



WORKSTATION UPGRADE GUIDE

Omega Legal
Version 6.x

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5.52 to 6.5 Upgrade Instructions

If you are upgrading from Omega Legal version 5.52 to 6.5, you will need to uninstall the previous version of Omega Legal software. After that is complete, you will run the **setup.exe** file to install version 6.5. Before starting this process, be sure all other applications are closed as you might be required to reboot the workstation after the installation.

NOTE: You must have Local Administrator rights to perform this installation. If you are installing on MS Vista, Windows 7, or on a Windows 2008 Terminal Server, you will need to **disable the UAC** security function before installing Omega (located on the **Windows Control Panel** under **Users**).

Omega will place all installation files contained on the Workstation Installation CD in a folder named **OmegaInstalls** on your Omega server's data drive. Use either the files located in the **OmegaInstalls** folder on your Omega server or the files on the CD for workstation installation.

1. Uninstall your previous version of Omega Legal software.
2. To install Omega Legal version 6.5, run **setup.exe**, located in the **\OmegaInstalls\Omega Workstation CD** folder on the Omega server;

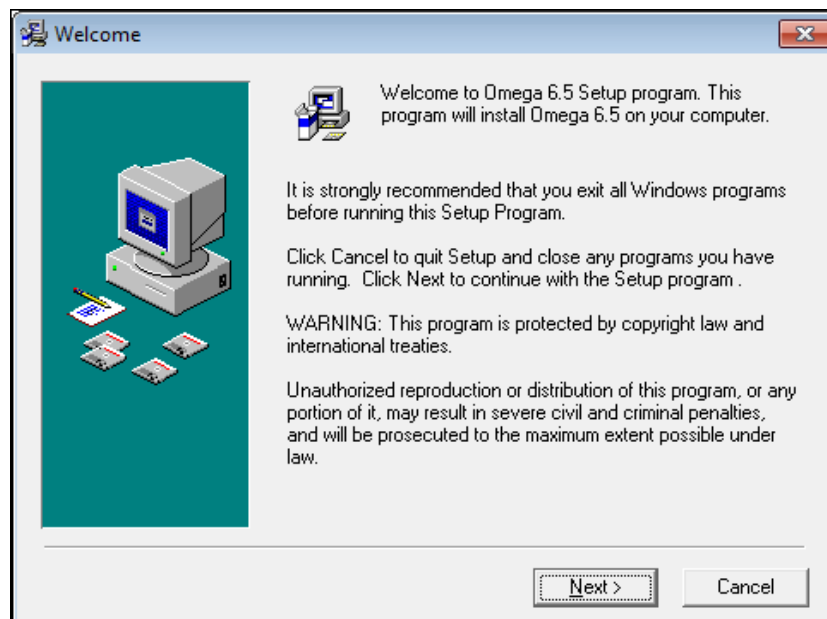
or

Using the Workstation Installation CD, click **Start** on the Windows Task Bar, and then choose the **Run** option. The **Run dialog box** is displayed (in Vista and Windows 7, type **run** in the **search** field and press ENTER).

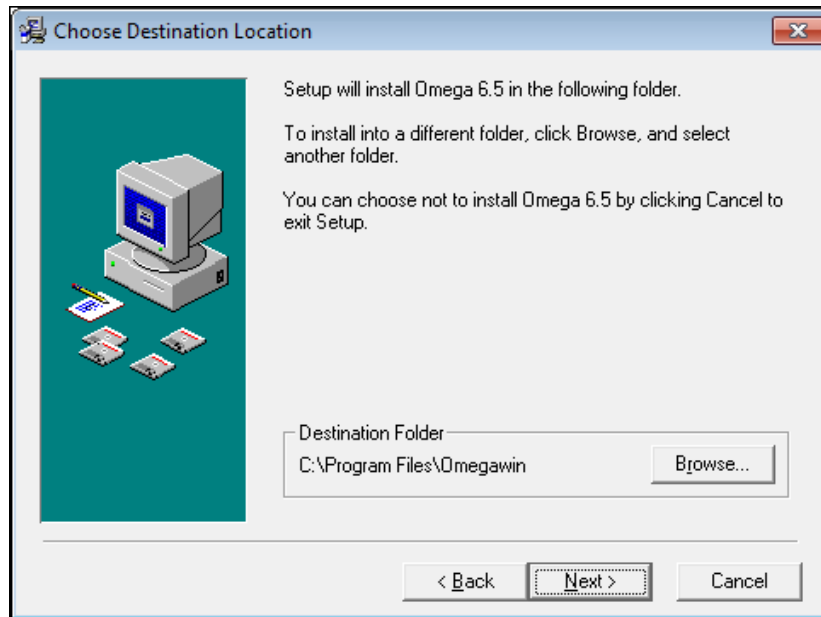
Type the following in the **Open** field, where D is the CD drive letter: **D:\Setup**

