

# CONVERSION GUIDE

CONVERTING FROM  
4, 5 OR SMALL FIRM



PREMIUM EDITION

2008

**Who should use this Guide:**

- Firms who are upgrading from Amicus Attorney:
  - Small Firm Edition
  - Version 4 or 5 (all editions)

If upgrading from any other version of Amicus Attorney, do not use this Guide.  
THIS GUIDE IS NOT RELEVANT TO THOSE CONVERTING FROM VERSION 7

**Need Assistance?** Contact Technical Support at 800-472-2289 or 416-977-6633.

# Conversion

## What you need to know about Conversion

If you are upgrading to Amicus Attorney 2008 Premium Edition from Small Firm Edition or Version 4 or 5, conversion is a separate function that you can run when you are ready. This means that you can install Premium Edition and experiment with it before converting and “going live”. (Note that this is not the case for those who upgrade from Version 7, where the database is converted immediately upon upgrade.)

**IMPORTANT:** Because conversion will **OVERWRITE** any data previously entered in Premium Edition, you can freely explore after installing without worrying about the data you enter. Instead of exploring with a blank database you may wish to perform an initial full test conversion to provide temporary data; then perform a second conversion prior to roll out to replace all experimental data and settings with current data.

You may install on a computer (server or workstation) that has an earlier version of Amicus Attorney. However, there are several important considerations to note before running Premium Edition and an earlier version simultaneously:

- Users should only use the “core” functions in Premium Edition during this interim period. NEVER run live third-party integrations, including accounting links and Outlook (E-mail, Contacts, or Calendar), simultaneously from multiple versions of Amicus Attorney. This might result in loss and/or corruption of data.
- Do not install the Amicus PE Merge Toolbar as this will overwrite earlier version macros.
- Data entered in Premium Edition cannot be converted back into an earlier version. Do not put some data you want to keep in one version, and some in another, as it will be impossible to keep both.
- Running a subsequent conversion process will overwrite all existing data and settings.

After going live, users should discontinue use of their earlier version of Amicus.

## Database size

After conversion, your Premium Edition database will be slightly larger than your previous database. During the conversion process, we recommend that the drive on which your Premium Edition database will be located has free disk space equal to twice the size of your database.

## Before you start a conversion

**IMPORTANT: Converting your data will REPLACE any data previously entered in your Premium Edition database. The firm and user information entered during the installation process is retained. Use those credentials to log in after conversion.**

- 1 For a description of how data is converted, read “What happens during conversion” on page 4.

- 2 In your PREVIOUS version of Amicus Attorney:
  - We recommend that you resolve duplicate Contact records. For best results use broad criteria when running the Duplicate Contact utility— e.g., select only First Name and Last Name.
  - Archived data is not converted. If you have archived data that you wish to include in the conversion, dearchive it now. Alternatively, retain your previous version of Amicus Attorney to reference this data in the future.
  - Perform an Accounting Link exchange, if applicable. (Any Posted entries that have not been exchanged before conversion will be assigned the Unposted status after conversion.)
  - Make sure that all users are online and logged out. This ensures that the database is up-to-date and not locked.
  - Run the Scan Database utility from the Amicus Administrator program. This repairs possible inconsistencies in the database.
  - **IMPORTANT: Back up your previous database.**
  - Exit the Amicus Administrator program.
  - If you are running a split install (where the database is on a different computer than Amicus Administrator), ensure that the Service for your previous version (or Amicus Server utility, shown as an icon in the notification area of the Windows Taskbar) is stopped.
  - If you are running an NLM version of Amicus in a Novell environment, then at the Novell console, type the command to stop the service: `unload ctsrvr.nlm`
- 3 If you have not already done so, complete your installation of Premium Edition on your server. Refer to the Install Guide for complete instructions. Ensure that all Premium Edition users, including you, are online and logged out.
- 4 Close any other programs also running in Windows on the Premium Edition Application Server.
- 5 During the conversion process, a C:\ drive is required on the Premium Edition Application Server for temporarily storing configuration information.
  - Please ensure that the computer has a C:\ drive and that you have read/write permissions.
  - If running under Windows Vista, please disable User Account Control (Windows Firewall) for the duration of the conversion process.
- 6 If your Team Database folder (Team40, TEAM50, AMICUS TEAM SF, or AMICUS ATTORNEY 2008 SFE TEAM) or Organizer Edition database (AMICUS40 or AMICUS50) is on a different computer than your Premium Edition Application Server, map a drive on the Server to your database folder.

