



INSTALLATION GUIDE

Omega Legal Workstation Version 6.x

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Introduction

Overview

This guide provides instructions for installing the Omega Legal System Client software on computers running Microsoft Windows XP SP2, Vista, or Windows 7 (32- or 64-bit operating systems).

This software is intended for installation on each workstation's local hard drive, and requires 80mb to 200mb of available space. If this is not possible, or if the hard disk space is not available, do not begin the installation process; instead, contact Omega Customer Support and review the process with them.

The Caché server is configured to provide SQL access to the Omega Legal database as a normal part of installation/configuration. The Omega Legal DSN that is setup as part of this workstation installation provides access to your Third Party SQL Tools.

About this Document

This guide is divided into multiple sections. The *Omega Legal Workstation Software Installation* section is essential to the installation and operation of the Omega Legal software.

The remaining sections provide assistance in various areas that may or may not pertain to your specific installation:

- Visual *Xpress* Workstation Installation
- Installation Instructions for Omega's .NET Ancillary Products

Screen samples are provided as checkpoints along the way. Please read all instructions and do not attempt to perform the installations by following the examples, as they are not intended to illustrate the entire process. The entries used on the samples are for example only; your entries are specific to your firm.

When you are installing the Omega Legal System Client software, you need to indicate whether you want to load certain Omega Legal Utilities software on the individual computer. If you choose to do so, you will have the opportunity to select which utilities you wish to load during the installation. Consult with your in-house project coordinator and Omega customer support to determine if, when, and where this software should be loaded.

Omega Legal Workstation Software Installation

Installation Tasks

Your Omega Legal workstation software has been provided on a CD. If the CD is not in your local machine, then you must map a drive letter to the network location where you have placed the CD.

Complete the following steps to install the Omega Legal Systems Client software. 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 server's data drive. Use either the files located in the **OmegaInstalls** folder on your server or the files on the CD for workstation installation.

1. To install Omega Legal, run **setup.exe**, located in the **OmegaInstalls\Omega CD** folder on the server;

or

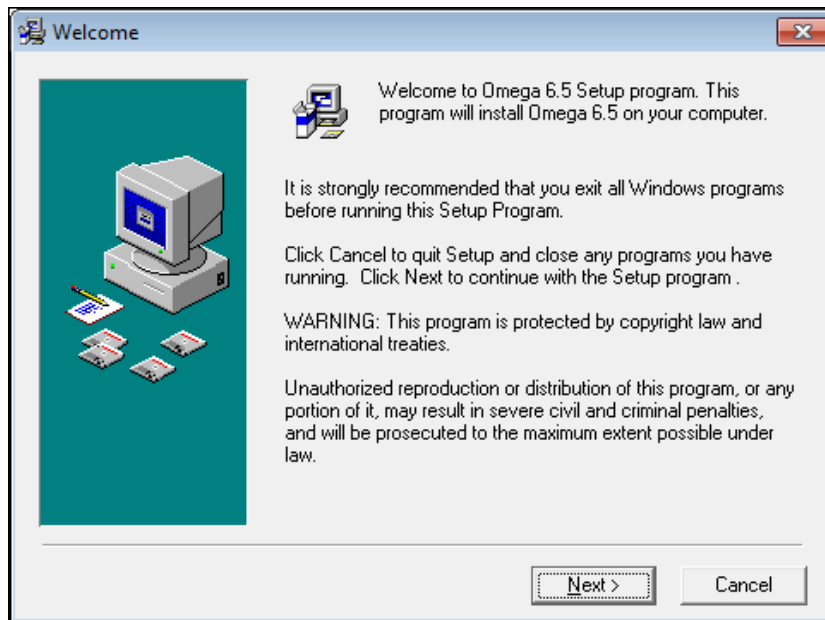
Using the Workstation Installation CD, click **Start** on the Windows Task Bar, and then choose the **Run** option. The **Run dialog box** is displayed (in Vista and Windows 7, type **run** in the **search** field and press ENTER).