Click **OK** or press ENTER.

The **Welcome** dialog box for the Omega Legal 6.x Setup program is displayed.



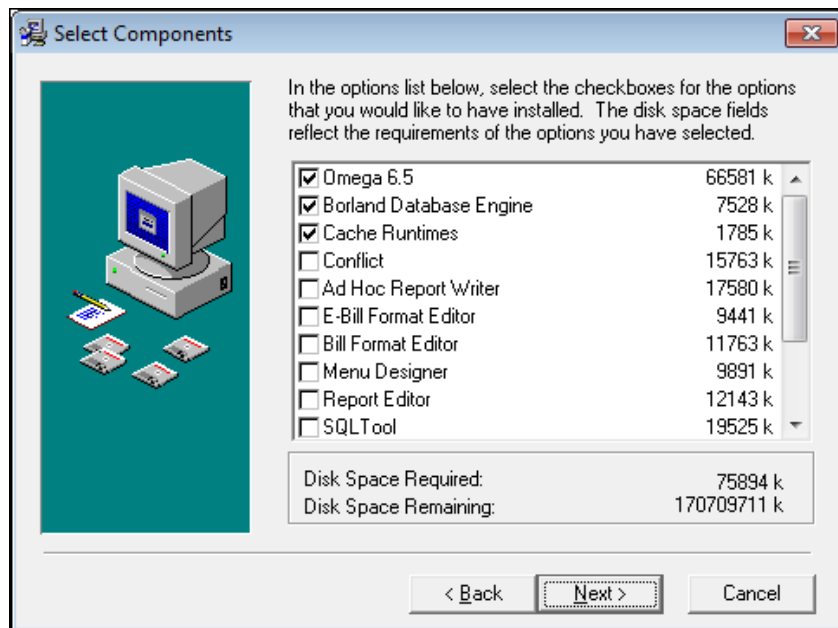
3. Click **Next** to continue. The **Choose Destination Location** dialog box is displayed.



NOTES:

1. Do not change the drive or directory unless instructed to do so by Omega support personnel.
2. During the installation process, files that are loaded may already exist on the computer. Whenever this occurs, a copy of the existing file is placed in the backup directory so that it is available if an Uninstall or Rollback is performed.

4. Click **Next** to continue. The **Select Components** dialog box is displayed.



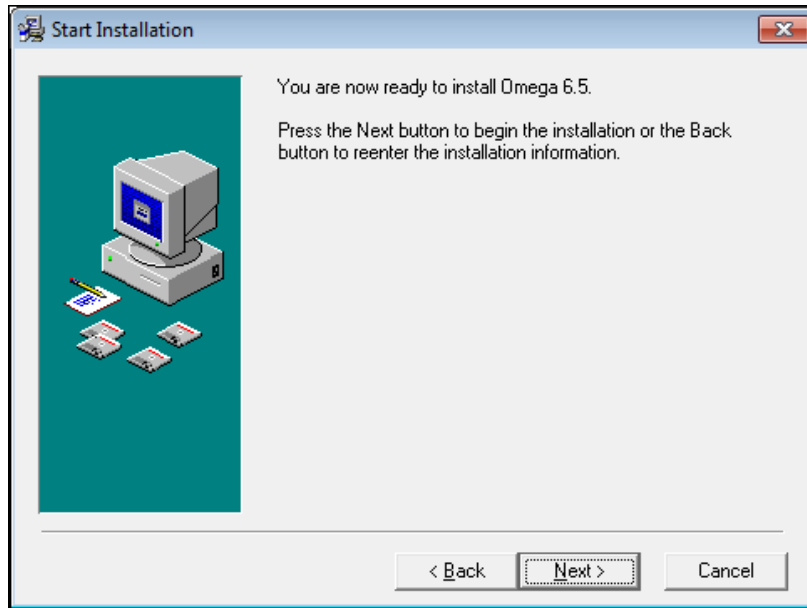
5. If you will be installing additional Omega products on this workstation, choose the appropriate checkbox(es) on the Select Components dialog box:

