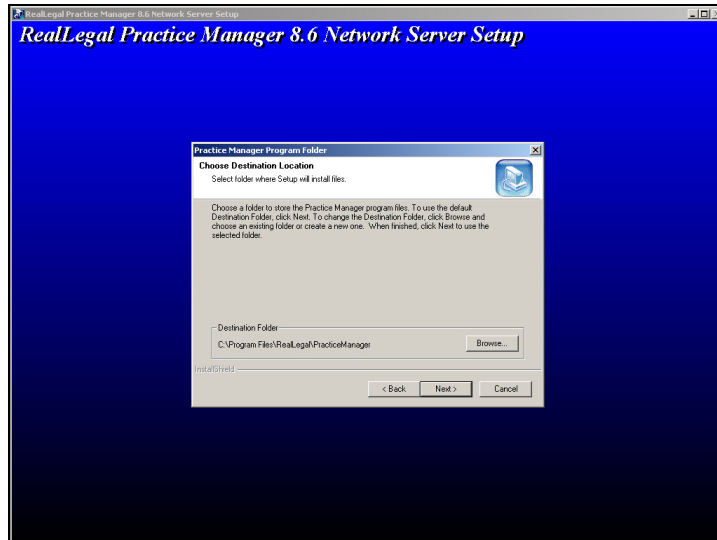
- Firm/Organization Information
 - Firm/Organization: The Firm of Law, Dought, Kalm and Associates, LLP
 - Doing Business As: LDC
 - Employee ID Number: 111223333
 - Line of Business: Law Firm
- Firm/Organization Primary Address
 - Description: Corporate
 - Address Line 1: 153 Kearny Street
 - Address Line 2:
 - Address Line 3:
 - City: San Francisco

At the bottom of the dialog box, there are three buttons: "< Back", "Next >", and "Cancel".

- If the information is not correct, click **Back** until the appropriate window appears, and correct the information as needed.
- If the information is correct, click **Next**.

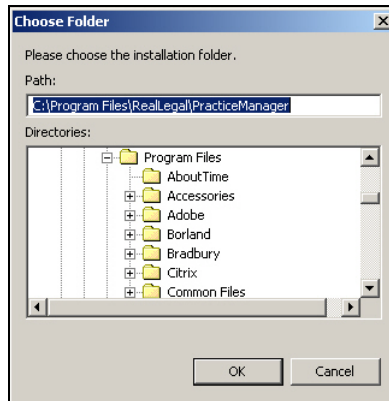
Choosing configuration options...

The **Practice Manager Program Folder** window appears.



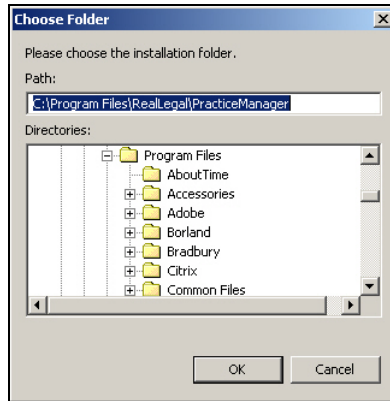
13 Choose a location where you want to place the Practice Manager program files.

- To accept the default folder location, click **Next**.
- To browse to an existing folder, click **Browse**. The **Choose Folder** dialog box appears.

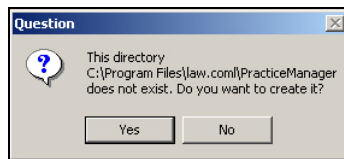


Choose an existing folder, and click **Next**.

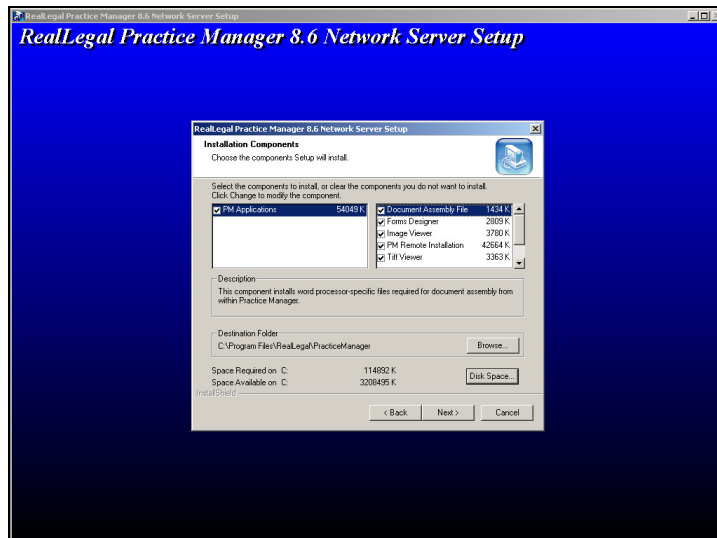
- To create a new folder, click **Browse**. The **Choose Folder** dialog box appears, click **OK** and then click **Next**.



Enter the full path and folder name in the **Path** field, click **OK** and then click **Next**. If the folder does not exist, a confirmation window appears.



Click **Yes** to create the folder. The **Practice Manager Installation Components** window appears.

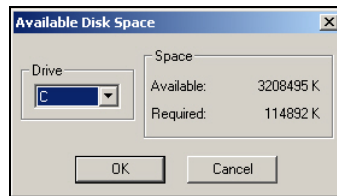


14 Choose the Practice Manager components to install.

- Checking a component includes it in the installation.
- Unchecking a component removes it from the installation.

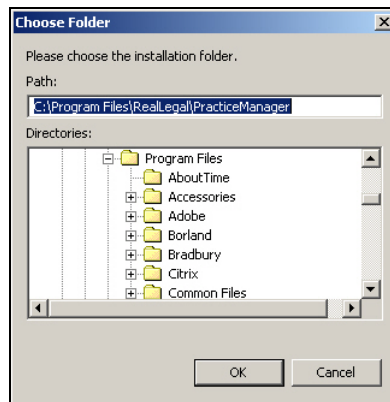
Because checking and unchecking installation components can change the amount of disk space required for the installation, you can check the space or change to a folder on a drive with more space.

- To check the disk space, click the **Disk Space** button. The **Available Disk Space** dialog box appears.



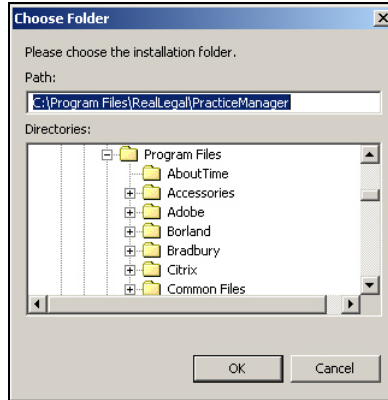
Click OK to return to the **Practice Manager Installation Components** window.

- To change the destination folders and/or drive for the Practice Manager files, click **Browse**. The **Choose Folder** dialog box appears.



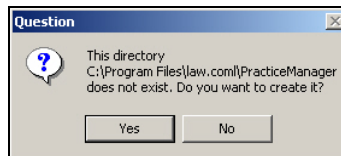
- To use an existing folder, browse to that folder, click **OK**.

- To create a new folder, click **Browse**.



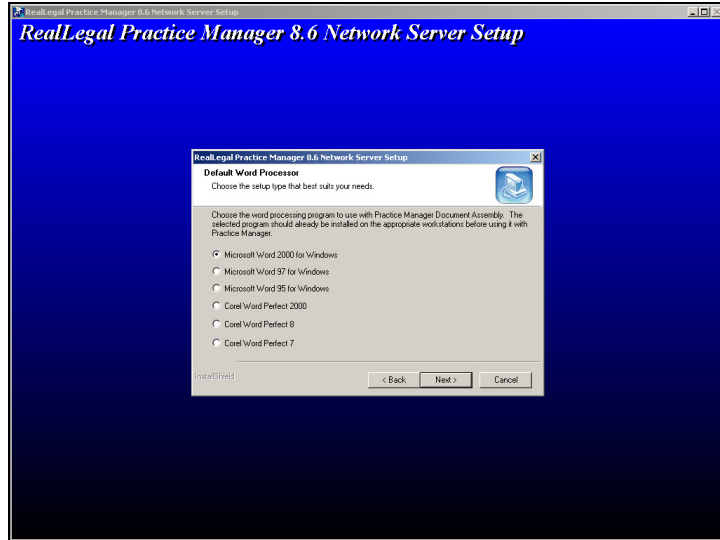
Enter the full path and folder name in the **Path** field, and click **Next**.

If the folder does not exist, a confirmation window appears.

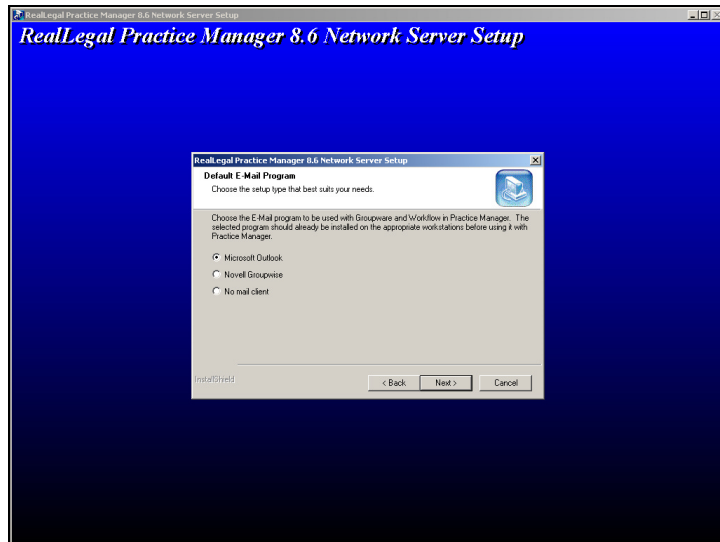


Click **Yes** to create the folder. The **Practice Manager Installation Components** window appears.

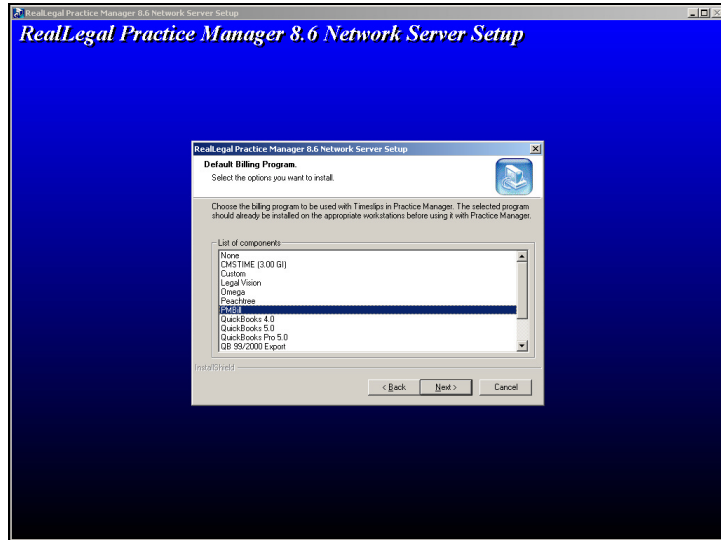
- 15 When finished, click **Next**. The **Default Word Processor** window appears.



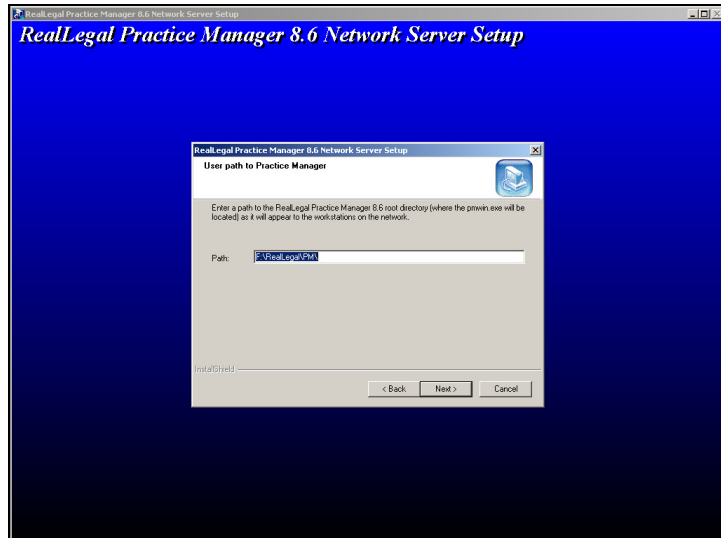
- 16 Select the Word Processor your firm will use for generating documents with Practice Manager, and click **Next**. The **Default E-Mail Program** window appears.



