Improving the Business of Law

Workstation Installation Guide

Version 8.6 SP-1
August 13, 2001

RealLegal
Practice Manager™

law.com

Version 8.6 SP-1

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Introduction

Before You Begin

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

1. Is your workstation running Microsoft Windows 95/98/Me, NT with SP5, or 2000? If not, you cannot install Practice Manager on this workstation.
2. Are you logged in as the administrator/supervisor for the workstation? If not, log out and then log in again as the server administrator or supervisor.
3. Has your system administrator provided you with a user name and password for starting Practice Manager? If not, you need to contact your system administrator and get this information.
4. Do you know where the client installation folder is located on the network server? If not, you need to contact your system administrator and get this information.
5. Do you have access to the location on the network where the Practice Manager files are located. If not, you will need to get access to that location.
6. Is Microsoft Internet Explorer 5.0 or higher installed on the workstation?
7. Is the resolution of the monitor at least 800 x 600?

Before Practice Manager can be installed on the workstation, you will go through a series of screens that are designed help you customize the installation. This information includes the following:

1. Acceptance of the End User License Agreement (EULA).
2. Location where the Practice Manager shortcuts will be placed.

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

Installing RealLegal Practice Manager

Overview

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

1. Run the client setup from the network server, and eeboot your workstation after installation has been completed.
2. 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 using Practice Manager.

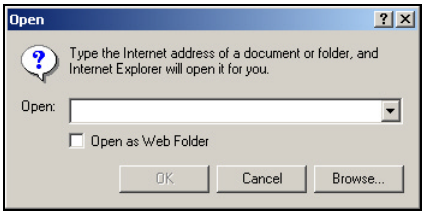
Step 1: Workstation Install & Rebooting

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

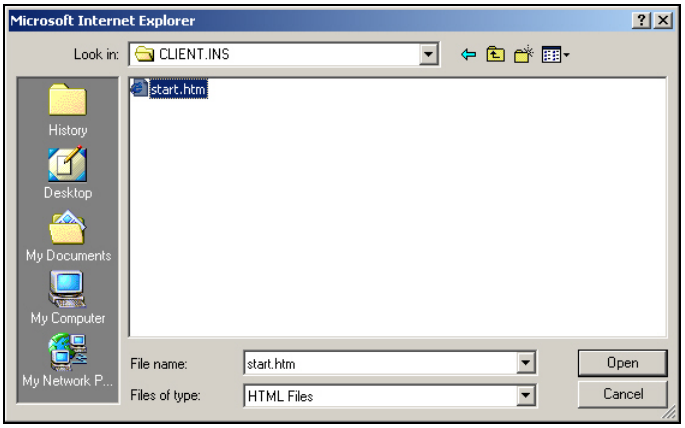
To Start the Workstation Setup

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

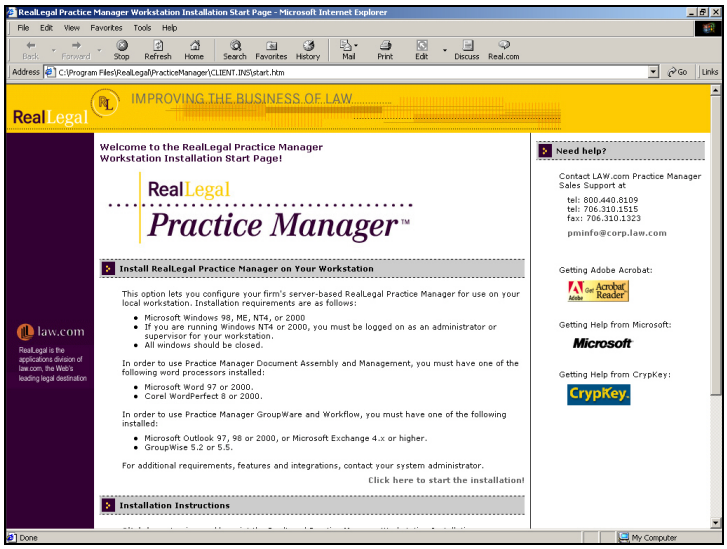
1. Start Microsoft Internet Explorer.
2. Choose **File – Open**. The Open dialog box appears.