NOTE: The minimum requirements to run Omega Legal are selected by default (Omega Legal 6.x, BDE, and Cache Runtimes).

- Conflict
- Ad Hoc Report Writer
- SQL Tool
- Menu Designer
- Bill Format Editor
- E-Bill Format Editor
- Cash to Accrual
- 1099 Misc
- Reset Next Matter Suffix
- Report Editor

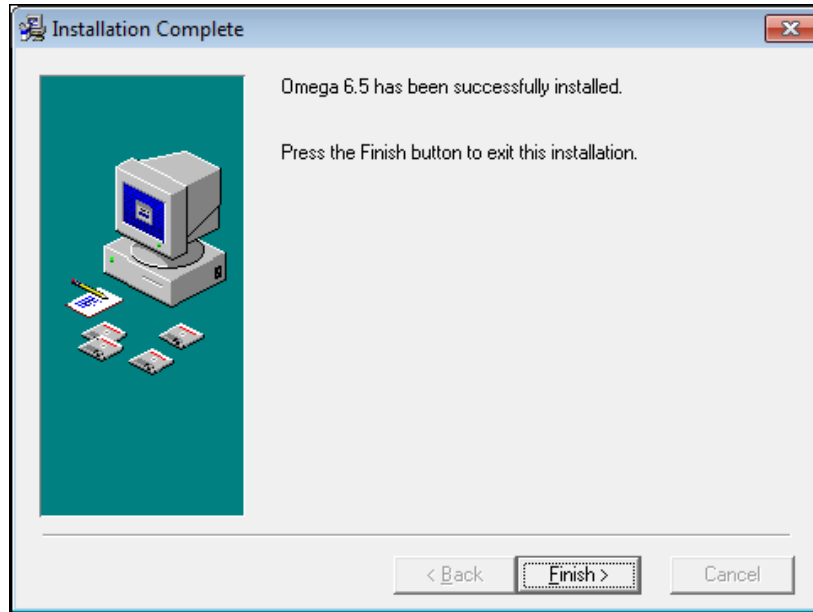
NOTE: The existing disk space available on the workstation and the amount of space required to load Omega Legal is noted in the middle of the dialog box. If the space available is not adequate, do not attempt to proceed.

6. Click **Next** to continue, if the disk space is adequate. The **Start Installation** dialog box is displayed.



NOTE: Click **Back** to reenter any information.