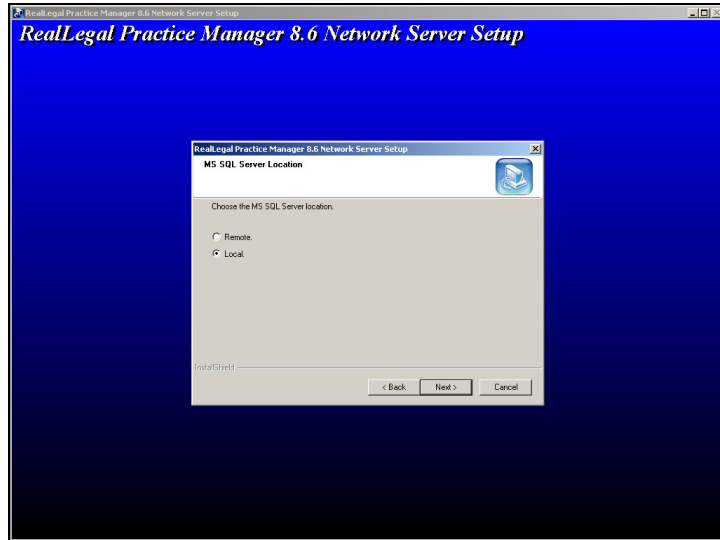
- 17 Select the E-Mail Program your firm will use with Groupware and Workflow functionality in Practice Manager, and click **Next**. The **Default Billing Program** window appears.



- 18 If Practice Manager will be integrated with your firm's billing program, select that billing from the list, and click **Next**. The **Local Path** window appears.

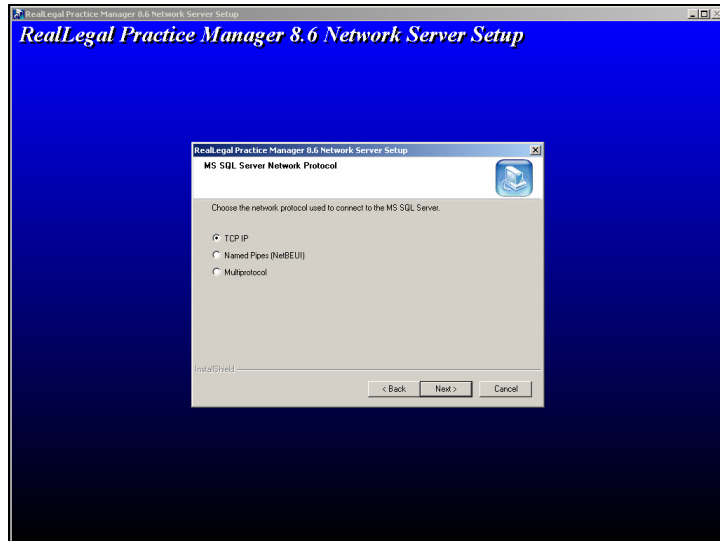


- 19 Enter the path to the Practice Manager executable file as it will appear to workstations on your network (e.g., F:\apps\reallegal\pmwin\, P:\, etc.), and click **Next**. The **MS SQL Server Location** window appears.

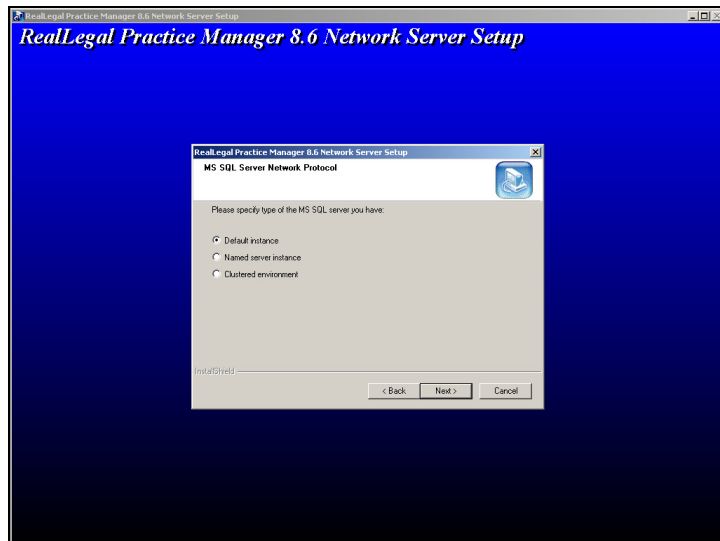


- **LOCAL:** If the SQL Server is running on the same computer where you are installing Practice Manager, choose **Local** and click **Next**.
- **REMOTE:** If the SQL Server is running on a computer other than on the one where you are installing Practice Manager, choose **Remote** and click **Next**.

The **SQL Server Network Protocol** window appears.

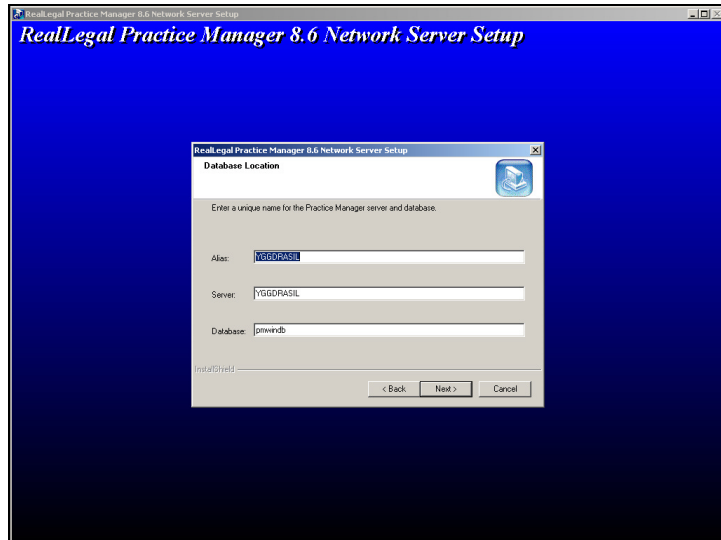


- 20** Choose the protocol for connecting to the MS SQL Server, and click **Next**. The **MSSQL Server Type** window appears:

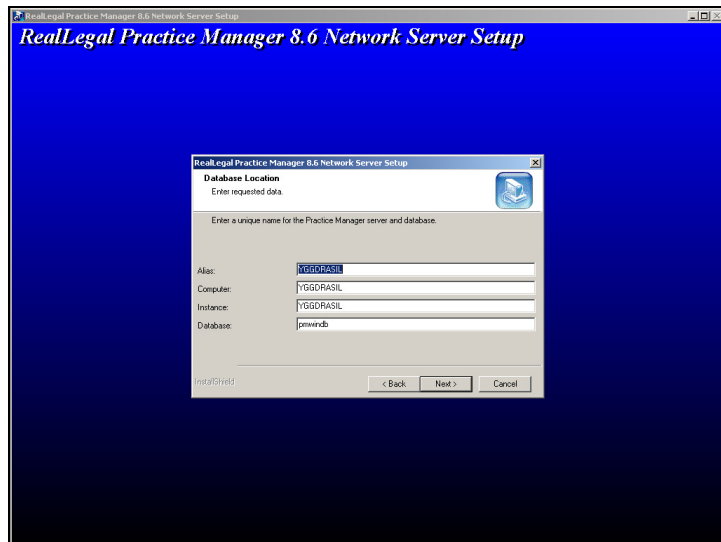


- 21** Choose the MS SQL Server Type you are using, and click **Next**. The **Database Name** window appears, the fields determined by the type of MS SQL Server you selected.

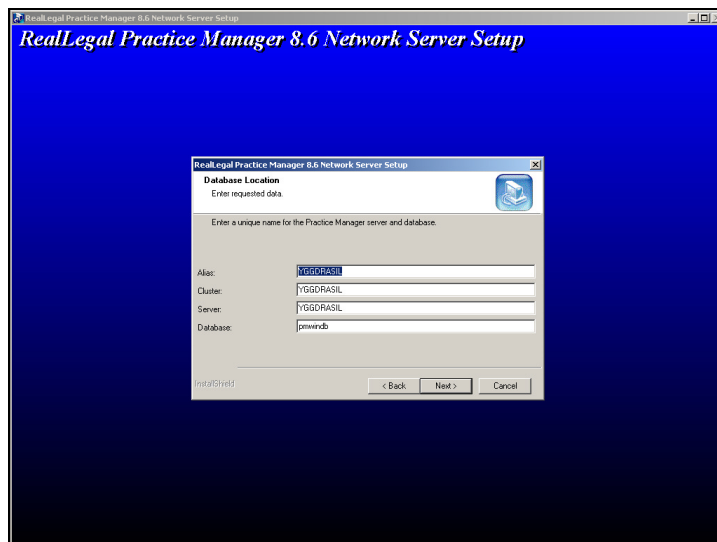
- If you choose **Default instance**, the **Database Name** window appears as follows:



- If you choose **Named server instance**, the **Database Name** window appears as follows:



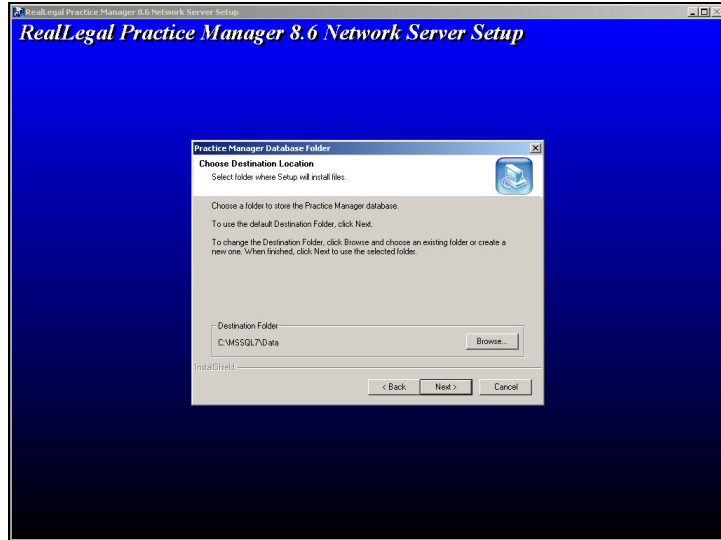
- If you choose **Clustered environment**, the **Database Name** window appears as follows:



22 Complete the fields on the screen.

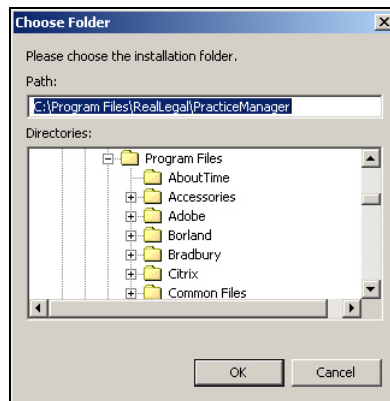
- If you chose **Default instance**, enter an **Alias**, the **Server** name and a unique name for the **Database**.
- If you chose **Named server instance**, enter an **Alias**, the **Computer** name, **Instance Name** and a unique name for the **Database**.
- If you chose **Clustered environment**, enter an **Alias**, the **Cluster** name, **Server Name** and a unique name for the **Database**.

Click **Next**. The **Database Folder** window appears.



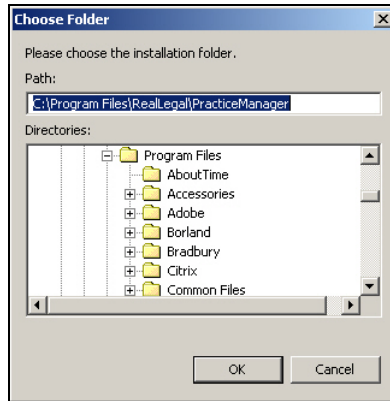
23 Choose a location for the Practice Manager database.

- To accept the default folder location, click **Next**.
- To browse to an existing folder, click **Browse**. The **Choose Folder** dialog box appears.

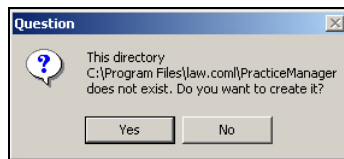


Choose an existing folder, and click **Next**.

- To create a new folder, click **Browse**. The **Choose Folder** dialog box appears, click **OK** and then click **Next**.