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

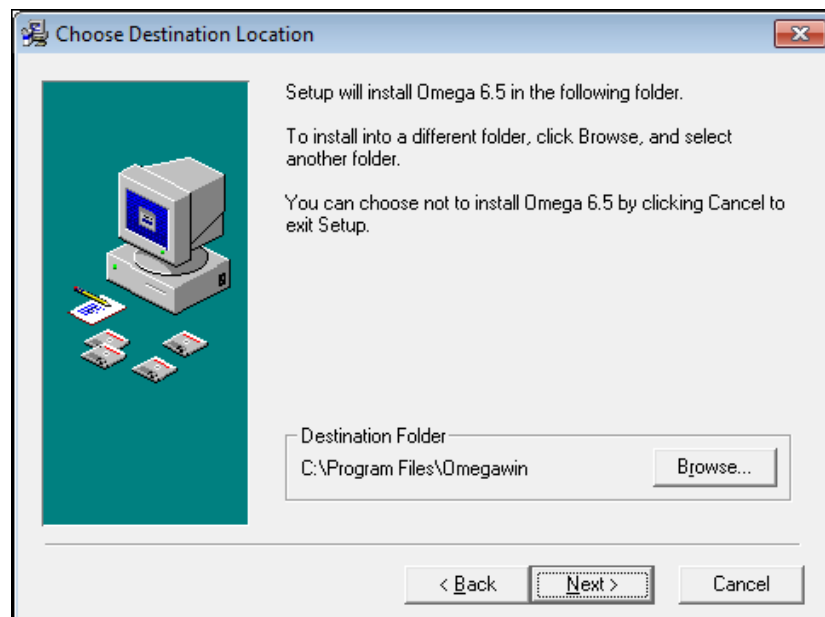
D:\Setup

Click **OK** or press ENTER.

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



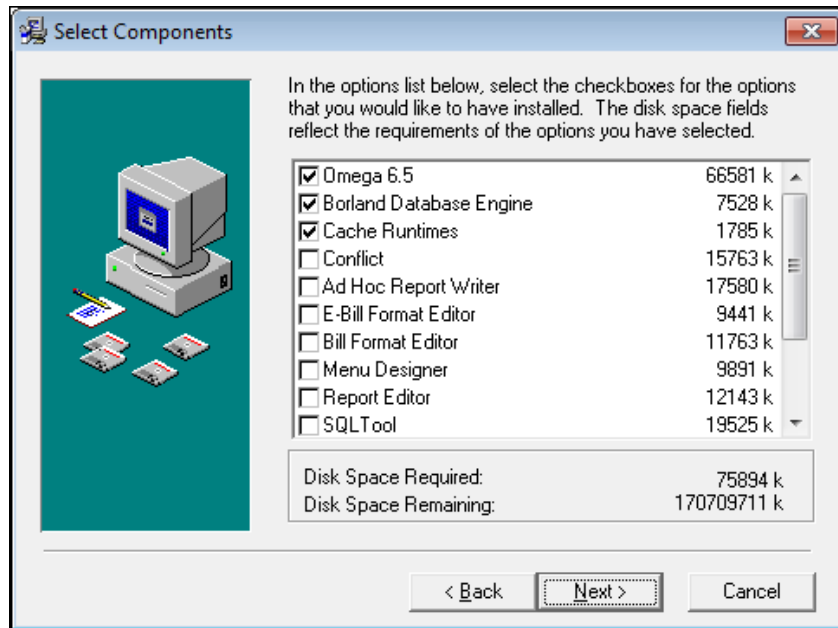
2. Click **Next** to continue. The **Choose Destination Location** dialog box is displayed.



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.

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



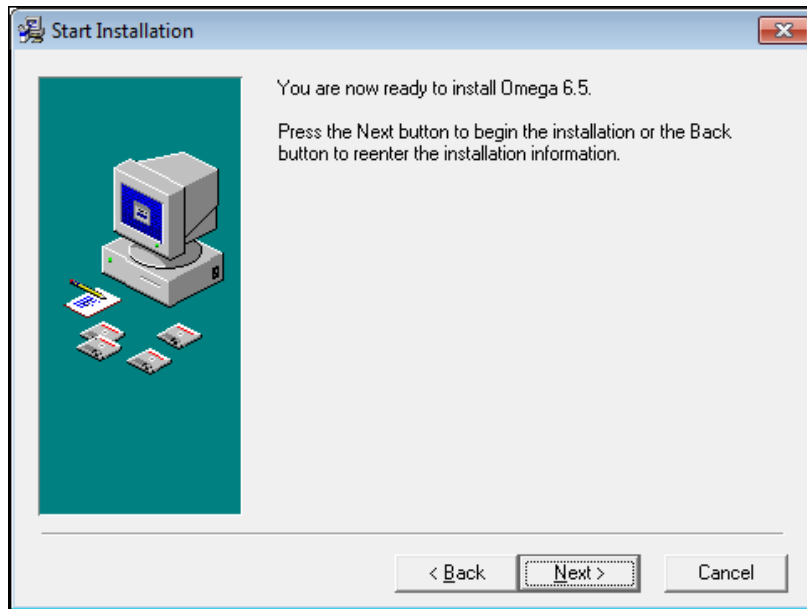
4. If you will be installing additional Omega products on this workstation, choose the appropriate checkbox(es) on the Select Components dialog box:

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

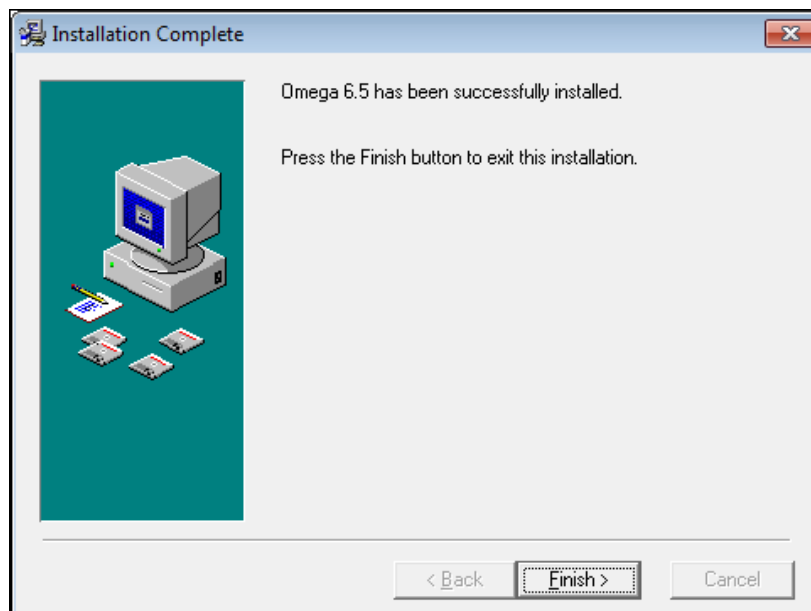
NOTE: The existing disk space available on the workstation and the amount of space required to load Omega Legal is noted in the middle of the dialog box. If the space available is not adequate, do not attempt to proceed.

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



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

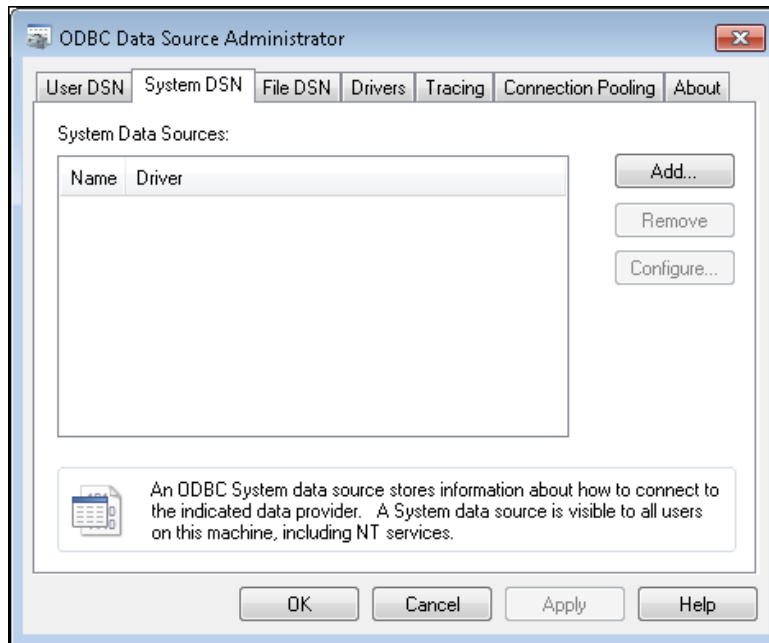
6. Click **Next** to continue. The Omega Legal 6.x Setup will install with the options selected to the directory chosen.



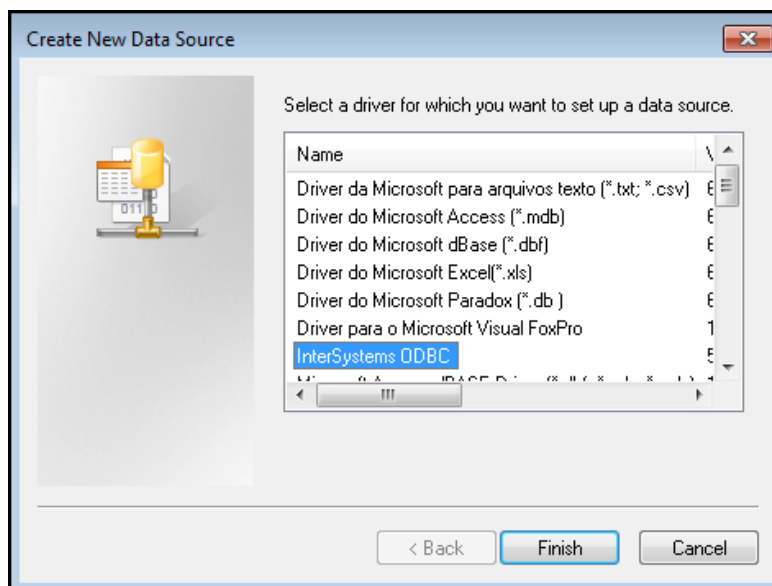
7. Click **Finish**.

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.