3. Click Browse. The browse window appears.



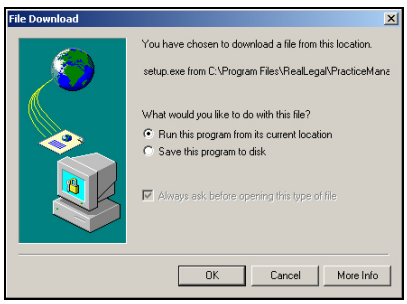
4. Locate the **client.ins** folder inside of the Practice Manager folder on your network server (e.g., f:\apps\reallegal\pmwin\client.ins\) and locate the start.htm file. The **RealLegal Practice Manager Workstation Setup** page appears.



This page provides access to the following:

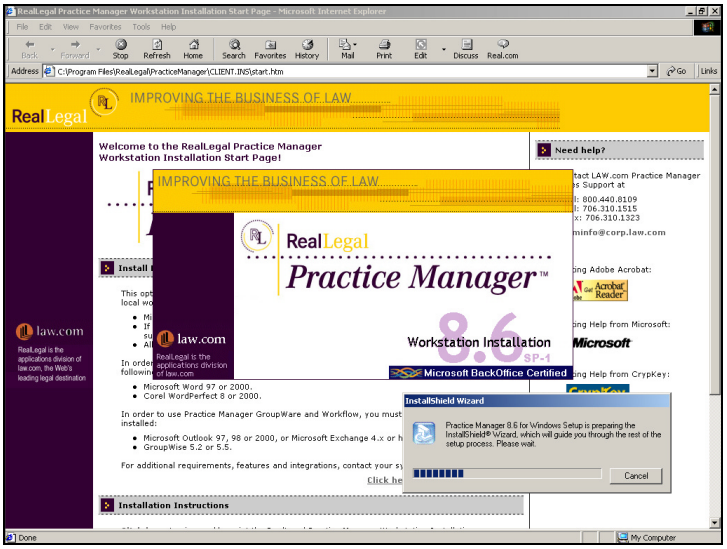
- The RealLegal Practice Manager Workstation Setup program
- The RealLegal Practice Manager Workstation Setup program installation instructions
- Law.com and RealLegal Websites
- Support websites for Adobe Acrobat Reader, Microsoft and CrypKey

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:

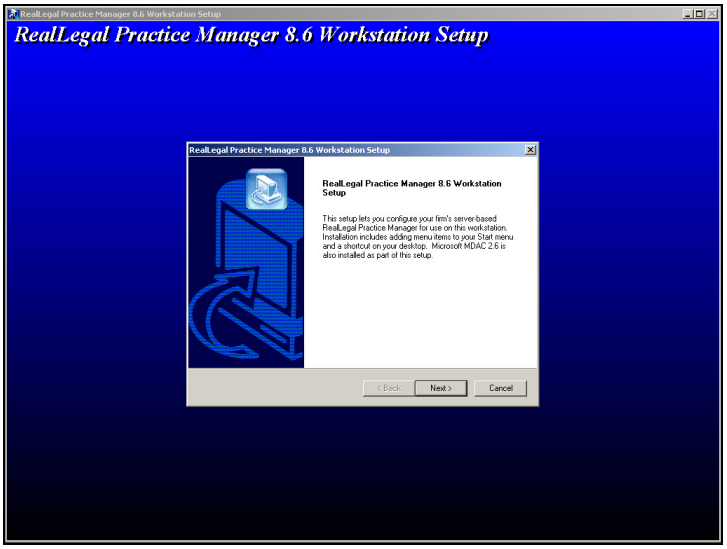


Click **OK** and/or **Yes** as needed.

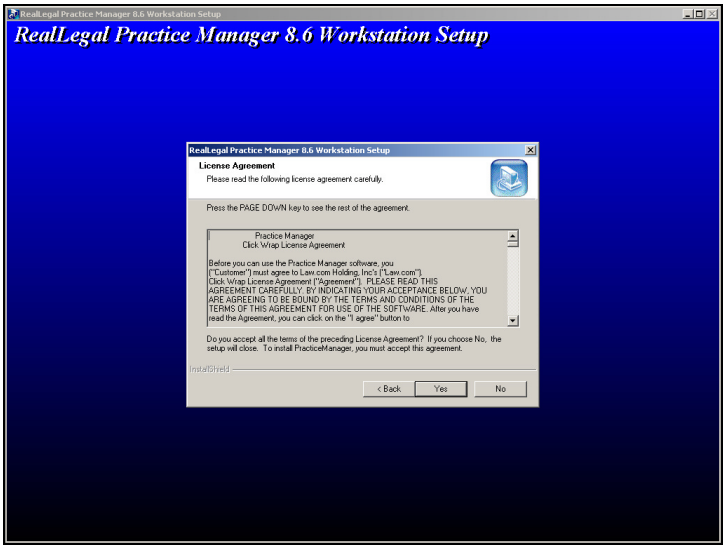
The **InstallShield Wizard** prepares the RealLegal Practice Manager files for installation.