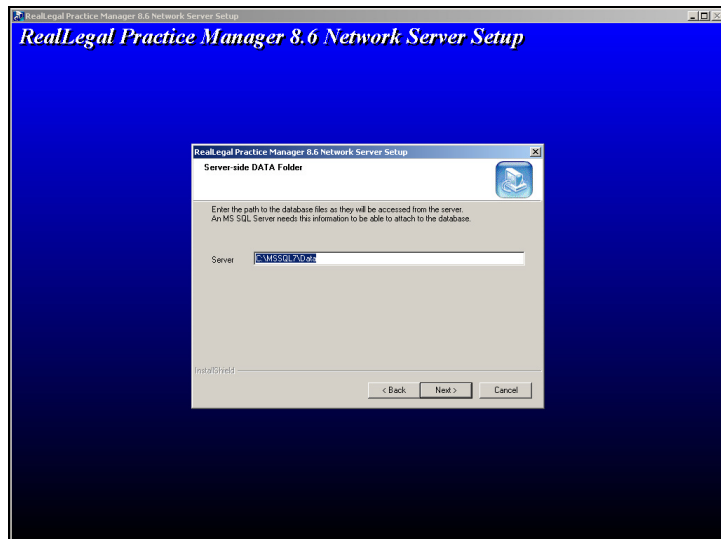


Enter the full path and folder name in the **Path** field, click **OK** and then click **Next**. If the folder does not exist, a confirmation window appears.



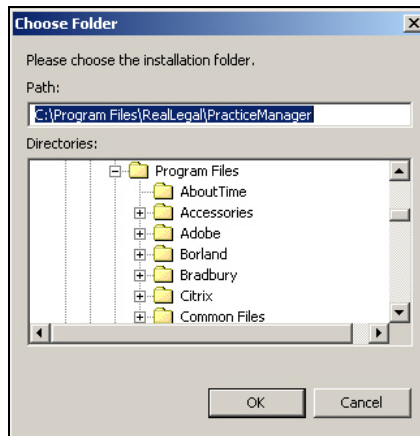
Click **Yes** to create the folder.

- **REMOTE:** If this is a remote installation, the **Server-side Data Folder** window appears.



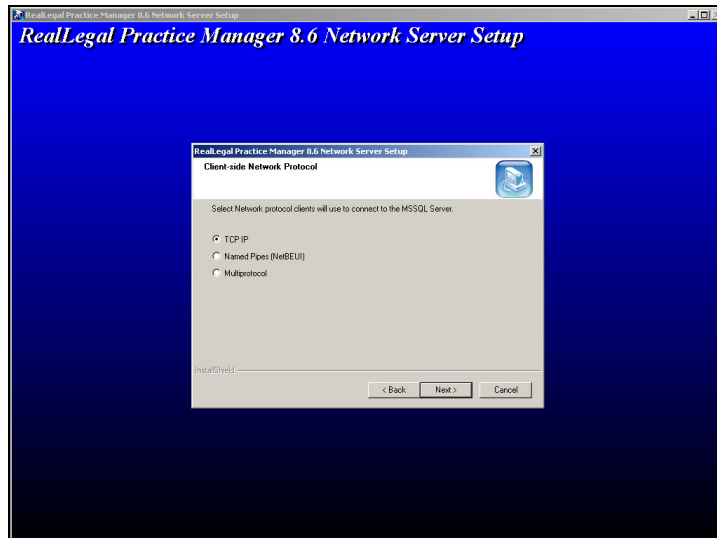
This is the folder where the data will reside on the remote server as it appears to the local server.

- To accept the default folder location, click **Next**.
- To browse to an existing folder, click **Browse**. The **Choose Folder** dialog box appears.

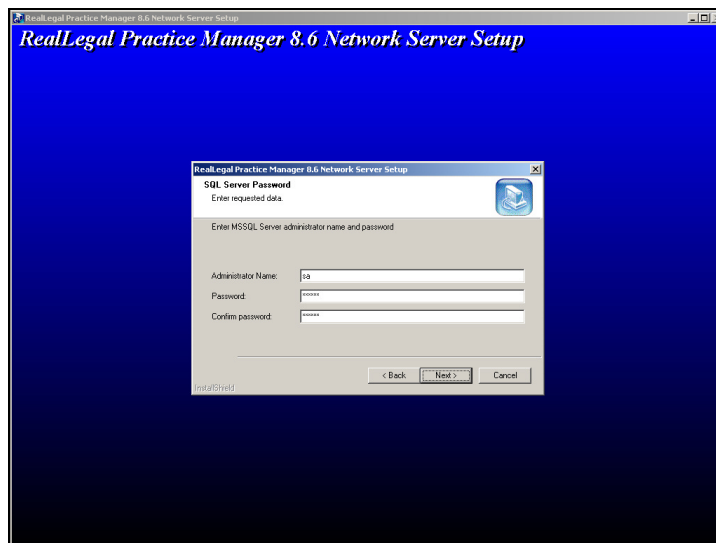


Choose an existing folder, and click **Next**.

The **Client-side Network Protocol** window appears.



- 24 From the list, choose the protocol that workstations will use for connecting to the Microsoft SQL Server, and click **Next**. The SQL Server Password window appears.

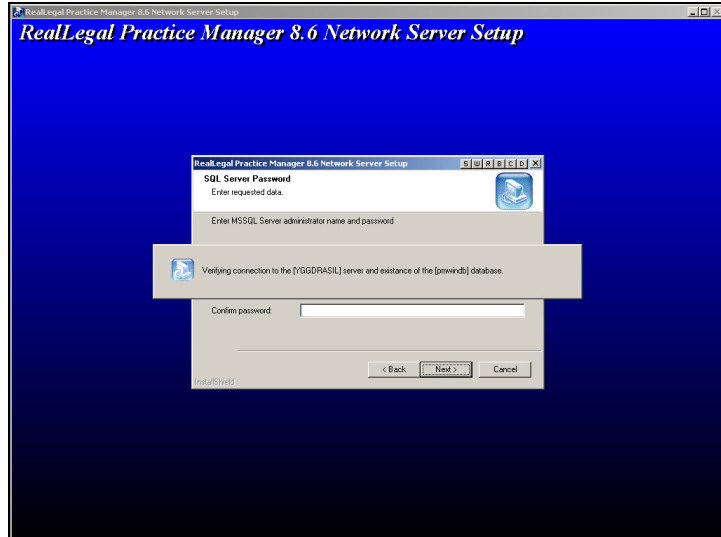


- 25 Enter the administrator login name and password for connecting to Microsoft SQL Server.

Note

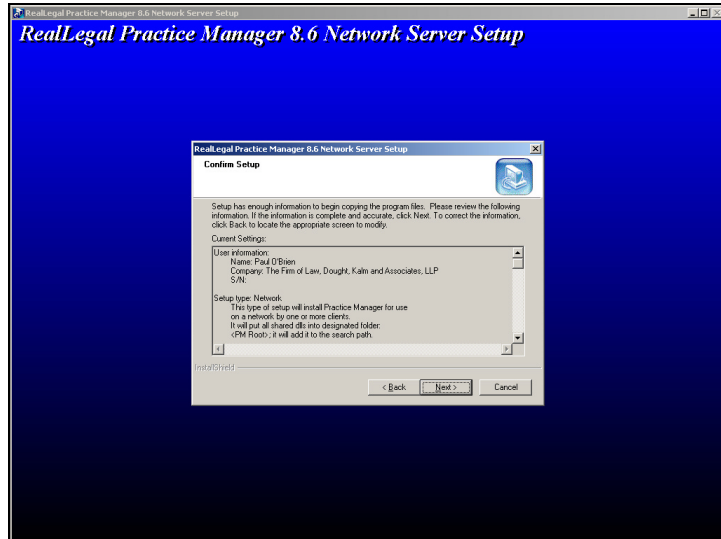
Be sure to keep track of this username and password. You will need it to log in to RealLegal Practice Manager and setup user accounts.

- 26 Click **Next**. The RealLegal Practice Manager Setup program will test the connection to Microsoft SQL Server.



If error occur, a message window appears identifying the error and possible reasons for it occurring. Correct the condition before proceeding with the install.

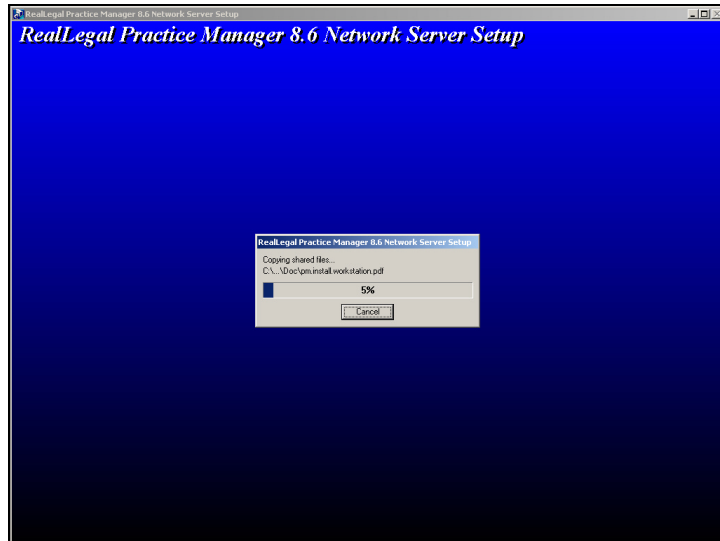
Otherwise, the the **Confirm Setup** window appears.



If the information is not correct, click **Back** until the appropriate window appears, and correct the information as needed.

Installing the files...

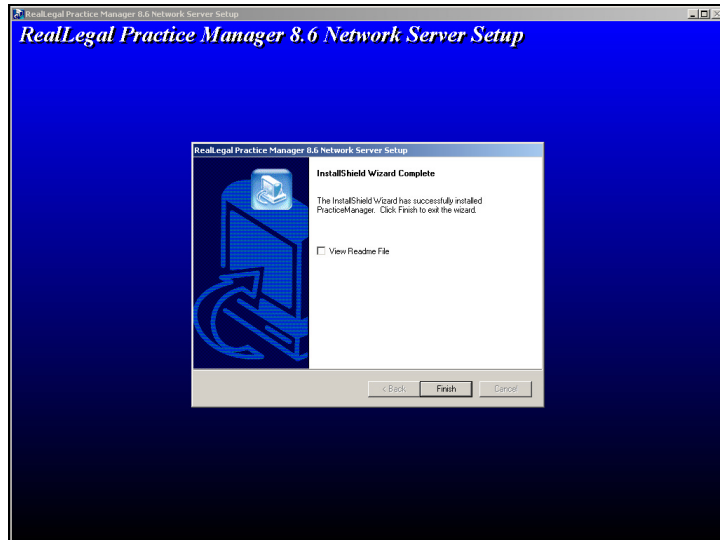
- 27 When ready to begin installing the files, click **Next**. A progress bar appears while the Practice Manager files are installed.



After all files have been installed on the server, the Network Server Installation program will connect to the database and carry out a series of scripts for updating the database with the information you entered. A series of messages and DOS application boxes will appear on the screen.

Finishing the network installation...

If no errors occur, the **Completion** window appears.



- 28** Click **Finish**. The **Practice Manager Setup** window closes. The **Network Installation Start Page** should still be active in your browser window.

About the Readme File

The readme.txt file contains information which was not available at the time the online books were produced. We strongly urge you to read this file for any last minute updates or changes.

*If you want to view the readme file, check **View ReadMe** BEFORE clicking **Finish**. The file will open in the Windows Notepad.*

It can also be accessed by opening the readme.txt file in the Practice Manager folder on your server.

This same readme file will be available to your users when they install Practice Manager on their desktops. If you want to add information for each of them to read, you can do so now and then save the file.

- 29** When you are finished, close the **Network Installation Start Page** and proceed to "Step 2: Workstation Install" beginning on page 2-27.

Step 2: Workstation Install

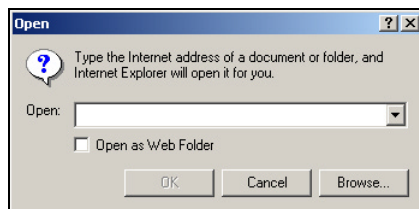
The second step in the installation process is configuring a workstation to run the server based RealLegal Practice Manager, and connect to the database.

This process will need to be carried out on each workstation in your office, and should only be carried out after you have installed Practice Manager on the Network.