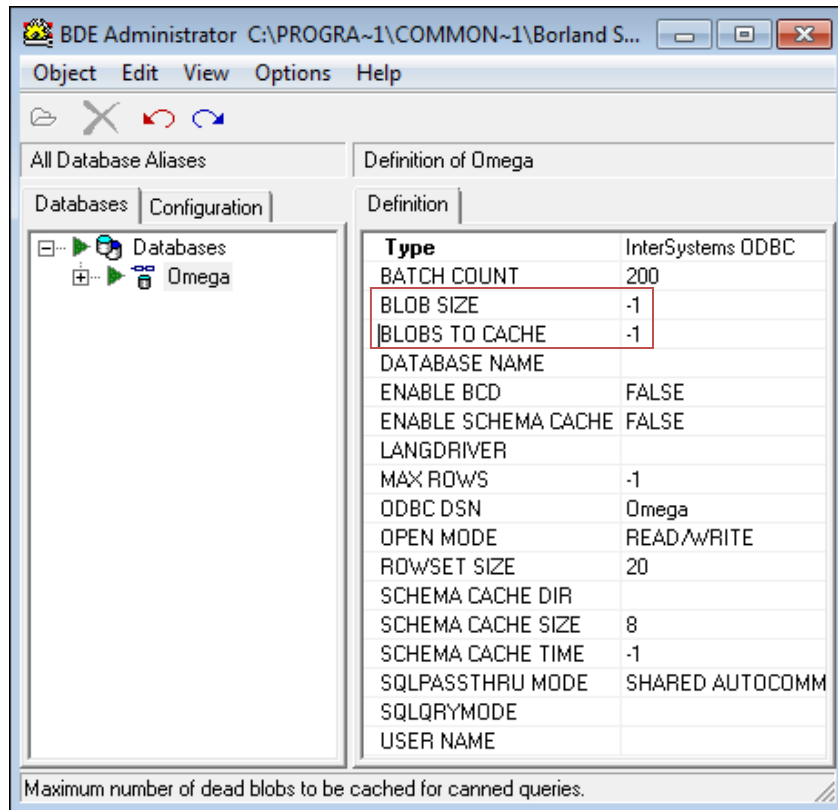
- Type **Omega** as the **Data Source Name**. The **Description** field is left blank.
- Enter the IP address or Network name of the Caché Server in the **Host (IP Address)** field.
- Make sure the **Port** field is 1972. Do not modify this number.
- Type **Omega** in the **Caché Namespace** field.
-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

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

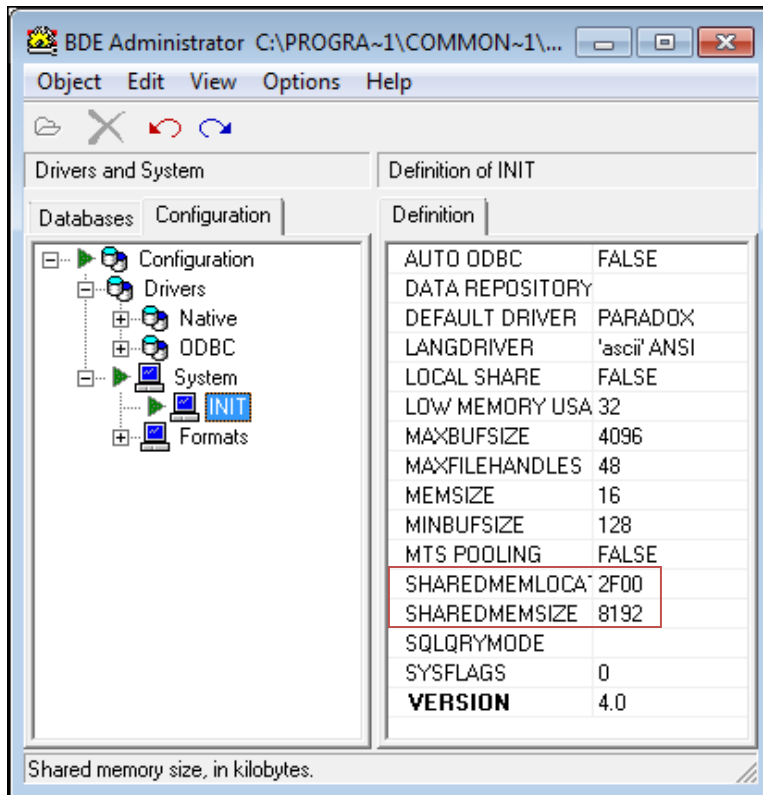
- Check the **Disable Query Timeout** checkbox.
- Click **Test Connection**. A message displays confirming whether or not the test was successful. If the test was unsuccessful, then verify the information entered, beginning with Step 6 through 10. Once a successful test displays, proceed with Step 13.
- Click **OK**.
- 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 may also need to 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**.

