

Conversion Guide: Converting from Amicus Small Firm

Who should use this Guide:

- Firms who are upgrading to Amicus Attorney from Amicus Small Firm (later than Version 5.1.1).
Do not use this Guide if converting from an earlier version—you will require Conversion Services.

Need Assistance? Contact Amicus Professional Services at 800-472-2289 or 416-977-6633.

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What you need to know about Conversion

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



IMPORTANT: Because conversion will **OVERWRITE** any data previously entered in Amicus Attorney, 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. However, there are several important considerations to note before running Amicus Attorney and an earlier version simultaneously:

- Users should only use the “core” functions in Amicus Attorney 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. This might result in loss and/or corruption of data.
- Do not install the Amicus Merge Toolbar as this will overwrite earlier version macros.
- Data entered in Amicus Attorney 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.

For a description of how data is converted, read “What happens during conversion” on page 5.

Preparing for conversion

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

In your PREVIOUS version of Amicus:

- 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 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.)



IMPORTANT: If Amicus is configured to integrate with **PCLaw, QuickBooks, or Amicus Small Firm Accounting**, we recommend that you run the **Accounting Integration Consistency Checker**. This utility enables you to test your Amicus database for data inconsistencies, and directly open any problem Files for viewing and/or editing. For details, see the *Accounting Integration Consistency Checker* document, available from the [Amicus Attorney Technical Resource Guides/Updates](#) section of our website.

- Disable **Amicus TimeTracker** access for all Team Members (from their User Profile).
- 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 Amicus Administrator. This repairs possible inconsistencies in the database. Disable User Access Control (UAC), and restart the computer BEFORE performing the Scan Database. You may re-enable UAC afterward.



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`

What you need

- Amicus Attorney installed on your server. Refer to the *Install Guide* for complete instructions.
- Download and install the applicable [Microsoft SQL Server 2005 Backward Compatibility Components](#) package at your Amicus Database Server (where SQL Server is installed). Expand the "Install Instructions" section, go down to the "Microsoft SQL Server 2005 Backward Compatibility Components" subsection and:
 - if *32-bit Windows*, download the X86 Package (SQLServer2005_BC.msi)
 - if *64-bit Windows*, download the X64 Package (SQLServer2005_BC_x64.msi)

- A **C:\ drive** is required on the Amicus Attorney Application Server for temporarily storing conversion configuration information.
 - Ensure the computer has a C:\ drive and you have read/write permissions.
 - Disable User Account Control (Windows Firewall) for the duration of the conversion process.
- During the conversion process, we recommend that the drive on which your Amicus Attorney database will be located has free disk space equal to twice the size of your database. After conversion, your Amicus Attorney database will be slightly larger than your previous database.
- If your **Team Database folder** (e.g. AMICUS ATTORNEY SMALL FIRM CLASSIC TEAM) is on a different computer than your Amicus Attorney Application Server, map a drive on that Server to your database folder.

Running the Converter



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

- 1** Ensure that all Amicus Attorney users, including you, are logged out.
- 2** Close any other programs also running in Windows on the Amicus Attorney Application Server.
- 3 Launch the Small Firm Converter**—At the Amicus Attorney Application Server, go to the Windows Start menu and choose All Programs > Amicus > (Amicus Attorney Tools >) Small Firm Converter. Your current Amicus Attorney database will be automatically backed up and the clean, startup Amicus Attorney database will be restored.
- 4 Specify the** location of your Team Database folder.
- 5 User Mapping**—If applicable, map the user entered as part of the Amicus Attorney Server install to the corresponding Team Member in your previous version of Amicus Small Firm. All unmapped Team Members will be automatically added as new Firm Members in Amicus Attorney.



NOTE: If no names appear in the lists, click Cancel and retry.

- 6** 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.
- 7** 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 Server\MSSQL\DatabaseConverter` folder. Click OK. For assistance, please contact Amicus Professional Services.



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

Read the “What happens during conversion” section below. Then log in to Amicus Attorney 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 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 Amicus Attorney are not removed during conversion. Your previous document templates have been copied to the following folder:
`\Amicus\Amicus Attorney 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 Amicus Attorney. (This will result in them appearing twice in People On The File lists.) Amicus Attorney 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 Amicus Attorney. Due to differences in the Amicus Attorney 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 Amicus Attorney 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 Server\DocumentAssemblyTemplates\Convert1

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 Amicus Attorney.

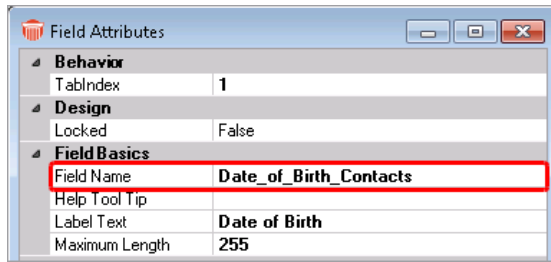
File Types—Any File that does not have a File Type assigned is converted with the File Type “Other” assigned.

Billing Categories and Rates—Amicus Attorney supports Time Tracking rates on Fixed Fee, Contingency, and Non-Billable Files. During conversion, two Billing Categories (“Contingency”, “Fixed Fee”) and a Billing Rate (“File Fee”) are added in your Firm Settings. In Open Files, Unposted Time Entries on Open Files, and Posted Time Entries on Open Contingency Files, these fields are converted as appropriate, with the “Normal” or “Other” Billing Rate assigned as a Tracking Rate where necessary.

Library—Personal Library Page Types and Personal Keywords are not supported in Amicus Attorney. 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—Amicus Attorney 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. Also note that Text Custom Fields are converted to Memo Custom Fields in order to avoid truncation of data.



WARNING: Microsoft Word merge imposes a limitation of 40 characters on merge fields. You may need to change any Field Names that are longer than this after conversion, while ensuring that they remain unique. To rename a Custom Field, open its Field Attributes dialog from the Custom Page Designer. And perform a test merge of any converted templates using your renamed fields.



TIP: Amicus Attorney 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.

Merge Template Map Files—Amicus Attorney ships with a “Version V And Below Map” and a “Combination Map”. These Maps are applicable to firms upgrading from Small Firm, 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 Amicus Attorney merge variables to your converted templates, assign the “Combination Map” (which includes those variables).



TIP: The number of fields included in an assigned Map might affect document assembly or e-mail merge performance. To improve performance for an individual template, use the Template-Specific Output option in the Merge Template. For details on setting this option in existing templates, see the *User Help*.

Merge Template Groups—Your Master Document Groups are converted to Merge Template Groups with the prefix “Convert1 - ” to avoid any confusion of your previous templates with the ones that ship with Amicus Attorney.

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 Amicus Attorney (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, Time Entry formatting, 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.
- 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—Amicus Attorney uses your Outlook signature.
- Auto-Text entries.

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

We recommend that all Firm Settings and individual Preferences be reviewed following conversion to ensure that your Amicus environment is configured to suit your requirements.



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