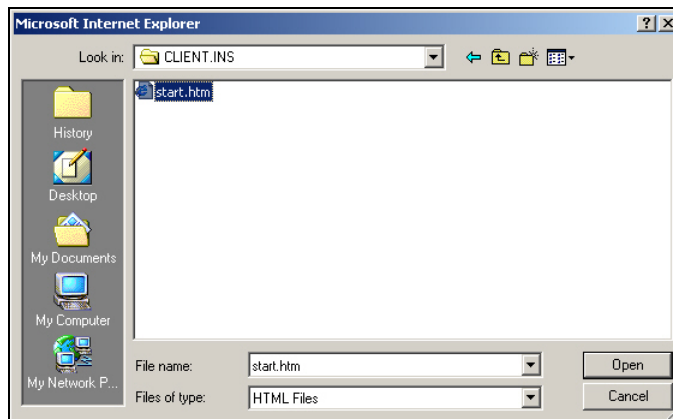
To Start the Workstation Setup

Use the following procedure to start the RealLegal Practice Manager Workstation Setup process.

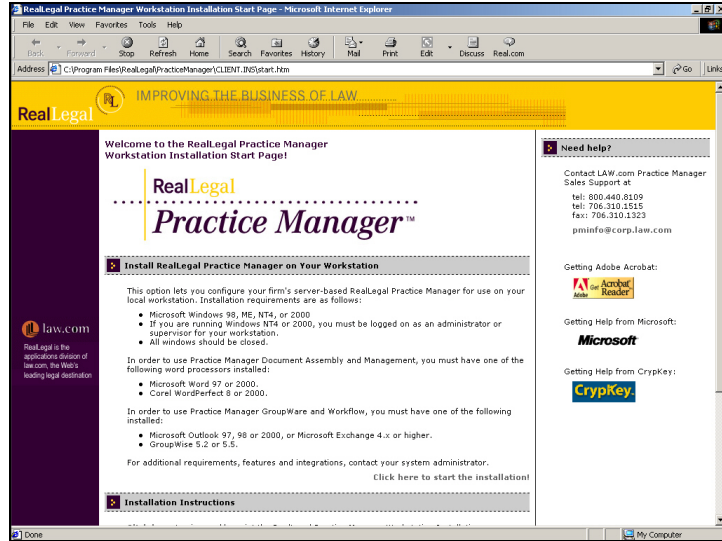
- 1 Start Microsoft Internet Explorer.
- 2 Choose **File – Open**. The Open dialog box appears.



- 3 Click Browse. The browse window appears.



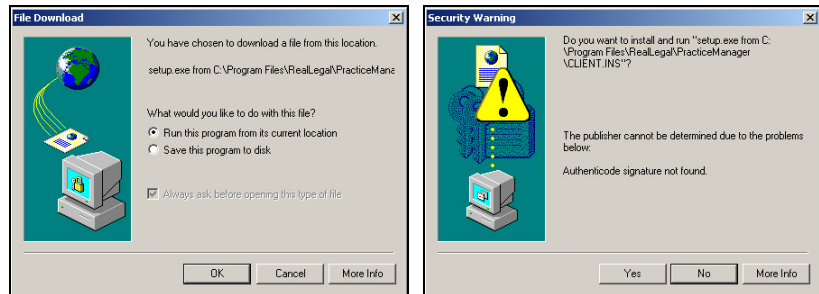
- 4 Locate the **client.ins** folder inside of the Practice Manager folder on your network server (e.g., f:\apps\reallegal\pmwin\client.ins\) and locate the start.htm file. The **RealLegal Practice Manager Workstation Setup** page appears.



This page provides access to the following:

- The RealLegal Practice Manager Workstation Setup program
- The RealLegal Practice Manager Network Setup program installation instructions
- Law.com and RealLegal Websites
- Support websites for Adobe Acrobat Reader, Microsoft and CrypKey

5 When ready to begin the install, click once on **Click here to start the installation**. Depending on how your Internet Explorer server is configured one or both of the following messages may appear:

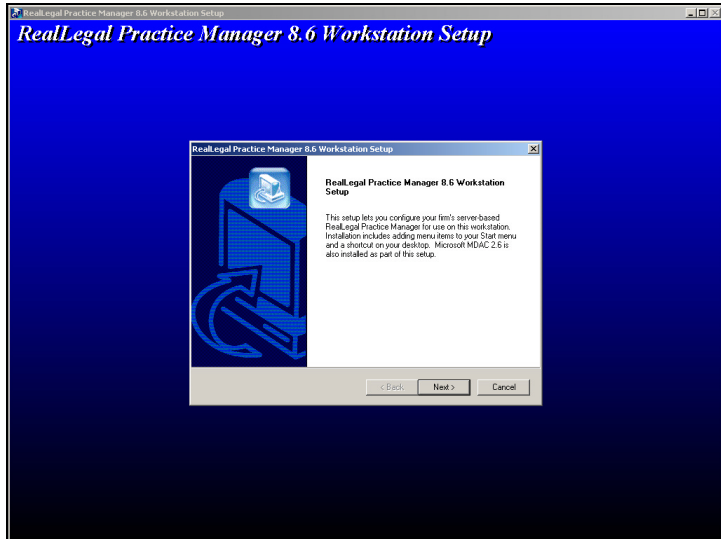


Click **OK** and/or **Yes** as needed.

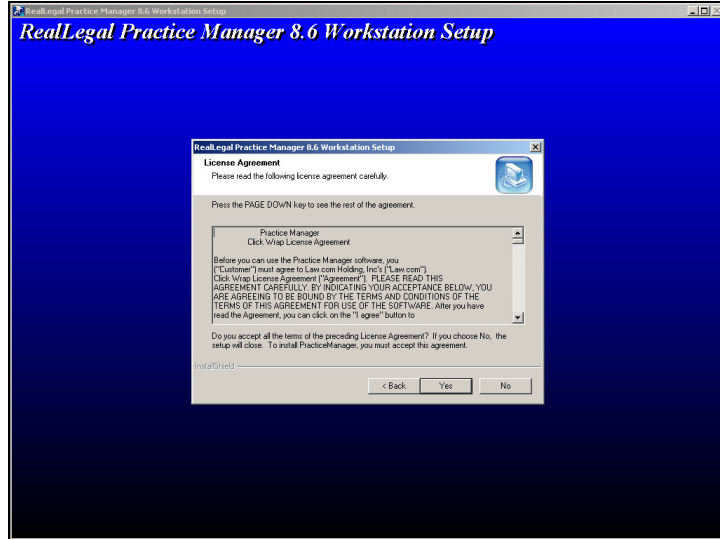
The InstallShield Wizard prepares the RealLegal Practice Manager files for installation.



When finished, the RealLegal Practice Manager Setup Welcome window appears.

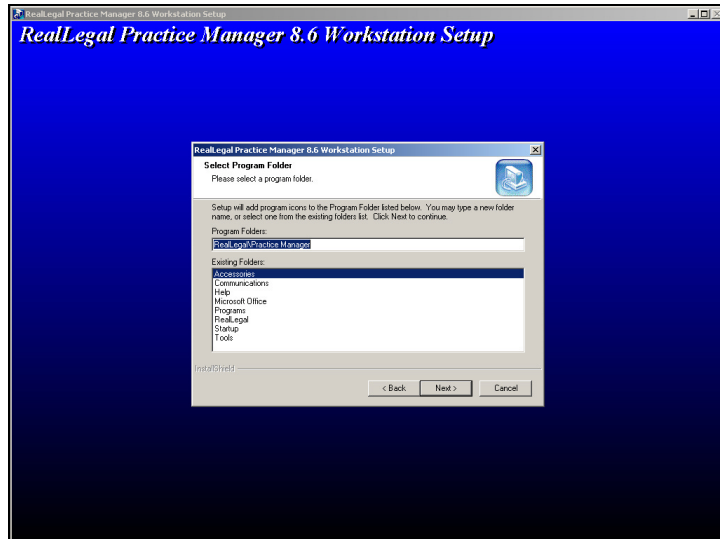


- Click Next. The RealLegal License End User License Agreement (EULA) appears.

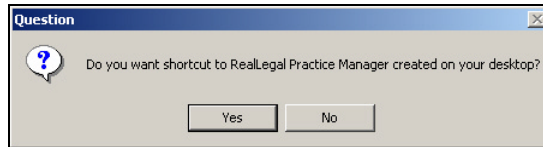


Configuring Practice Manager on your workstation...

- Click Yes to accept the agreement. The Select Program Folder window appears.

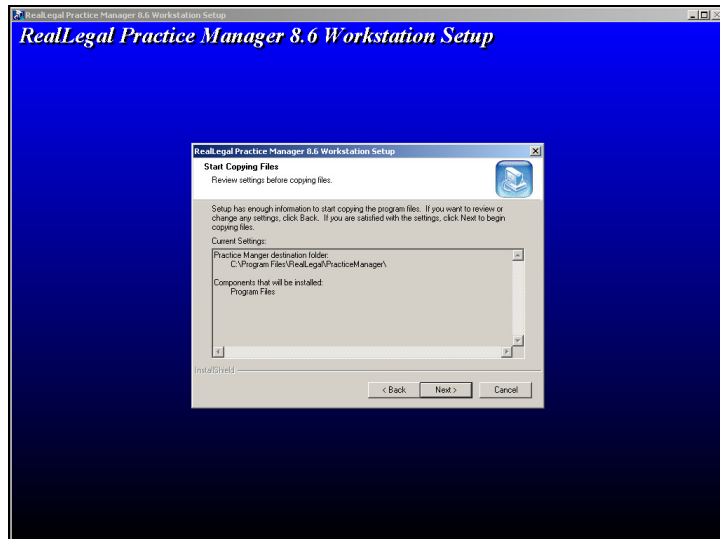


- 8 Click **Next**. A prompt appears that asks if you want to place a shortcut to RealLegal Practice Manager icon on your desktop.



- To place the shortcut on your desktop, click **Yes**.
- To skip placing the shortcut on your desktop, click **No**.

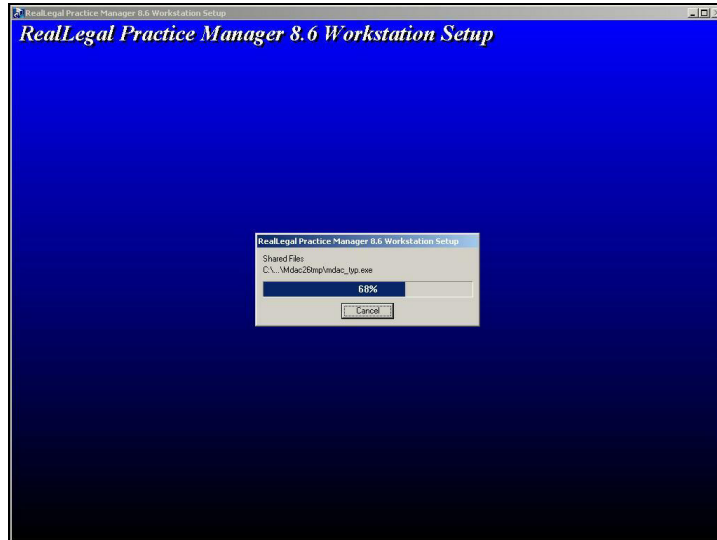
The **Confirm Setup** window appears.



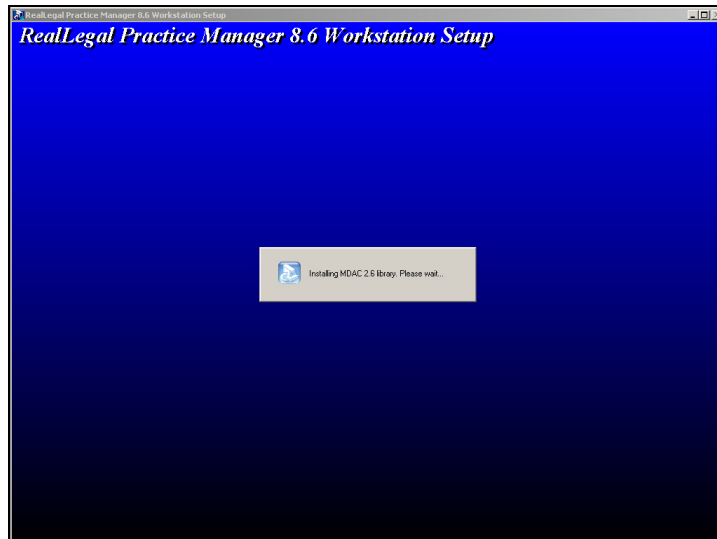
If the information is not correct, click **Back** until the appropriate window appears, and correct the information as needed.

Installing the files...