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

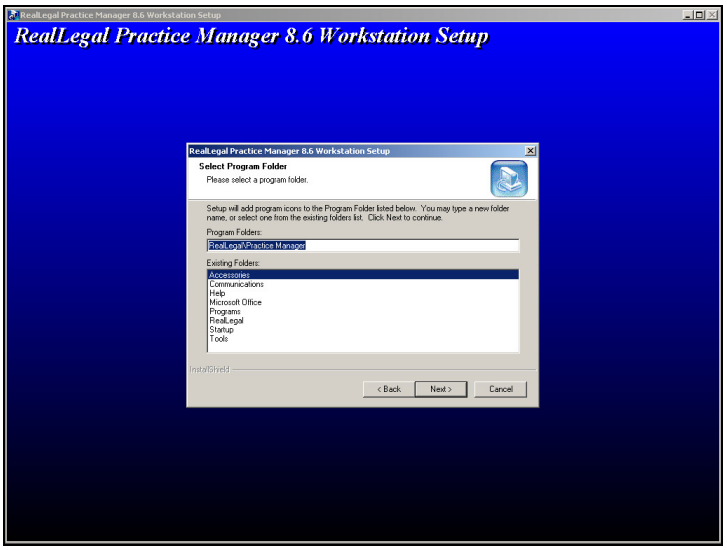


6 Click **Next**. **The RealLegal License End User License Agreement (EULA)** appears.

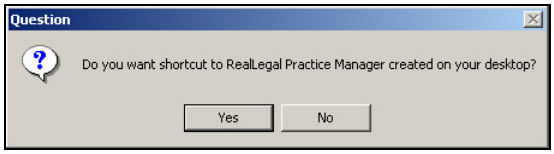


Configuring Practice Manager on your workstation…

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

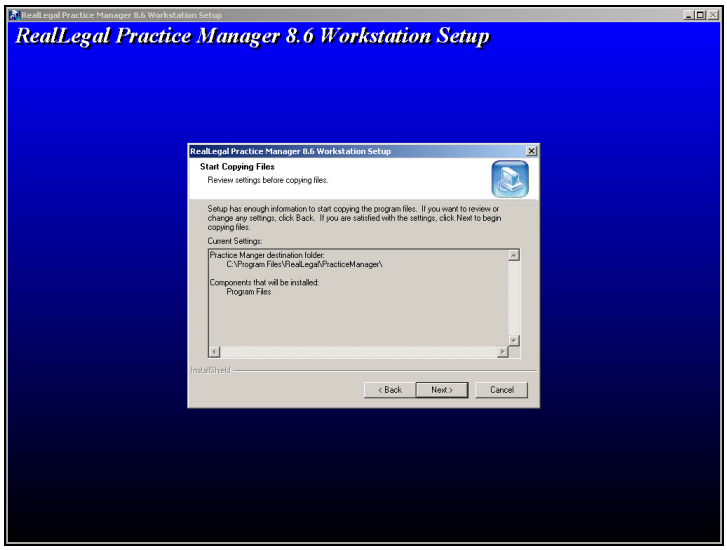


8 Click **Next**. A prompt appears that asks if you want to place a shortcut to RealLegal Practice Manager icon on your desktop.