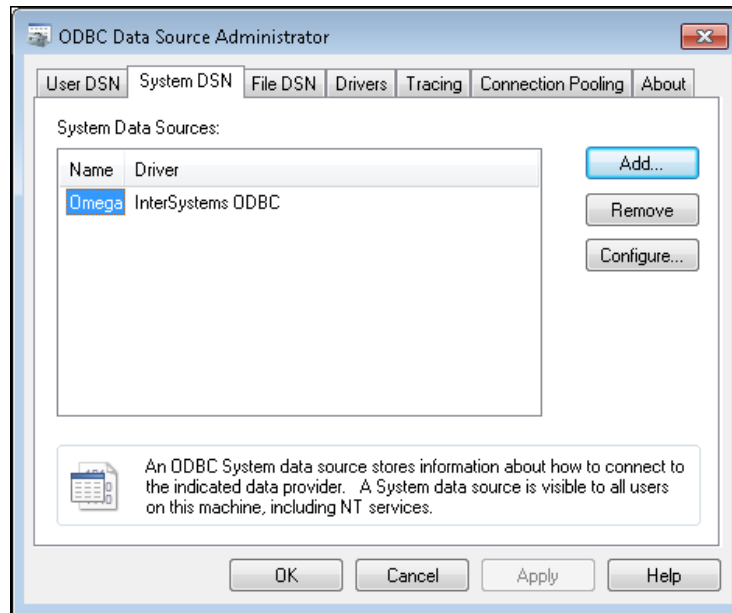


5. Close the BDE Administrator, and click **Yes** on the Save option upon exit.

NOTE: If you have problems, contact the Support Department at Omega Legal Systems.

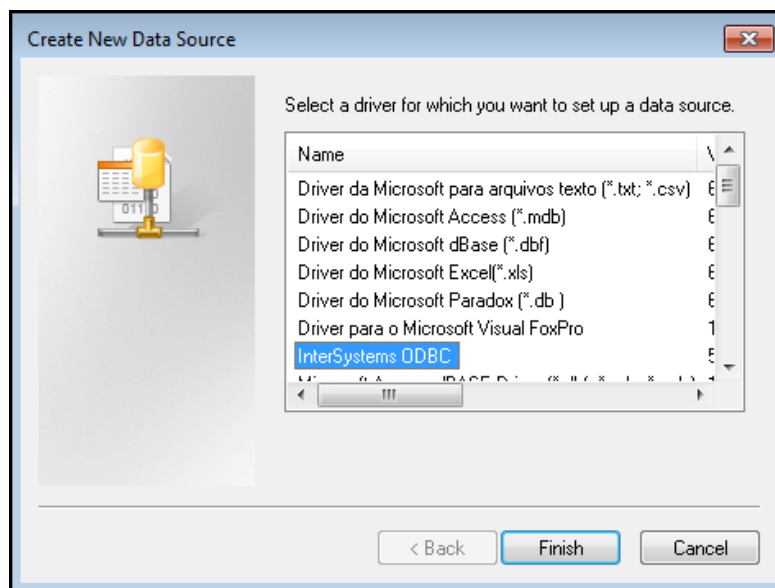
Set Up an Alternate Namespace for Omega Legal 6.x

1. From the **Start** menu, open the **Control Panel** in Windows.
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.



5. Select the **InterSystems ODBC (v5.00)** option, and then click **Finish**.

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

6. In the **Data Source Name** field, enter the name of the new Omega namespace. For the training namespace, enter **TRAIN**.
7. Enter the address of the NT/Caché Server in the **Host (IP Address)** field.
8. Enter the name of the additional Omega namespace in the **Caché Namespace** field. For the training namespace, enter **TRAIN**.
9. Enter **system** in the **User Name** field.
10. Enter **sys** in the **Password** field.

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

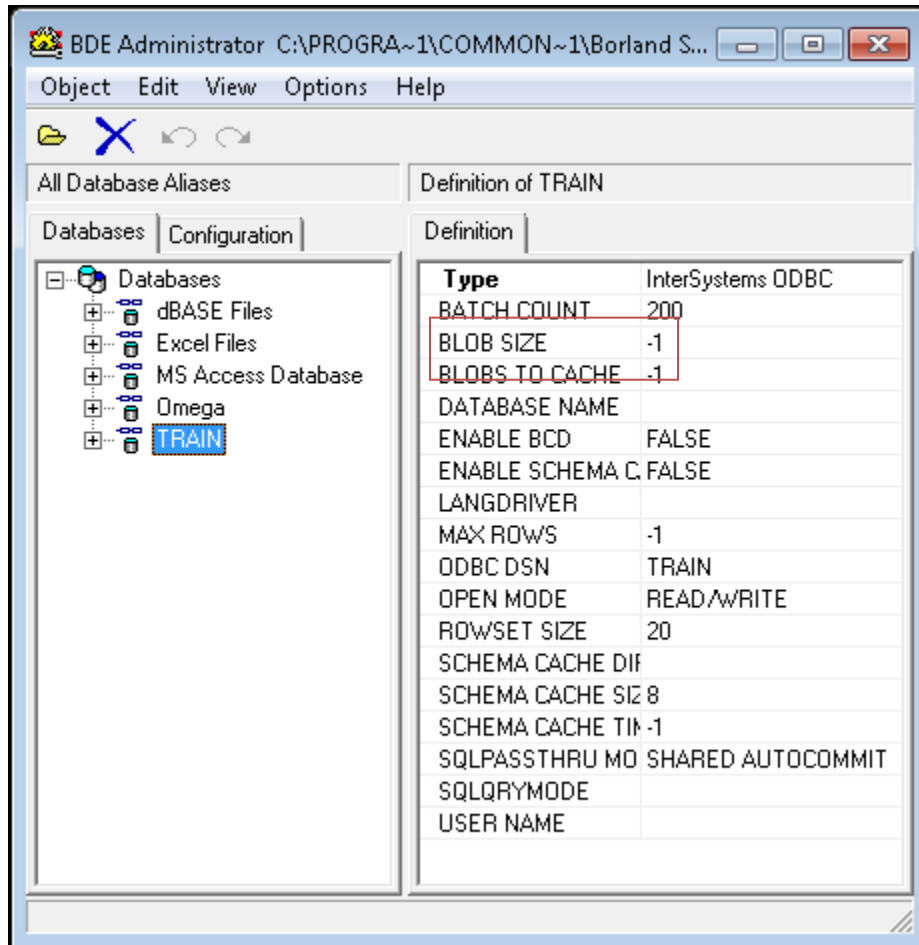
11. Check the **Disable Query Timeout** option.