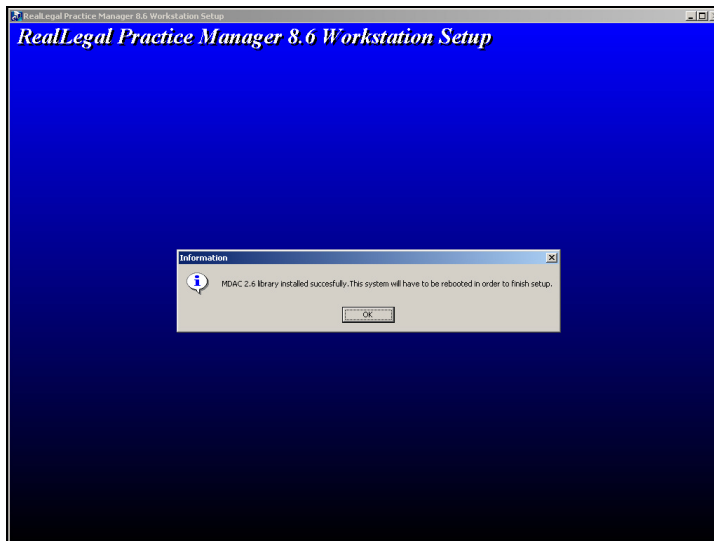
- 9 When ready to begin installing the files, click **Next**. A progress bar appears while the Practice Manager files are installed.



When finished, the MDAC 2.6 installation begins if you do not have the latest version of MDAC installed, and a progress bar appears.



When MDAC 2.6 installation has been completed, a message appears advising you that you will need to reboot your PC before you can run Practice Manager.

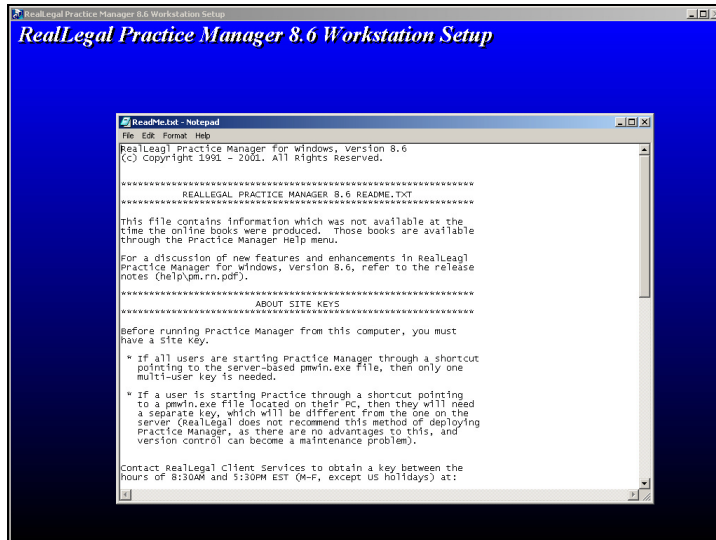


About MDAC

"The Microsoft® Data Access Components (MDAC) are the key technologies that enable Universal Data Access. Data-driven client/server applications deployed over the Web or a LAN can use these components to easily integrate information from a variety of sources, both relational (SQL) and nonrelational. These components include Microsoft® ActiveX® Data Objects (ADO), OLE DB, and Open Database Connectivity (ODBC)." From <http://www.microsoft.com/data/whatcom.htm>.

Finishing the client installation...

If no errors occur, the **Completion** window and ReadMe file appears.



About the Readme File

The readme.txt file contains information which was not available at the time the online books were produced. We strongly urge you to read this file for any last minute updates or changes.

This file may also contain information your System Administrator wants you to read before proceeding with using Practice Manager.

- 10 When finished with the **ReadMe** file, close the Notepad window and switch back to the **RealLegal Practice Manager Workstation Setup** window.
- 11 Choose the restart option you want.
 - Click **Yes** to restart immediately (recommended), then click **Finish**. All active programs and windows, including the **PMRemote Setup** window and the **PMRemote Installation Start Page**, are closed. The computer restarts.
 - Click **No** to restart later, then click **Finish**.

Do not attempt to run Practice Manager without first restarting your computer, as this could produce unexpected results.

The **Practice Manager Setup** window closes.

12 Switch to the **PMRemote Installation Start Page**.

13 When finished, close this window as well. Proceed to "Step 3: Initial Login" beginning on page 2-35.

Step 3: Initial Login and Site Registration

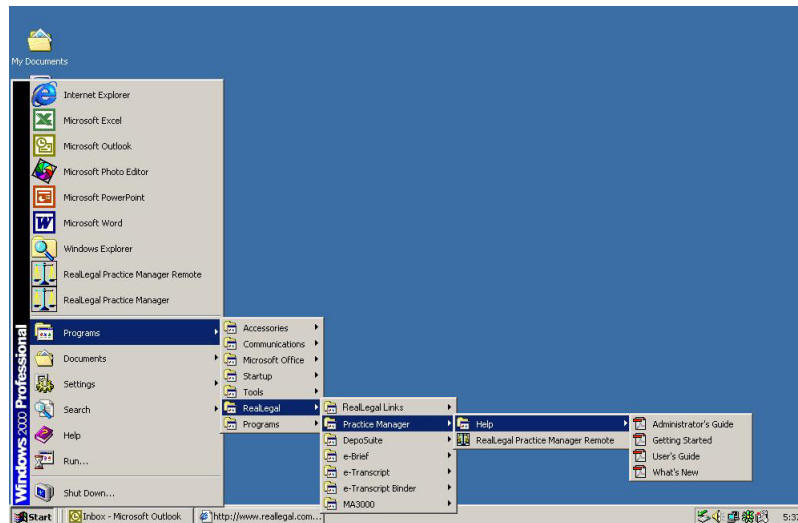
After you have completed the network server and client workstation installations, you need to login once and enter your firms Site Key so that others can log in and use RealLegal Practice Manager.

To Log in to Practice Manager for the First Time

Use the following procedure only when logging into Practice Manager for the first time.

1 Locate and execute the Practice Manager shortcut.

Or in the program folder you selected...



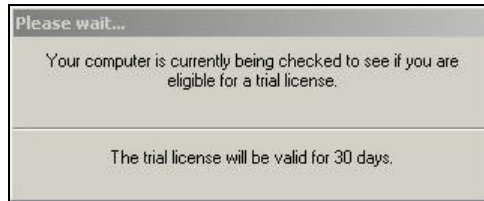
It will be located either on the Start Menu...



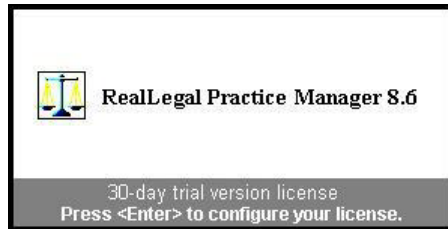
Or on the desktop...



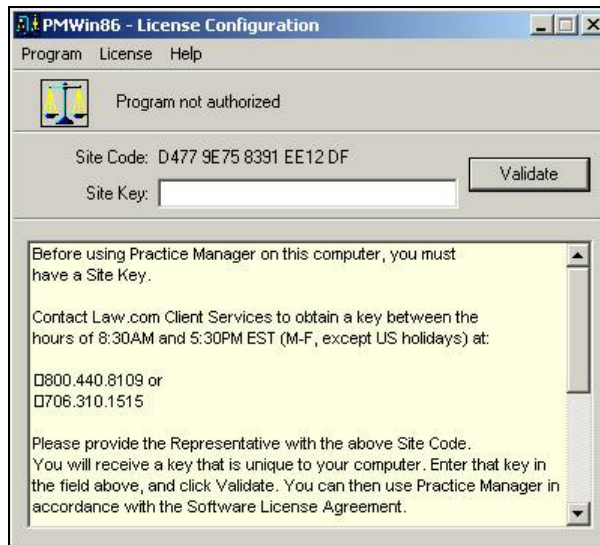
RealLegal Practice Manager checks to see if you are eligible to run the Practice Manager on this workstation.



The **RealLegal Practice Manager 30-Day License** window appears.

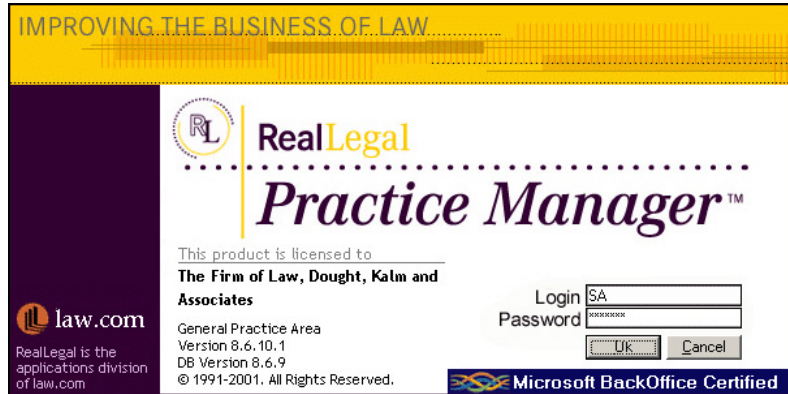


2 Press **Enter**. The **License Configuration** window appears.

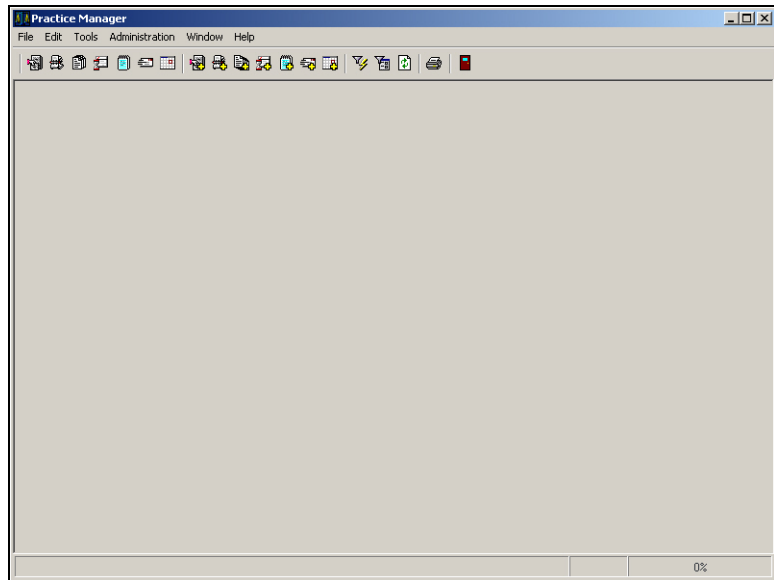


3 Write down the **Site Code**, and close the window.

- 4 Locate and execute the Practice Manager shortcut. The **RealLegal Practice Manager 30-Day License** window appears. After a few seconds, the **RealLegal Practice Manager Login** window appears.



- 5 Using the Administrator name and password you defined during the network installation process, login to Practice Manager. The main Practice Manager window appears.



You now ready to begin implementing RealLegal Practice Manager for your firm. Proceed to "Where to Go from Here" beginning on page 3-1.

To Get a Site Key Before running Practice Manager from this computer beyond the 30-day trial limit, you must have a **Site Key**.

- ◆ If all users are starting Practice Manager through a shortcut pointing to the server-based **pmwin.exe** file, then only one multi-user key is needed.
- ◆ If a user is starting Practice Manager through a shortcut pointing to a **pmwin.exe** file located on their PC, then they will need a separate key, which will be different from the one on the server

Note

RealLegal does not recommend this method of deploying Practice Manager, as there are no advantages to this, and version control can become a maintenance problem. You will need to get the site codes from all workstations before contacting RealLegal Client Services.

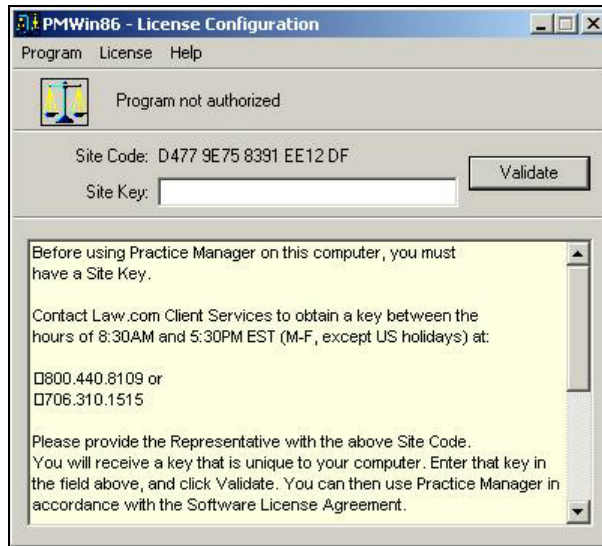
Use the following procedure to get a **Site Key** to enable RealLegal Practice Manager to work beyond the first 30 days.