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

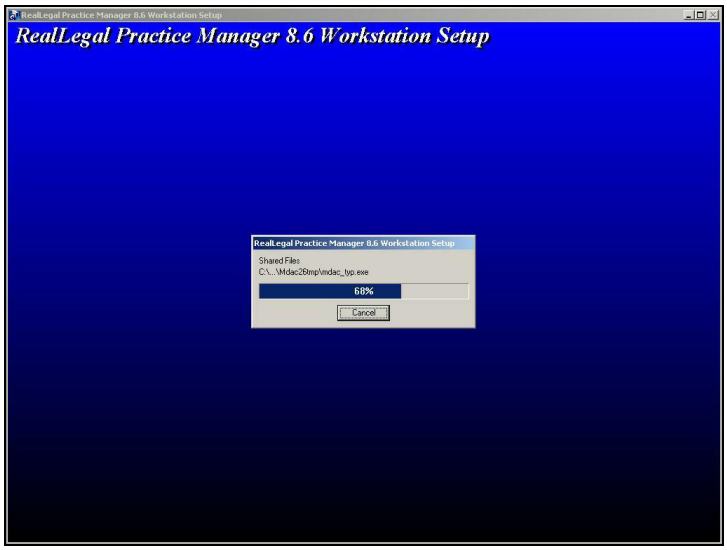
The **Confirm Setup** window appears.



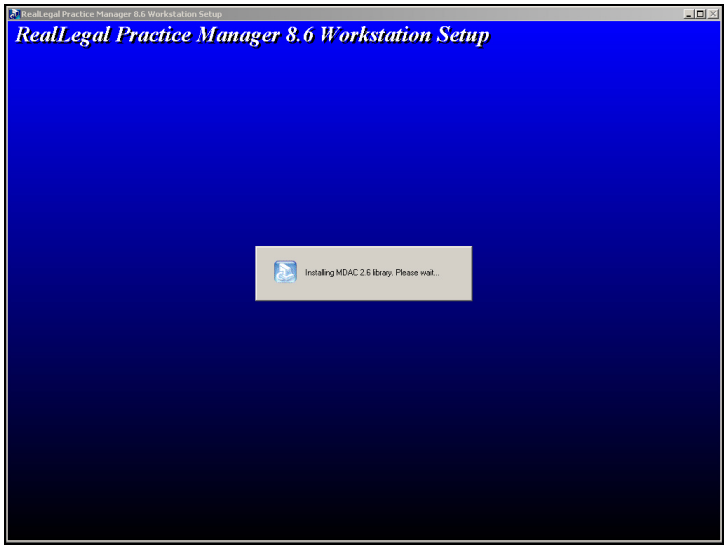
If the information is not correct, click **Back** until the appropriate window appears, and correct the information as needed.

Installing the files…

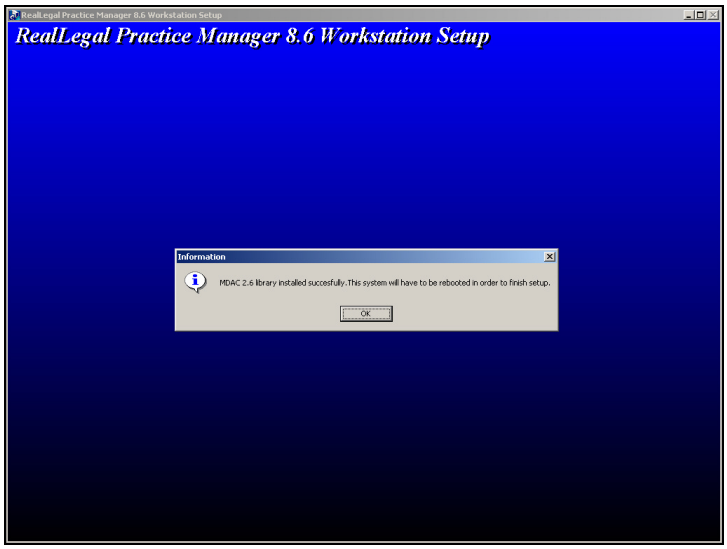
9 When ready to begin installing the files, click **Next**. A progress bar appears while the Practice Manager files are installed.



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.