The screenshot shows the 'InterSystems Caché ODBC Data Source Setup' dialog box. The 'Data Source' section has 'Name' set to 'TRAIN'. The 'Connection' section has 'Host (IP Address)' set to '127.0.0.1', 'Port' set to '1972', and 'Caché Namespace' set to 'TRAIN'. The 'Authentication Method' section has 'Password' selected. The 'User Name' field contains 'system' and the 'Password' field is masked with dots. The 'Misc' section has 'Disable Query Timeout' checked. Buttons for 'OK', 'Cancel', 'Test Connection', 'Ping', and 'Help' are visible on the right side.

12. Click **OK** to save the namespace and close the InterSystems Caché ODBC Data Source Setup dialog box.
13. Click **OK** to close the ODBC Data Source Administrator.
14. From the Control Panel, open the **BDE Administrator**.

15. With the **Databases** tab selected in the left pane, click once on the name of the new namespace you created.
16. In the right pane, change the **BLOB SIZE** and the **BLOBS TO CACHE** both to -1.

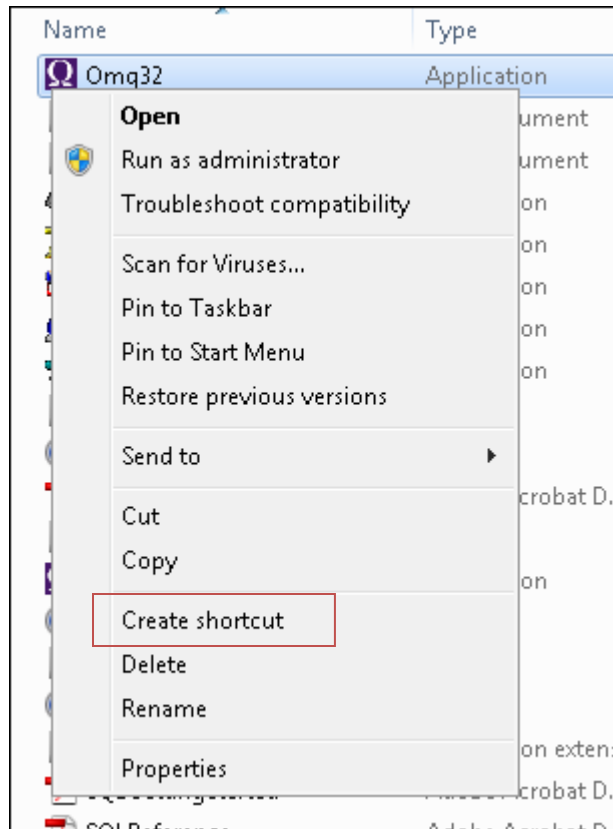
NOTE: Make sure you click out of the last field edited to any other field or the change is not saved.



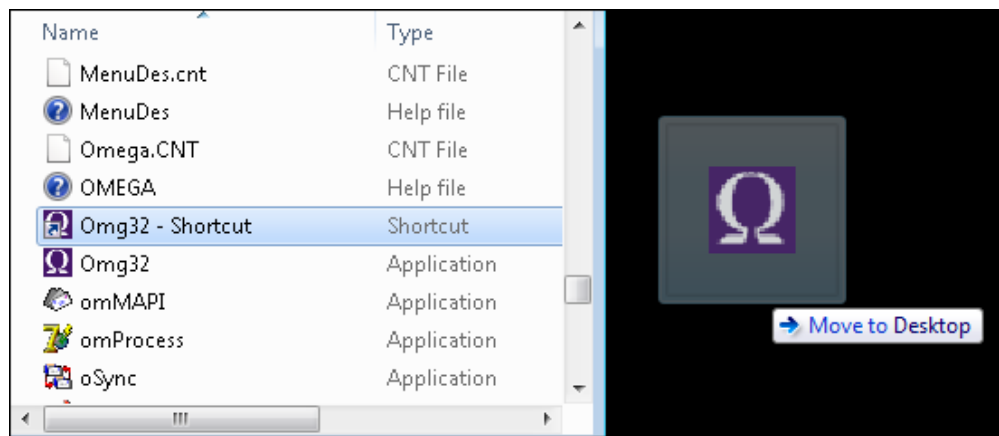
17. Close the BDE Administrator. Click **Yes** when you are prompted to save your changes.