- 1 Contact RealLegal Client Services to obtain a key between the hours of 8:00AM and 5:30PM MST (M-F, except US holidays) at 888.584.9988 or 303.584.9988.
- 2 Please provide the representative with the above **Site Code**.
 - If the Practice Manager executable (pmwin.exe) will be run from a central location on the network server via a shortcut on the workstation, the RealLegal Client Services Representative will give you a site key for your sever, appropriate for the number of licenses your firm or organization has purchased. You will only need the one site key for all workstations.
 - If the Practice Manager executable (pmwin.exe) will be placed on each workstation, then you will have to get a single-user site key for each workstation.

- 3 Start Practice Manager. The **RealLegal Practice Manager 30-Day License** window appears.



- 4 Press **Enter**. The **License Configuration** window appears.



- 5 Enter the **Site Key** you received, and click **Validate**. If the match is correct, the **Practice Manager Login** window appears.



6 Continue to login to Practice Manager.

This window will continue to appear each time you start Practice Manager until you have entered a valid key. Please note that a Site Key is only required when you first start Practice Manager. If you install and run Practice Manager on another computer, you will need to get another key from RealLegal. Workstations connected to a network installation of Practice Manager do not need a Site Key.

Thank you for your cooperation in helping us prevent unauthorized distribution and use of RealLegal Practice Manager!

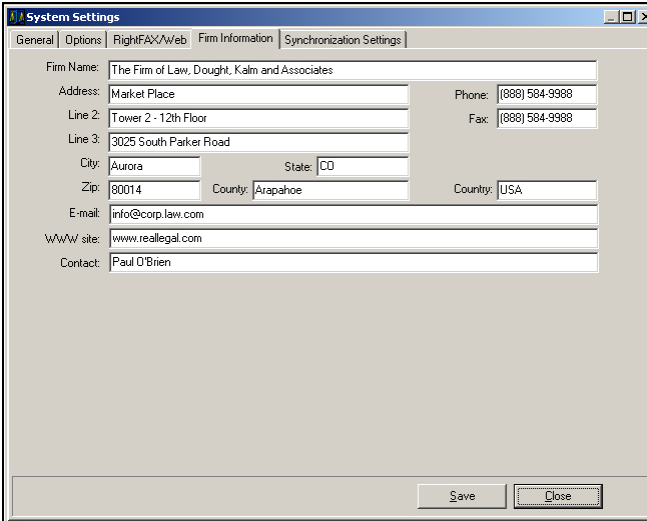
Where to Go from Here

Implementing Practice Manager

The implementation process involves setting up the data in the Practice Manager database for use by your firm. This work will be carried out with the assistance of RealLegal Client Services Representatives.

For the most part, the database is currently blank. The only records that exist are results of information collected during the network installation process.

- 1 Firm information: To review, choose **Administration – System Settings**, and click on the **Firm Information** tab.



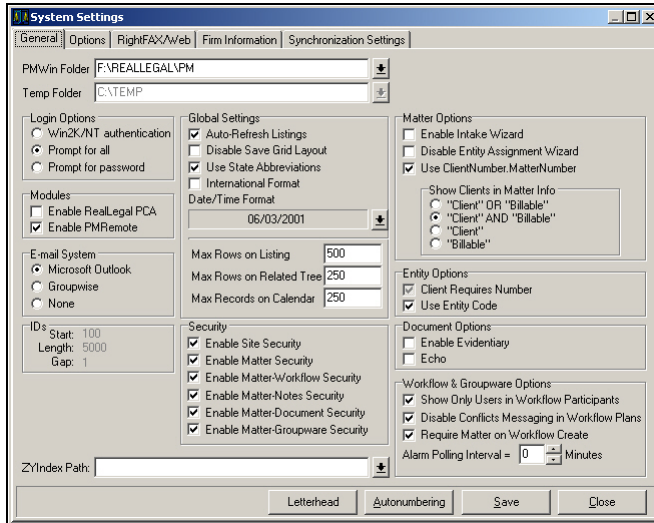
The screenshot shows a window titled "System Settings" with a tabbed interface. The "Firm Information" tab is selected. The form contains the following fields:

Firm Name:	The Firm of Law, Dought, Kalm and Associates				
Address:	Market Place		Phone:	(888) 584-9988	
Line 2:	Tower 2 - 12th Floor		Fax:	(888) 584-9988	
Line 3:	3025 South Parker Road				
City:	Aurora	State:	CO		
Zip:	80014	County:	Arapahoe	Country:	USA
E-mail:	info@corp.law.com				
WWW site:	www.reallegal.com				
Contact:	Paul O'Brien				

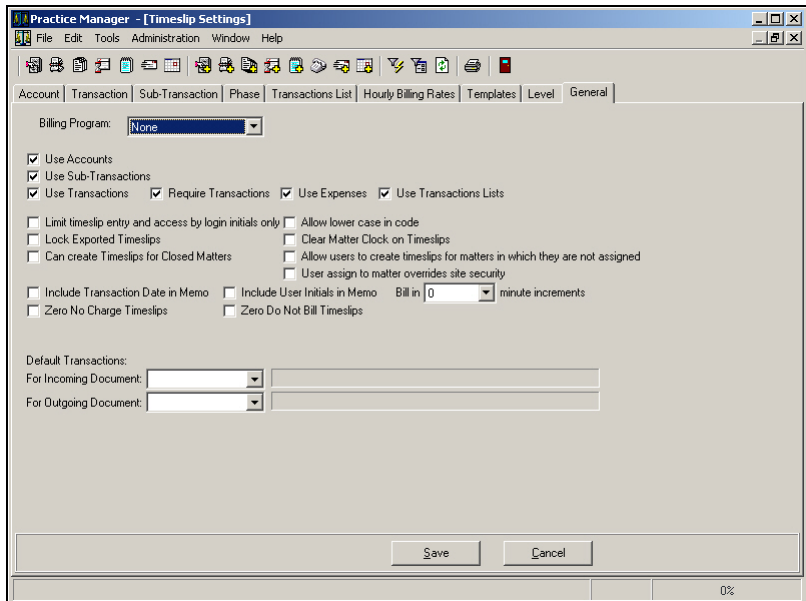
At the bottom of the window are "Save" and "Close" buttons.

3-2 Implementing Practice Manager

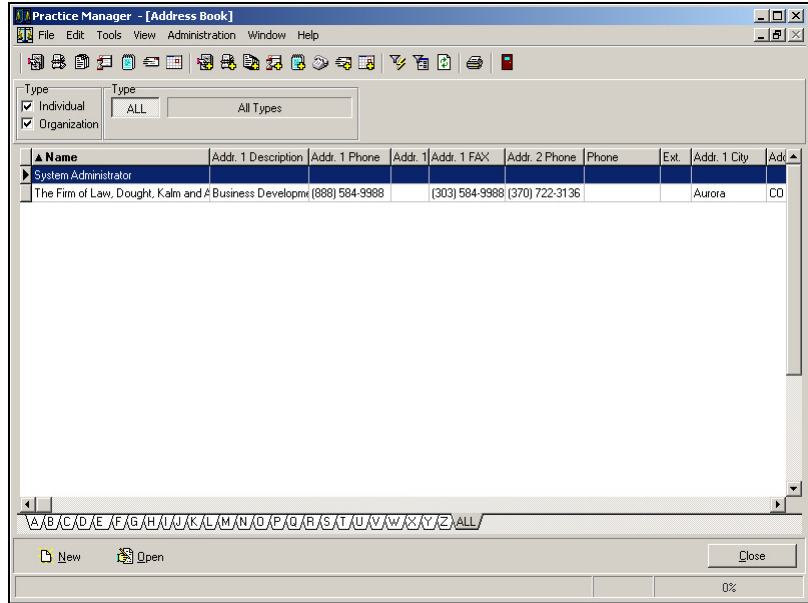
- Global settings for Practice Manager file location, default word processor, and default e-mail: To review, choose **Administration – System Settings**, or click on the **General** tab if this window is already open.



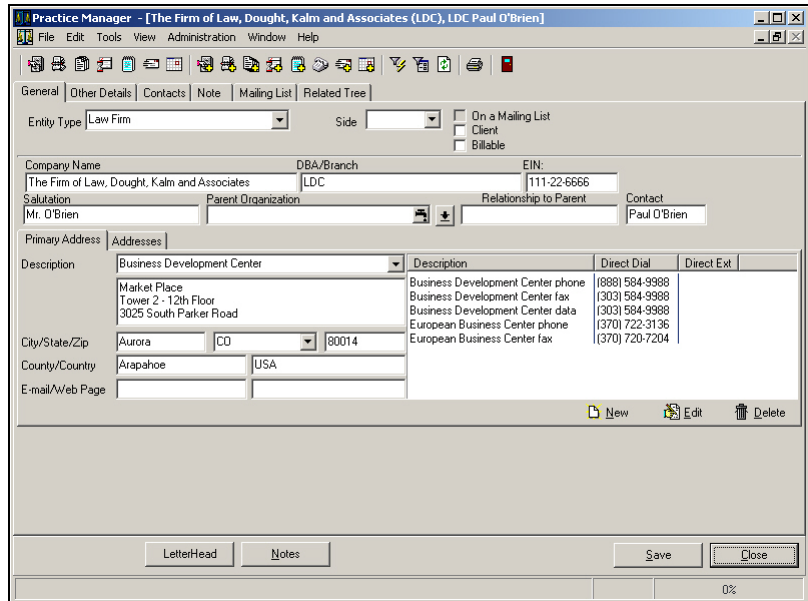
- Global settings for Billing: To review, choose **Administration – Timeslip Settings**, and click on the **General** tab.



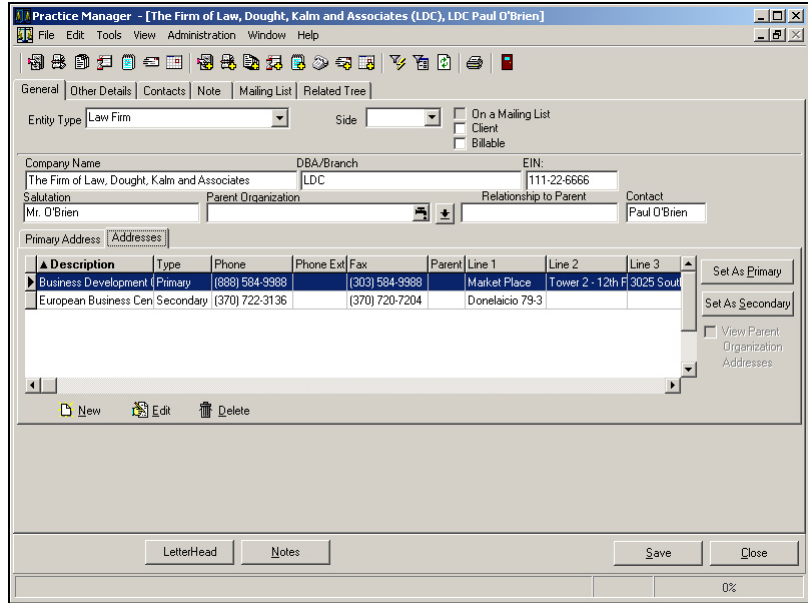
- An entity record for the firm: To review, choose **File – Open – Address Book**. The **Address Book** appears.



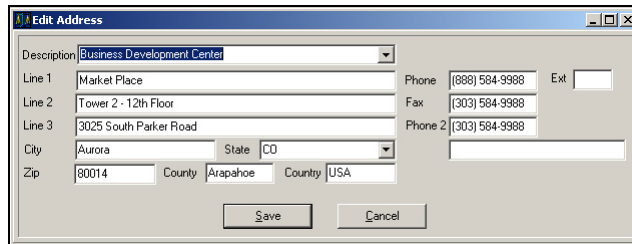
Click once on the firm name, and click **Open**. The **Entity Information** window appears.



Address information can be viewed by clicking on the **Addresses** tab.

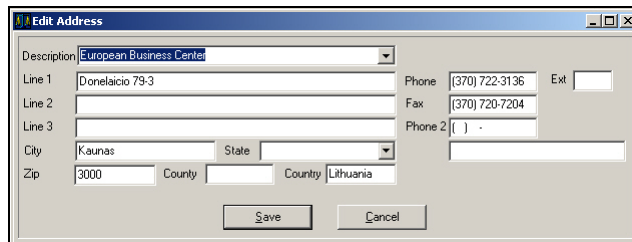


- To edit the **Primary Address**, click once on the top address list entry, and then click **Edit**. The **Edit Address** window appears.