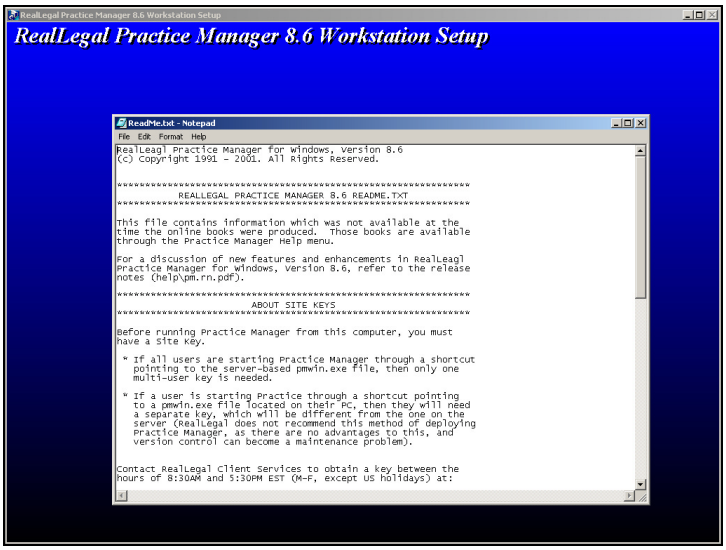


About MDAC

"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 2: Login" beginning on page 2-10.

Step 2: Login

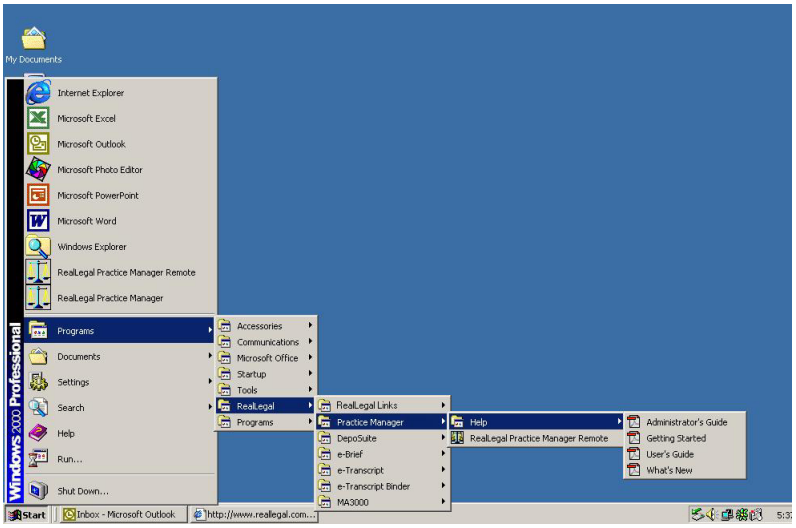
After you have completed the client workstation installation and rebooted your computer, you can start and log in to Practice Manager, and begin using it.

To Log in to Practice Manager

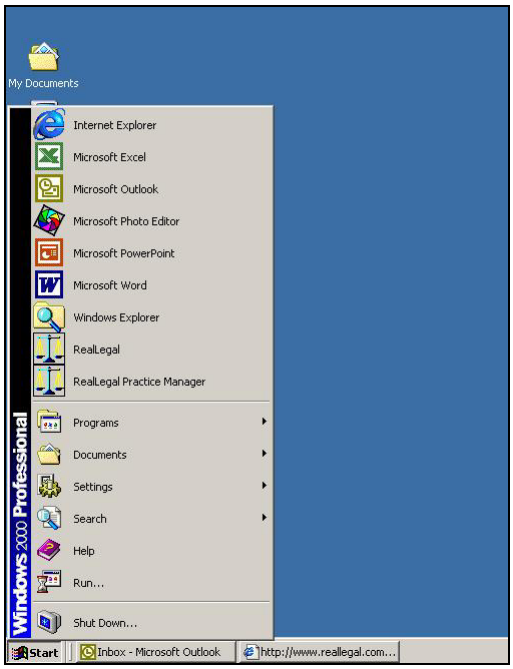
Use the following procedure only when logging into Practice Manager.