Set Up a Desktop Icon to Launch Omega Legal 6.x with a New Namespace

1. Right-click on the Omega executable file, and then select **Create Shortcut** from the context menu. A shortcut file is created.



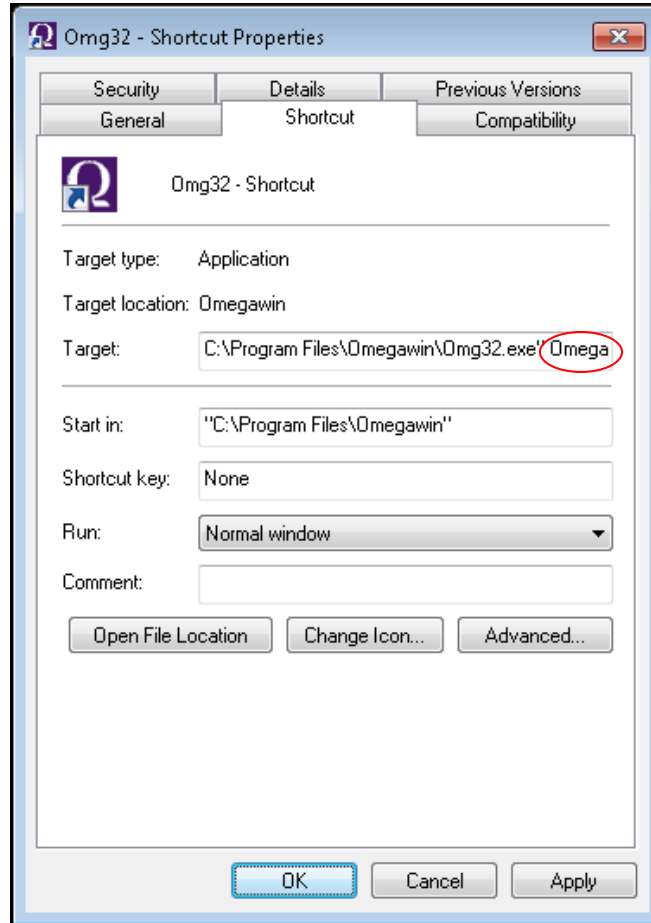
2. Drag the shortcut file to your desktop.



3. Right-click on the shortcut on your desktop that you just created, and select **Properties** from the context menu.
4. On the **Shortcut** tab, add the namespace that you are using to the end of the **Target** line, for example:

“c:\Program Files\omegawin\omg32.exe” TRAIN.

Where TRAIN is the name of the alternate Omega namespace.

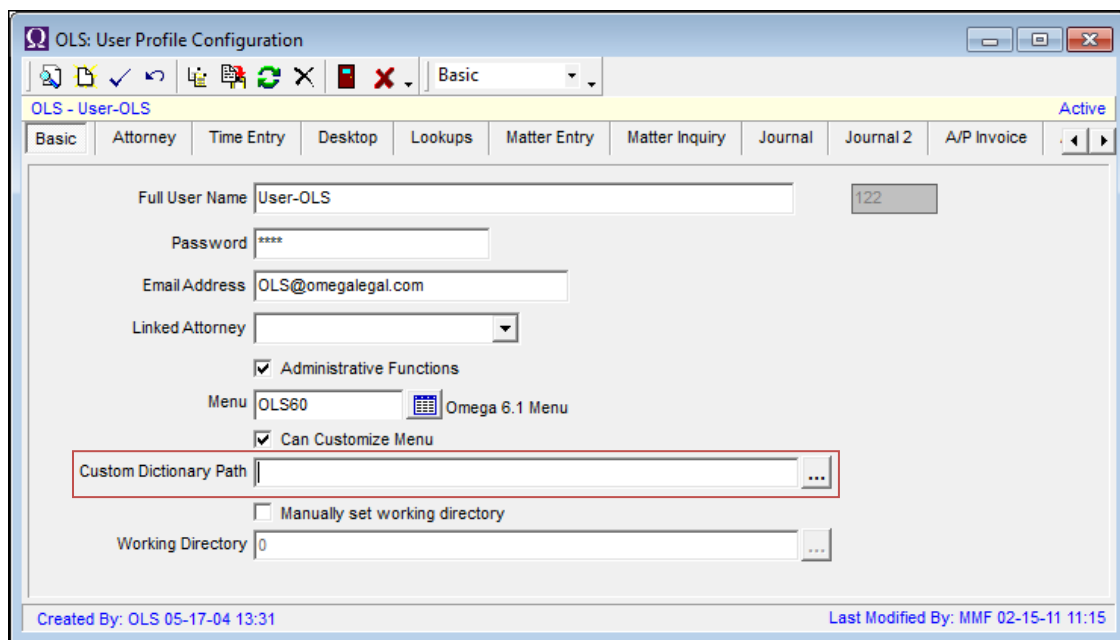


5. Click **OK** to exit the Properties dialog box.

Custom User Dictionary / AutoText in Omega 6.x

The custom user dictionary / AutoText files for the Omega 6.x spell check engine are stored on the local workstation in the Omega installation directory, usually C:\Program Files\Omegawin\. When moving a user to a new PC, or if a user accesses Omega from multiple PCs, the custom dictionary / AutoText files can be copied from the user's computer to the new location.