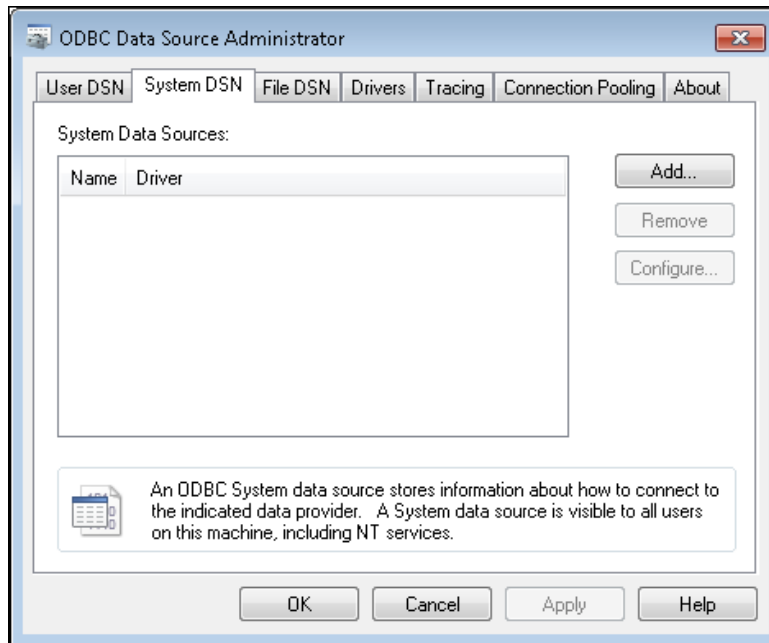
7. Click **Next** to continue. The Omega Legal 6.x Setup will install with the options selected to the directory chosen.



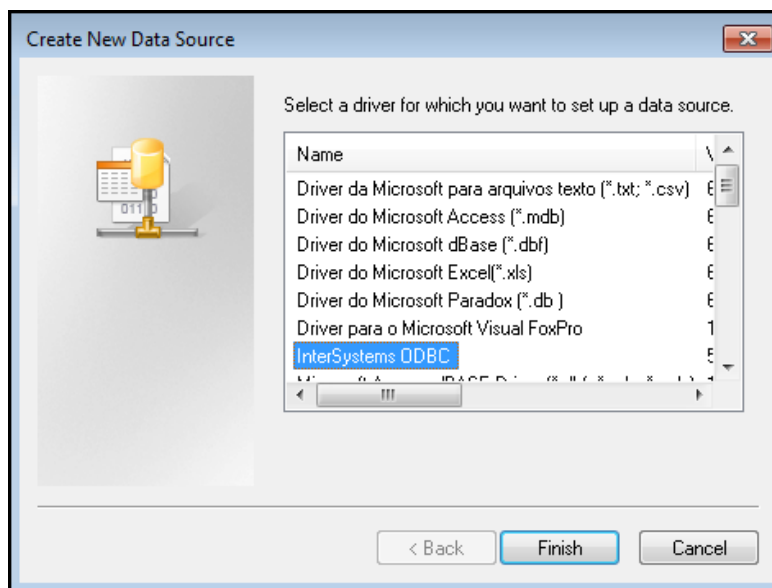
8. Click **Finish**. The installation is complete.

Configuring the ODBC Entry

1. Click **Start** on the Windows Task Bar, and then choose **Settings**, and then **Control Panel**. The **Control Panel** dialog box is displayed. (In 64-bit operating systems, you must run the **32-bit ODBC Administrator** by launching **ODBCAD32.EXE**, found in **C:\Windows\SysWOW64**.)
2. Select **Administrative Tools - Data Source (ODBC)**. The **ODBC Data Source Administrator** dialog box is displayed.
3. Select the **System DSN** tab.