Modify the data, as needed, and then click **Save**.

- To edit the **Secondary Address**, click once on the second address list entry, and then click **Edit**. The **Edit Address** window appears.



Modify the data, as needed, and then click **Save**.

- To add another address, click **New**. The **Add Address** window appears. Enter data, as needed, and then click **Save**.
- To make a different address the **Primary Address**, click on the appropriate address list entry, and then click **Set As Primary**.
- To make a different address the **Secondary Address**, click on the appropriate address list entry, and then click **Set As Secondary**.

5 An entity record for the system administrator

The initial major steps are as follows (these are all carried out through the Administration menu in Practice Manager):

- 1** Reviewing system settings, and adjusting as needed
- 2** Creating sites, if your firm has more than one and wants separate datasets for each.
- 3** Configuring security permissions (there are some predefined security roles that you can use).
- 4** Configuring entity types for the types of staff in your firm.

At this point, you can create users in the Practice Manager Address Book, specifying the entity type, and assigning them to a default site with a specific security level.

The remaining steps are directly associated with configuring RealLegal Practice Manager for the way your firm or organization works with the various data elements that are stored in Practice Manager.

This work includes configuring the following:

- 1** Matter and litigation-specific settings, including defining law categories, law types, matter types, and statuses
- 2** Law-type specific entity settings
- 3** Document settings, including what types of applications your firm or organization will use for working with incoming and outgoing documents
- 4** Document assembly settings and templates for outgoing documents

- 5 Timeslips settings for tracking time and expense, as well as integrating with your firm or organization's billing system
- 6 Note settings
- 7 Groupware and workflow settings for use with your firm or organization's e-mail and calendaring system

Getting Help

The online documentation can be your first source of information when implementing and working with RealLegal Practice Manager. This documentation is available through the **Help** menu in Practice Manager, and is stored in Adobe Acrobat PDF format. There is even a link for downloading and installing the Adobe Acrobat Reader software.



Getting Started Guide

This guide is a “road-map” for understanding the functionality in Practice Manager. It provides overviews of each subsystem and record types, as well as in-depth discussions of their use and relationships.

User's Guide

This guide is intended for all users of Practice Manager, and is intended to be used first as a training guide for new users, as well as a reference for those who are more experienced with the system.

Administrator's Guide

This guide is intended for system and data administrators who will be responsible for maintaining Practice Manager. It is intended to be used first as a guide for implementing Practice Manager, as well as a reference for those who are more

experienced with the system but occasionally need to be reminded of how to carry out seldom used tasks.

Ongoing Application Support

Application support is available directly from RealLegal. For more information on getting support, please consult with your RealLegal Client Services Representative, or visit http://www.reallegal.com/PM_support.asp.

Support for Microsoft SQL Server

RealLegal Application Support does not specifically handle issues related to Microsoft SQL Server, only those related to the RealLegal Practice Manager database.

If you need support for Microsoft SQL Server, please contact the vendor you acquired the software from, or visit Microsoft's support Website (<http://support.microsoft.com/directory/>).

Support for CrypKey

RealLegal uses CrypKey to protect Practice Manager from unauthorized distribution and installation. CrypKey is a very popular copy protection system, used by many software companies. From time-to-time, a conflict may arise on a server or workstation where several instances of CrypKey are running, especially if they are of different versions.

CrypKey provides an excellent Web site for supporting their products (<http://www.crypkey.com/support/support.html>), as well as e-mail support (crypkey.support@kenonic.com).

Troubleshooting Network and Workstation Install

The following are some troubleshooting tips for resolving issues which may occur while carrying out the network server or workstation installation:

Error: Cannot attach to database

The following error message occurs if MS SQL cannot attach to the Practice Manager database.

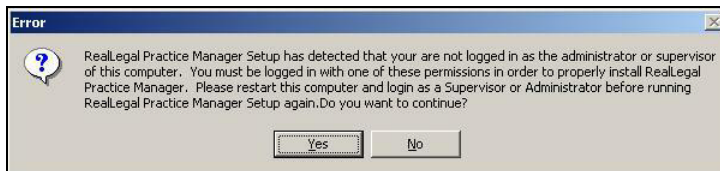


Setup cannot continue. Click OK to terminate the install.

This error means there could be a configuration problem with your SQL server. Contact Microsoft SQL Server Support for assistance.

Error: Not logged in as dupervisor or administration

The following error occurs if you are not logged in as the administrator or supervisor of the server or workstation.



Setup cannot continue. Click OK to terminate the install.

You need to log out and then log back on to the computer as a user with Administrator or Supervisor rights.

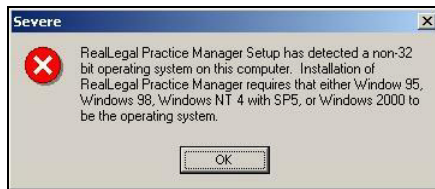
In Windows 2000, you would have been presented with the following dialog box after running setup.



If you did not choose to Install the program as a user with supervisor or administrator rights, this error appears after the Practice Manager setup begins.

Error: Operating system is not 32-bit

This error appears if the operating system you are running on the target computer for installation is not a 32-bit.

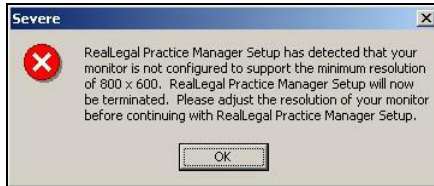


Setup cannot continue. Click OK to terminate the install.

You will either need to upgrade the computer to a 32-bit operating system, or install Practice Manager on another computer.

Error: Screen resolution is less than 800 x 600

This error appears if the resolution of your computer monitor is not set to 800 x 600 or higher.

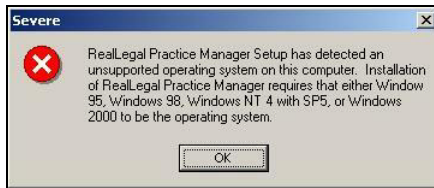


Setup cannot continue, until you adjust the resolution settings for the monitor.

Adjust the monitor display settings, and then click **OK** to continue with the install.

Error: Operating system is not Microsoft Windows

This error appears if the operating system you are running on the target computer for installation is not running a supported Microsoft Windows operating system.



Setup cannot continue. Click OK to terminate the install.

You will either need to upgrade the computer to a 32-bit operating system, or install Practice Manager on another computer.

Error: SQL Server is not 7.0 or higher

This error appears if the version of Microsoft SQL Server installed on the computer is not version 7.0 or higher.

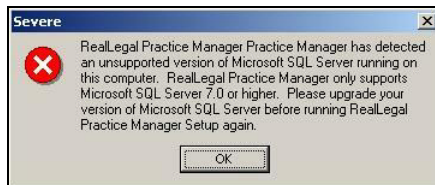


Setup cannot continue. Click OK to terminate the install.

You will either need to upgrade SQL Server to 7.0 or higher, or install Practice Manager on another computer.

Error: SQL Server is not installed

This error appears if the version of Microsoft SQL Server is not installed on the computer.



Setup cannot continue. Click OK to terminate the install.

You will either need to install SQL Server 7.0 or higher, or install Practice Manager on another computer.

Error: Practice Manager is currently running

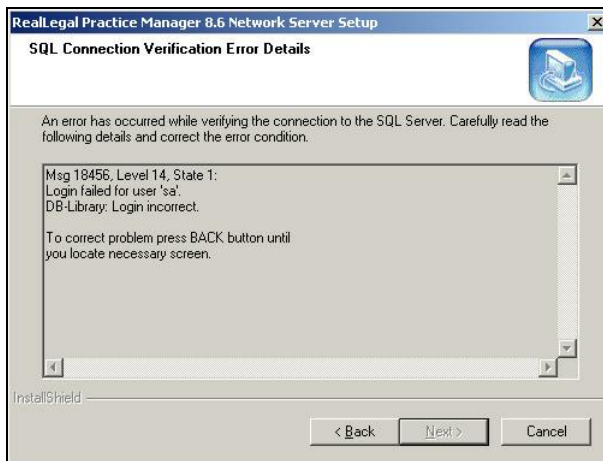
This error appears if a previously installed version of Practice Manager is running on the computer.

**Setup cannot continue until you close Practice Manager.**

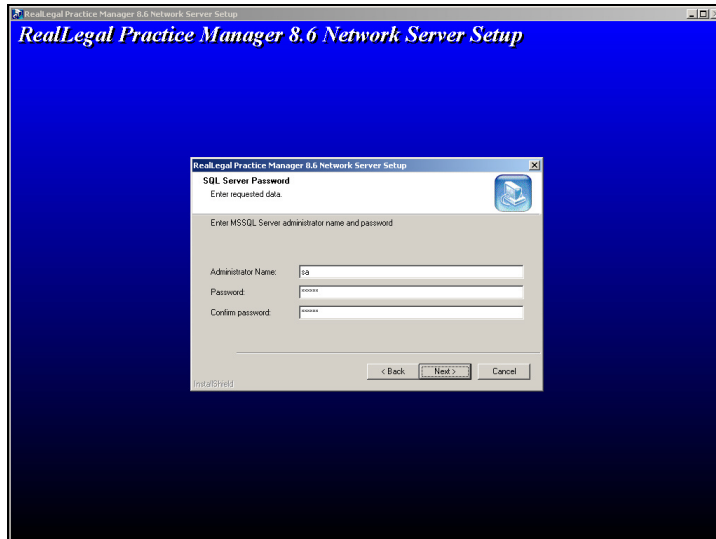
Switch to Practice Manager, close it, then return to this dialog box and click **OK**. Installation will continue.

Error: SQL connection verification – incorrect login

This error appears if the user name and/or password you used for the SQL Server Administrator is not correct.

**Setup cannot continue until you enter the correct username and password.**

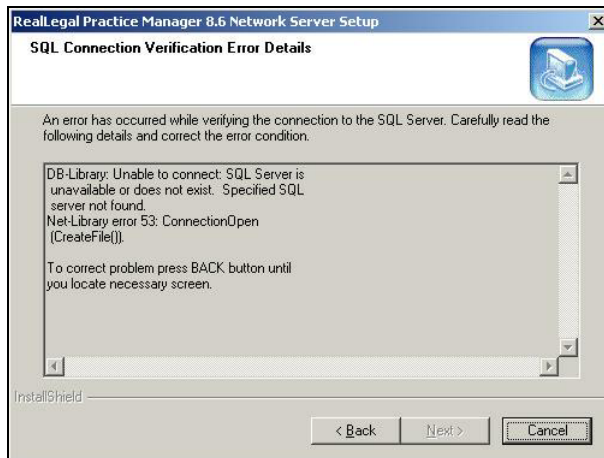
Click the **Back** button until the SQL Server Password window appears.



Check the exact spelling of the user name, and re-enter the password in both fields. Click Next to re-verify the connection.

Error: SQL connection verification – can't find server

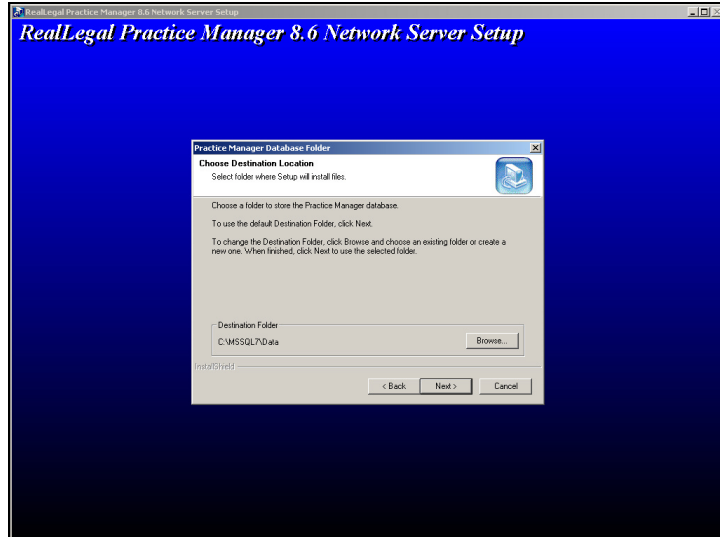
This error appears setup cannot find the SQL Server.



This can occur for several reasons:

- ◆ The name you entered for the SQL Server is not correct.

Click the **Back** button until you reach the Database Location window.