1 Locate and execute the Practice Manager shortcut.

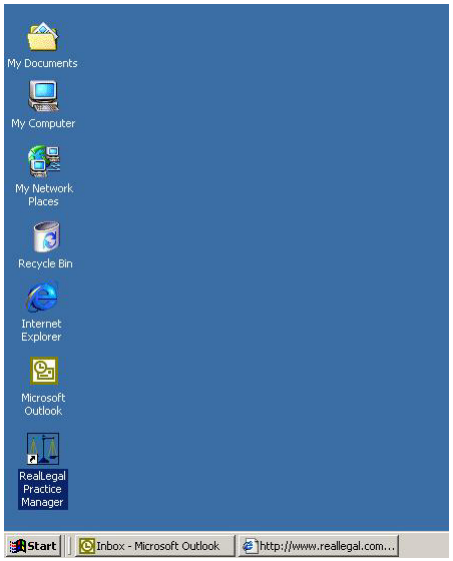
Or in the program folder you selected…



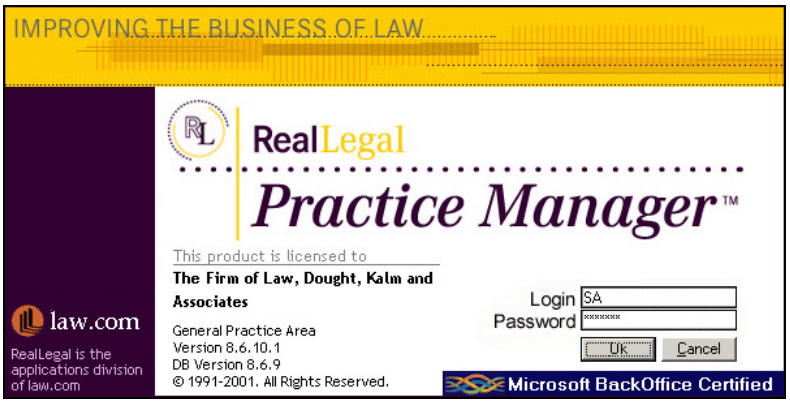
It will be located either on the Start Menu…



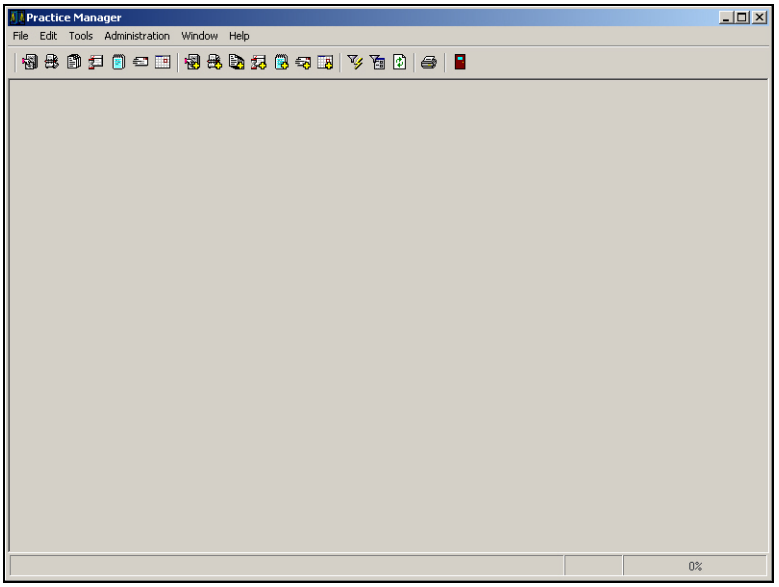
Or on the desktop…



The **RealLegal Practice Manager Login** window appears.



2 In the **Login** and **Password** fields, respectively, type the user name and password provided to you by your System Administrator, and click **OK**. The main Practice Manager window appears.



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

Where to Go from Here

Using Practice Manager

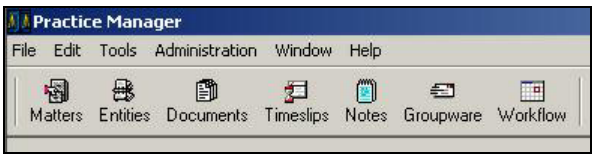
There are seven primary data objects in Practice Manager:

1. Matters
2. Entities – Companies and Individuals
3. Documents
4. Timeslips
5. Notes
6. Groupware (e-Mails, Tasks, Appointments, etc.)
7. Workflow (calendars and work plans)

Two additional objects, Issues and Annotations, are only accessible from within matters, documents and notes.

With the exception of Matters and Entities, documents, notes, groupware, workflow, timeslips, issues and annotations are all specific to matters. Entities can exist within Practice Manager, with our without being assigned to matters.:

One of the easiest ways to get started is by clicking on each of the first seven icons on the toolbar, looking at the lists associated with each.



Open a record from each list, and look at the fields and tabs associated with each. You should find most of the terminology and usage quite familiar.

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.

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).

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