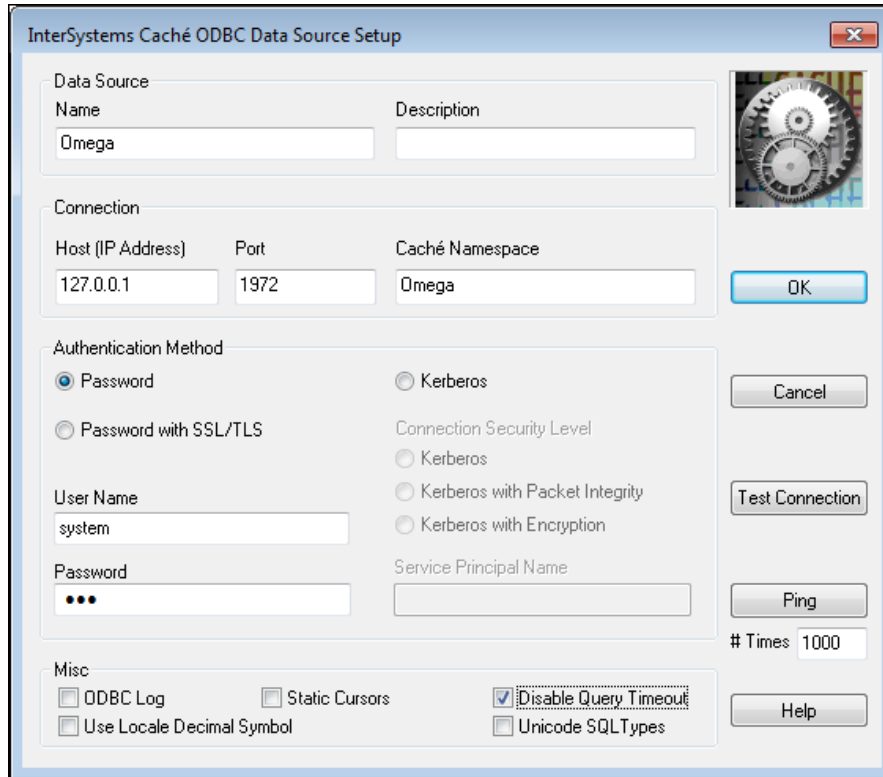


4. Click the **Add** button. The **Create New Data Source** dialog box is displayed.



- From the list of drivers displayed, select InterSystems Caché ODBC driver, version 5.00. Click **Finish**.

The **InterSystems Caché ODBC Data Source Setup** dialog box is displayed.



- Type **Omega** as the **Data Source Name**. The **Description** field is left blank.
- Enter the IP address or Network name of the Caché Server in the **Host (IP Address)** field.
- Make sure the **Port** field is 1972. Do not modify this number.
- Type **Omega** in the **Caché Namespace** field.
- Type **system** in the **User Name** field.
- Type **sys** in the **Password** field.

NOTE: The User Name and Password must be entered in lowercase.

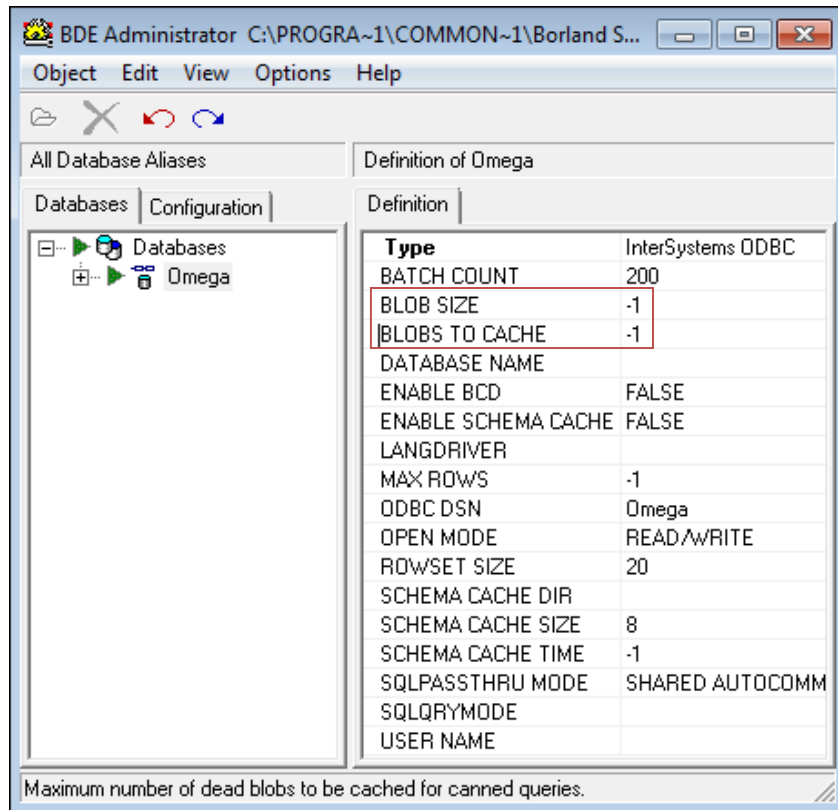
- Check the **Disable Query Timeout** checkbox.
- Click **Test Connection**. A message displays confirming whether or not the test was successful. If the test was unsuccessful, then verify the information entered, beginning with step 6 through 11. Once a successful test displays, proceed with step 14.
- Click **OK**.