You are now ready to run the Amicus Attorney Database Converter.

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## Using the Converter

**NOTE:** The conversion process can be lengthy (several hours) depending on the size of your database.

- 1 Launch the V4+ Converter**—At the Amicus Attorney 2008 Premium Edition Application Server, go to the Windows Start menu and choose All Programs > Amicus > Amicus Attorney 2008 PE Tools > V4+ Database Converter. When ready to proceed, click Next. Your current Premium Edition database is automatically backed up and the clean startup Premium Edition database is restored.
- 2 Specify the database location**—Specify the location of your Team Database folder (TEAM40, TEAM50, AMICUS TEAM SF, or AMICUS ATTORNEY 2008 SFE TEAM) or Organizer Edition database folder (AMICUS40 or AMICUS50). Click Next to continue.
- 3 User Mapping**—If applicable, map the user entered as part of the Premium Edition Server install to the corresponding Team Member in your previous version of Amicus Attorney. All unmapped Team Members will be automatically added as new Firm Members in Premium Edition. Click Next to continue.

NOTE: If no names appear in the lists:

- Click Cancel.
  - Ensure that you have prepared your previous version, as described in step 2 of the previous section.
  - Start the Converter again, from step 1 above.
- 4 Start the conversion**—A dialog appears, summarizing what will occur during conversion. Click Finish to start the conversion. The Conversion In Progress dialog appears within a few minutes.

**DO NOT INTERRUPT THE CONVERSION PROCESS.** If you do interrupt it, click Retry to continue. Note that the progress bar proceeds unevenly, depending on the size of the particular database table being processed currently.

- 5** The Database Conversion Complete message indicates that you have now converted your database. Click OK.  
If the Converter encountered any data errors (e.g. records it could not convert), a dialog will refer you to `AmicusConverter.log`, located in the `\Amicus\Amicus Attorney PE Server\MSSQL\DatabaseConverter` folder.  
Click OK. For assistance, please contact Gavel & Gown Technical Support.
- 6 WARNING: After going live, users should discontinue use of their earlier version of Amicus. We recommend that you set Deny Access for all users in your previous version. Any subsequent use of that version for data entry, document assembly, third-party link exchanges, etc. will produce inconsistent data and may cause loss of data.**

## After converting your data

We recommend that you read the “What happens during conversion” section below. Then log in to Amicus Attorney 2008 Premium Edition and review your data. In particular:

- 1 Examine and address any errors listed in the Log. At the Server, go to the `\Amicus\Amicus Attorney PE Server\MSSQL\DatabaseConverter` folder and open `AmicusConverter.log`.
- 2 Check for and resolve duplicate records. *Any duplicates that existed in your previous version of Amicus Attorney will not have been resolved during conversion.*

**Document Template records**—Review and delete any unused duplicates. The defaults shipped with Premium Edition are not removed during conversion. Your previous Document Templates have been copied to the following folder:  
`\Amicus\Amicus Attorney PE Server\DocumentAssemblyTemplates\Convert1`

**Contacts**—If any Team Members were entered as Contacts in your previous version, they will appear as both Firm Members and Contacts in Premium Edition. (This will result in them appearing twice in People On The File lists.) Premium Edition employs a new model in which such duplication is not required.

- 3 Configure all Firm Settings. In the Office module, choose Firm Settings from the control panel. Even if you had done some configuration before conversion, you should revisit these settings to ensure that they were not adversely affected.
- 4 Review the conversion of Custom Pages for both Files and People. You will need to revisit the placement of Custom Fields on all Custom Pages. A new layout editor gives you greater flexibility in designing your Custom Pages. In the Office module, choose Custom Pages and Records from the control panel. Refer to “Data Reclassification” below for more information.
- 5 Continue with the “Setting up your Amicus environment” steps listed in the “Server Install” section of the *Install Guide*.

## What happens during conversion

This section explains the general rules applied during the conversion of your data to Premium Edition. Due to differences in the Premium Edition data model, some settings are not converted because either they are no longer necessary or they require reconfiguration. Additionally, some data is reclassified on conversion.