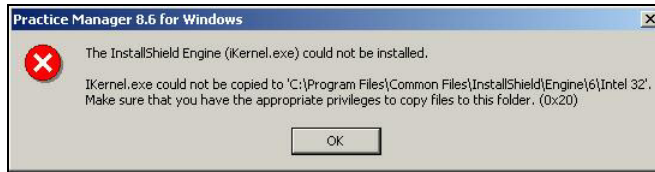


- Check the spelling of the Server to make sure it is correct.
- Check to make sure the name of the database does not include any invalid characters (we suggest you only use letters and numbers, no punctuation)
- ◆ SQL Server is running, but had been stopped prior to beginning setup. You need to start SQL Server.

Note

If SQL Server is not running when you begin setup, setup will launch it. But if SQL Server was running but stopped, setup cannot restart it.

Error Message: The InstallShield Engine could not be installed.



This occurs under one or more of the following conditions:

- ◆ You have more than once instance of an InstallShield setup running (e.g., you started the Workstation Installation without first closing the final window of Network Server Installation).

If this is the case, close any other instance of the InstallShield setup before attempting to start another one. You can press Alt + Tab to locate the other instance.

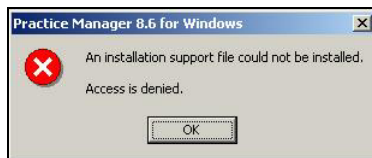
- ◆ You cancelled either Network Server Installation or Workstation Installation, and the iKernel.exe file was not “released” from memory.

Using the Windows Task Manager, locate the iKernel.exe process and terminate. For more information on using the Task Manager and/or terminating a process, refer to Windows Help.

If you are still unable to run setup, you may need to reboot your computer before attempting the install again.

Error: And installation support file could not be installed

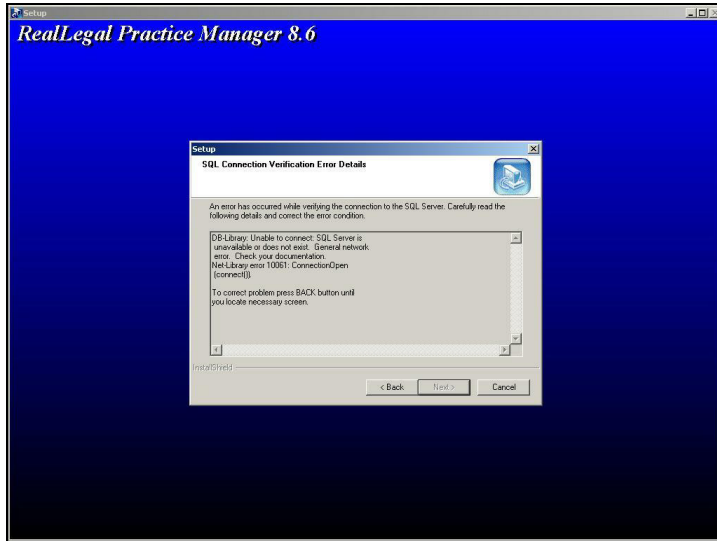
This error most likely occurs because access to the CD-ROM (Network Server Installation) or network folder (Workstation Installation) is too slow or not available.



- ◆ If installing from a CD, try removing and inserting the CD into the CD-ROM again. If the problem persists, you can copy the contents of the CD to the hard drive and install from their.
- ◆ If installing from a network folder, make sure there are no other processes running, like a file transfer, that could be impeding access to the network server.

Error Connecting to MS SQL Server

If an error occurs while connecting to MS SQL Server, an error message will appear, providing details as to why the connection could not be made. Click Cancel and correct the problem before attempting to run the Network Service Installation again.



Login Error: Cannot connect to the database for Primary Login

This error appears if Practice Manager cannot locate the Practice Manager database specified in the shortcut command line, or in the **pmwin.udl** file.



- ◆ Check the properties of the shortcut to see if the connection parameters point to a udl file, or if there are command line parameters.

- If command line...

f:\RealLegal\PracticeManager\pmwin.exe /srv=ourdataserver /db=pmwin.db

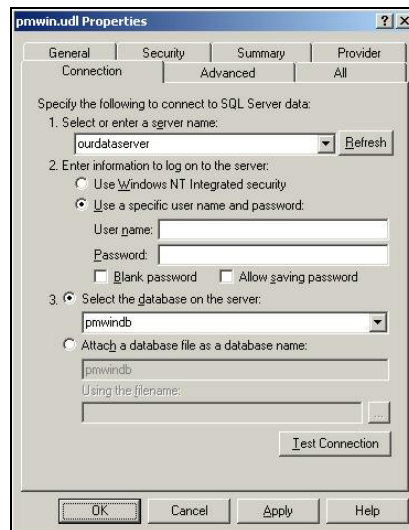
make sure the values after the **/srv=** and **/db=** switches are correct for the MS SQL Server and name of the Practice Manager database.

- If a UDL file is being used...

f:\RealLegal\PracticeManager\pmwin.exe f:\RealLegal\PracticeManager\pmwin.udl

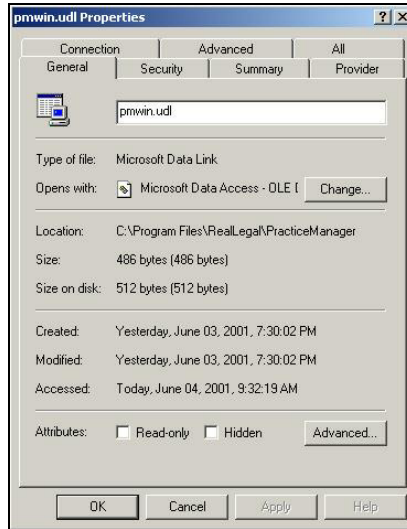
make sure the path to the pmwin.exe and the **pmwin.udl** file are the same, and that the **pmwin.udl** file exists.

- If there is a **pmwin.udl** file specified in the command line and it exists in the Practice Manager folder, double-click on it to check the connection configuration information using the Microsoft DataLink tool.

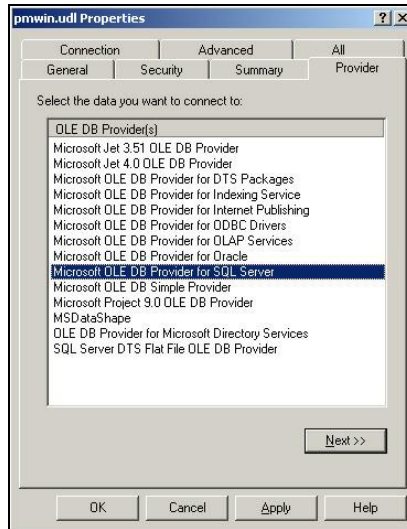


- If there is a **pmwin.udl** file specified in the command line, but it does not exist in the Practice Manager folder, you will need to create one with the MDAC DataLink Tool.
- If there is no **pmwin.udl** file specified in the command line but one exists in the Practice Manager folder, Practice Manager will use this one by default. To create a new **pmwin.udl** file in the

Practice Manager folder, simply create an empty text file and name it **pmwin.udl**. Then right click on that file and choose **Properties**. The pmwin.udl **Properties** window appears.

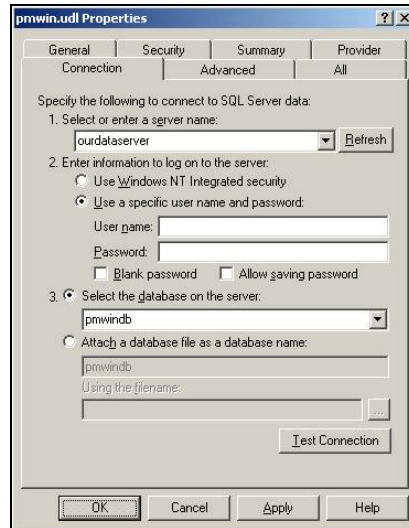


Click **Provider**.



Make sure that **Microsoft OLE DB Provide for SQL Server** is highlighted.

Click **Connection**.



Select the appropriate server name. If the server name is not on the drop-down list, click **Refresh**. If it is still not there, try typing the name.

Select the Practice Manager database from the drop-down list. If the database name does not appear, try typing the name.

Click **Test Connection**. If the connection is successful, a message appears. If the connection fails, you will need to check the SQL Server installation, and make sure it is running.

- If there is no pwmin.udl file specified in the command line and one does not exist in the Practice Manager folder, you will need to create one with the MDAC DataLink Tool.
- ◆ Check to see if the specified MS SQL Server exists and is running.
- ◆ Check to see if the specified database.

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Glossary

EULA	End User License Agreement.
MDAC	The Microsoft® Data Access Components (MDAC) are the key technologies that enable Universal Data Access. Data-driven client/server applications deployed over the Web or a LAN can use these components to easily integrate information from a variety of sources, both relational (SQL) and nonrelational. These components include Microsoft® ActiveX® Data Objects (ADO), OLE DB, and Open Database Connectivity (ODBC).” From http://www.microsoft.com/data/whatcom.htm .
Site Code	A unique number generated by the Practice Manager encryption software, that identifies your machine for the purposes of registering the Practice Manager executable, thereby preventing unauthorized distribution.
Site Key	A unique number provided by Practice Manager Client Services which, when entered on the License Configuration window, validates your installation of Practice Manager, and allows it to function after 30 days.

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Index

3

30-day trial license window 2-38, 2-41

A

additional information window 2-8

Administrator's Guide 3-6

alternate address window 2-7

C

choose pm folder window 2-10, 2-11, 2-12, 2-13, 2-20, 2-21, 2-22

client install 2-27

contact 2-8

D

database location window 2-20

database window 2-16

default billing program window 2-15

default e-mail window 2-14

default word processor window 2-14

desktop icon 2-37

desktop shortcut, workstation install 2-31

details confirmation window 2-9

documentation

Administrator's Guide 3-6

Getting Started Guide 3-6

User's Guide 3-6

E

end user license agreement 2-5

EULA 2-5
EULA, workstation install 2-30

F

file download message 2-3
file download window 2-28
finished window 2-26
firm additional information window 2-8
firm alternate address window 2-7
firm contact 2-8
firm details confirmation window 2-9
firm details window 2-5
firm primary address window 2-6
firm website 2-8

G

Getting Help 3-6
Getting Started Guide 3-6

H

help
 Administrator's Guide 3-6
 Getting Started Guide 3-6
 User's Guide 3-6

I

implementation 3-1
initial login 2-36
installation components window 2-11

L

license agreement, workstation install 2-30
license configuration window 2-38, 2-41
local path window 2-15
login
 30-day trial license window 2-38, 2-41
 desktop icon 2-37
 initial 2-36

license configuration window 2-38, 2-41
start menu 2-36, 2-37

M

MDAC 2-33
MDAC setup progress, workstation install 2-32
Microsoft SQL Server administrator window 2-23

N

network install 2-2
 choose pm folder window 2-10, 2-11, 2-12, 2-13, 2-20, 2-21, 2-22
 database location window 2-20
 database name window 2-16
 default billing program window 2-15
 default e-mail window 2-14
 default word processor window 2-14
 finished window 2-26
 firm additional information window 2-8
 firm alternate address window 2-7
 firm details confirmation window 2-9
 firm details window 2-5
 firm primary address window 2-6
 installation components window 2-11
 license agreement 2-5
 local path window 2-15
 Microsoft SQL Server administrator window 2-23
 pm folder window 2-10
 readme.txt 2-26, 2-34
 splash screen 2-4
 start page 2-2
 welcome screen 2-4

O

online books
 Administrator's Guide 3-6
 Getting Started Guide 3-6
 User's Guide 3-6

P

pm folder window 2-10
Practice Manager
 implementation 3-1
Practice Manager Main Window 2-39
pre-install checklist 1-1
pre-install information 1-2
primary address window 2-6
program folder, workstation install 2-30

R

readme.txt 2-26, 2-34

S

security warning message 2-3
security warning window 2-28
setup confirmation, workstation install 2-31
setup progress, workstation install 2-32
site code 2-1, 2-38, 2-41
site key 2-1, 2-38, 2-41
splash screen, workstation install 2-29
start menu 2-36, 2-37
start page, workstation install 2-27

U

User's Guide 3-6

W

website 2-8
welcome window, workstation install 2-29
workstation install 2-27
 desktop shortcut 2-31
 file download window 2-28
 license agreement 2-30
 MDAC setup progress 2-32
 program folder 2-30
 security warning window 2-28
 setup confirmation 2-31

setup progress 2-32
splash screen 2-29
start page 2-27
welcome window 2-29

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