NOTE: If you have more than one namespace, repeat steps 4-14 for each namespace, replacing *Omega* in steps 6 and 9 with the namespace's name.

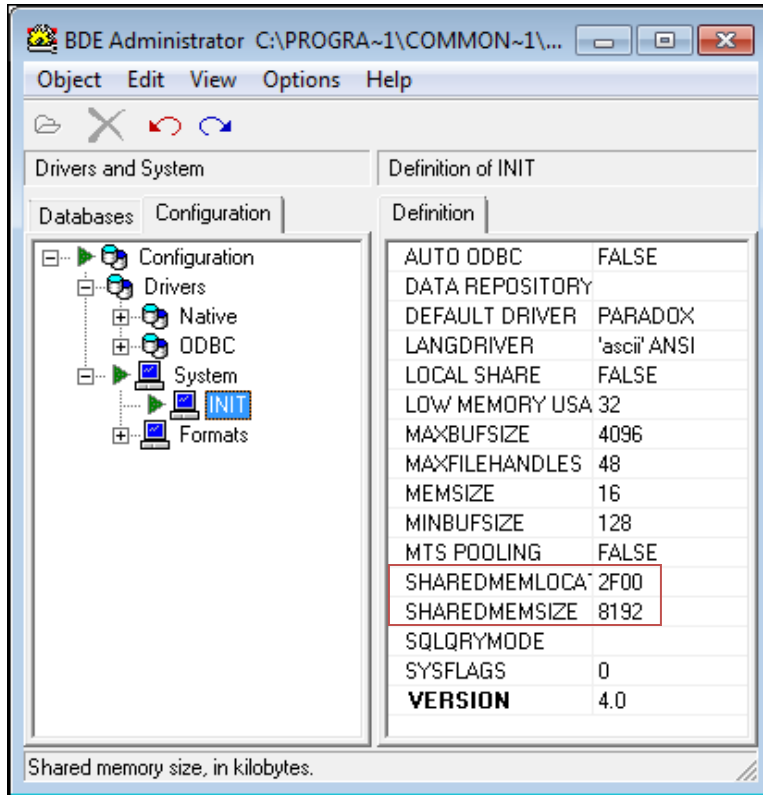
- Click **OK** to close the **ODBC Data Source Administrator** dialog box.

Configuring the BDE Settings

1. Click **Start** on the Windows Task Bar, and then choose **Settings**, and then **Control Panel**. The **Control Panel** dialog box is displayed. Open the **BDE Administrator** (you may need to switch to Classic view to locate the BDE Administrator).
2. Click the **Databases** tab, and then select the **OMEGA** entry from the list on the left pane of the window.
3. Change the **BLOB SIZE** setting to **-1** and the **BLOBS TO CACHE** to **-1**. Make sure you click out of the last field edited to any other field or the change is not saved.



4. You must also adjust two settings found on the Configuration tab within the BDE Administrator. On the **Configuration** tab, go to the **INIT** option under System. On the **Definition** tab in the right pane of the window, change the **SHAREDMEMSIZE** setting to **8192**. Also, set the **SHAREDMEMLOCATION** to **2F00**.