During the conversion process the following occurs:

- All existing data in Premium Edition is REPLACED with the Amicus data from your previous version.
- Document template files (e.g. .DOT and .WPT files) from your previous version’s Team `\Template\Document` folder are copied to `\Amicus\Amicus Attorney PE Server\DocumentAssemblyTemplates\Convert1`

# Conversion

## Data reclassification

**Primary Clients**—If a File has a single Contact with the Role “Client” assigned, that Contact is designated the Primary Client on the File (provided that this does not disrupt the uniqueness of Client IDs).

**Firm Member Initials**—The Initials of converted Firm Members are made unique where necessary, by truncating them to 3 characters and appending a consecutive number (e.g. “ABC-1”). A maximum of 5 characters are supported in this field.

**Company Contacts**—Any Contact who has a Company Name but no First, Middle, or Last Name is converted as a Contact designated as a “Company” (rather than an “Individual”) in Premium Edition.

**Library**—Personal Library Page Types and Personal Keywords are not supported in Premium Edition. These items are converted to Firm Library Page Type lists and Keyword lists, respectively.

**Stickies and Notes**—Stickies are converted to Unassociated Notes. Both Associated and Unassociated Notes are converted if applicable to your earlier version.

**Custom Fields**—Premium Edition does not use slot numbers to store custom fields. They are no longer identified in the database as Custom Field 1, 2, 3, etc. but instead, after conversion, are assigned two attributes: their original Label Name, plus a Custom Field Name composed of their Label appended with the text “Contacts” or their File Type name, as applicable. For example, the Contacts custom field “Date of Birth” in your previous version will be converted with a Label Name of “Date of Birth” and the Field Name “Date\_of\_Birth - Contacts”. Appending “Contacts” or the File Type Name to the Custom Field Name keeps it unique and avoids possible conflicts. Text Custom Fields are converted to Memo Custom Fields in order to avoid truncation of data. Note that Premium Edition includes a function for moving data from one Custom Field to another (of the same type) which can assist you in managing your Custom Fields. See the Administrator Help for details.

**Document Assembly Map Files**—Premium Edition ships with a “Version V And Below Map” and a “Combination Map”. These Maps are applicable to firms upgrading from Small Firm Edition, Version V+, or below. Both of these Maps define the relationship between the old Amicus merge variables and the new Amicus fields. The “Version V And Below Map” will be assigned to each of your converted Master Document records. If it is necessary to add new Premium Edition merge variables to your converted templates, assign the “Combination Map” (which includes those variables).

TIP: The number of fields included in an assigned Map may affect document assembly performance. To improve performance for an individual template, create and assign a Custom Map containing only the fields required for that template.

**Document Template Groups**—Your Master Document Groups are converted to Document Template Groups with the prefix “Convert1 - ” to avoid any confusion of your previous document templates with the ones that ship with Premium Edition.

**HotDocs Document Templates**—If any of your HotDocs Master Documents contain numbered People On The File merge variables (e.g. People1FirstName, People2FirstName, etc.), we recommend that these be replaced with the appropriate new People On The File merge variables provided in Premium Edition (e.g. PeopleFirstName) and the HotDocs Repeat function set appropriately.

If your firm has Master Documents that were created in HotDocs 5 or earlier and you now wish to use a higher version of HotDocs, see the Amicus User Help for instructions on upgrading.

**Documents attached to records**—Document files attached to Amicus Files or Library Pages (including saved e-mail attachments) are left in their original network location. Ensure that shared document locations are properly configured in both Firm Settings and user Preferences.

## Items that require reconfiguration

The following items are not converted due to incompatibility with version changes:

- Access Profiles (now called *Security Profiles*).
- Some individual user Setup/Preferences, including all Third Party Links, Office Pictures, Appointment Reminders, People and File display settings.
- Some Firm Settings, including Accounting configurations and Backup.
- User passwords less than 8 characters—A default value of “password” is substituted.
- Group Calendar Profiles and Custom Tasks Profiles—New options are available.
- Standard Reports—A new set of standard Reports is provided.
- Custom Reports.
- Document Assembly Custom Map files—See the reclassification note above.
- Spell Check User Dictionaries.
- E-mail Signatures—Premium Edition uses your Outlook signature.
- Auto-Text entries.

(Some of the above might not be applicable to your earlier version of Amicus.)



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