5. Close the BDE Administrator, and click **Yes** on the Save option upon exit.

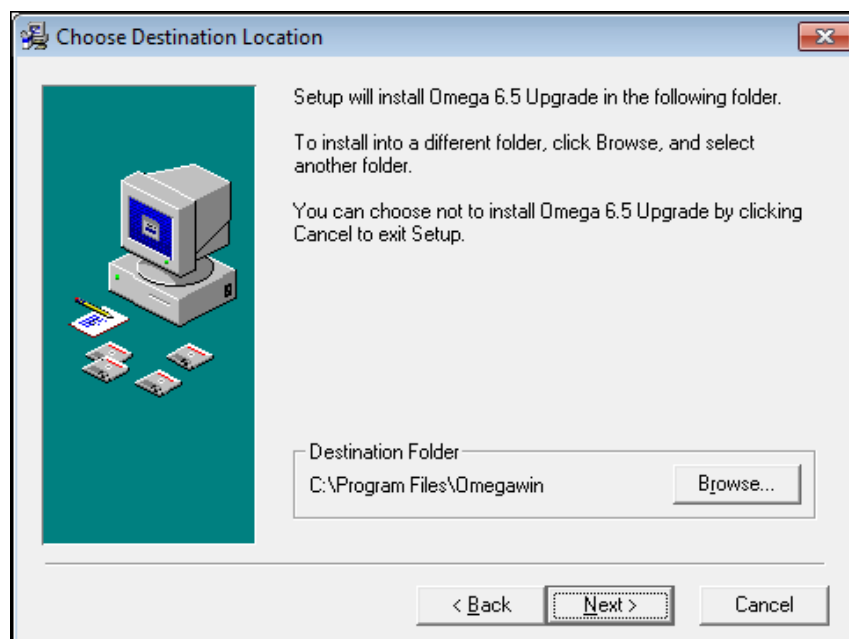
NOTE: If you have problems, contact Client Services at Omega Legal Systems.

6.x to 6.5 Upgrade Instructions

If you are upgrading from Omega Legal version 6.x to 6.5, you will only need to run the **UpgradeOmega65.exe** file. Omega will place this file in a folder named **OmegaInstalls** on your Omega server's data drive.

1. To upgrade Omega Legal to version 6.5, run **UpgradeOmega65.exe**, located in the **\OmegaInstalls\Omega Workstation CD** folder on your Omega server.

The **Choose Destination Location** dialog box is displayed.

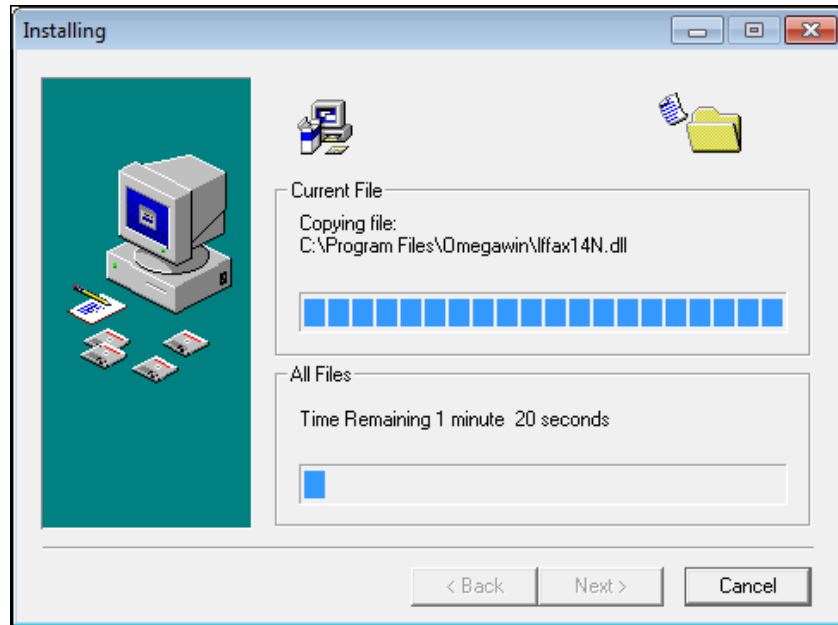


NOTES:

1. Do not change the drive or directory unless instructed to do so by Omega support personnel.
2. During the installation process, files that are loaded may already exist on the computer. Whenever this occurs, a copy of the existing file is placed in the backup directory so that it is available if an Uninstall or Rollback is performed.

2. Click **Next**.

The upgrade installation files are copied to the workstation.



3. Click **OK**. Relaunch Omega Legal to complete the upgrade.