You can specify a location to store the custom dictionary / AutoText files in the **Custom Dictionary Path** field on the **Basic** tab in the **User Profile**. If the path specified for the custom dictionary / AutoText files is not referencing a local drive, then these files move with the user if they use a different PC.



The screenshot shows the 'OLS: User Profile Configuration' window with the 'Basic' tab selected. The 'Custom Dictionary Path' field is highlighted with a red box. The window contains the following fields and options:

- Full User Name: User-OLS
- Password: ****
- Email Address: OLS@omegalegal.com
- Linked Attorney: [Dropdown]
- Administrative Functions
- Menu: OLS60 [Omega 6.1 Menu]
- Can Customize Menu
- Custom Dictionary Path: [Empty field with browse button]
- Manually set working directory
- Working Directory: 0 [Browse button]

Created By: OLS 05-17-04 13:31 Last Modified By: MMF 02-15-11 11:15

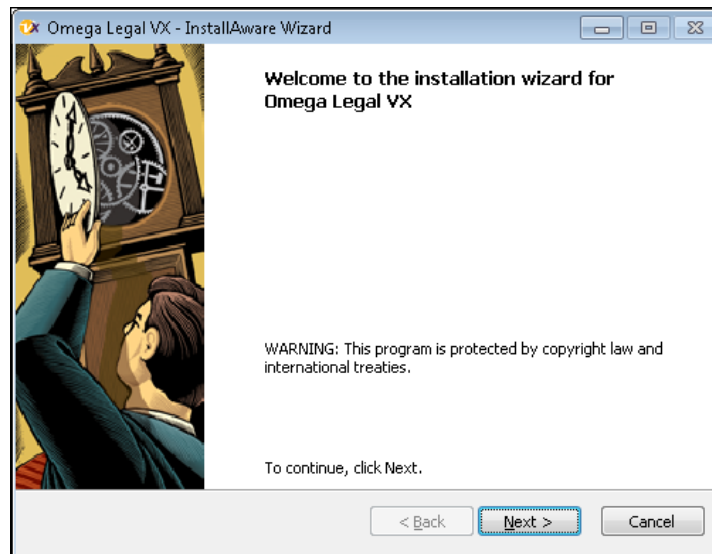
The custom user dictionary / AutoText files are the .ADU files in the Omega installation directory in the format of UserID.ADU, where the *UserID* is the Omega login name for the user.

Visual Xpress (VX) Workstation Installation

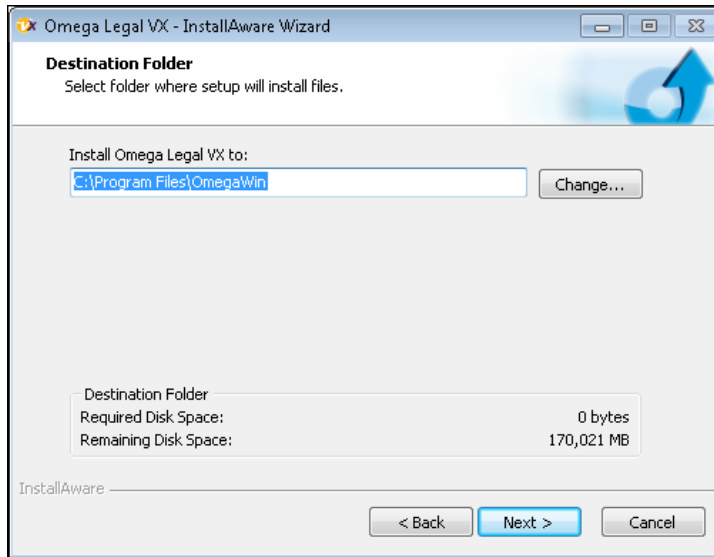
Complete these instructions when installing VX for the first time.

NOTE: Microsoft's .NET Framework 3.5 SP1 must be installed on any workstation that runs VX. If you are running Windows 7, .NET is already installed.

1. Run one of the following to install Tableau Software on the workstation:
 - For *VX Standard*, run **Omega Visual Xpress.exe** located in *Omega Install\VX 2.0 Professional* on your server or on the Omega Legal VX Standard CD. The Standard version is for those individuals who need to view VX dashboards and worksheets.
 - For *VX Pro*, run **Omega Visual Xpress.exe** located in *Omega Install\VX 2.0 Professional* on your server or on the Omega Legal VX Pro CD. The Pro version is for those individuals who need the ability to set up users and menus and make changes to the dashboards and worksheets.
2. Click **Next** to continue.

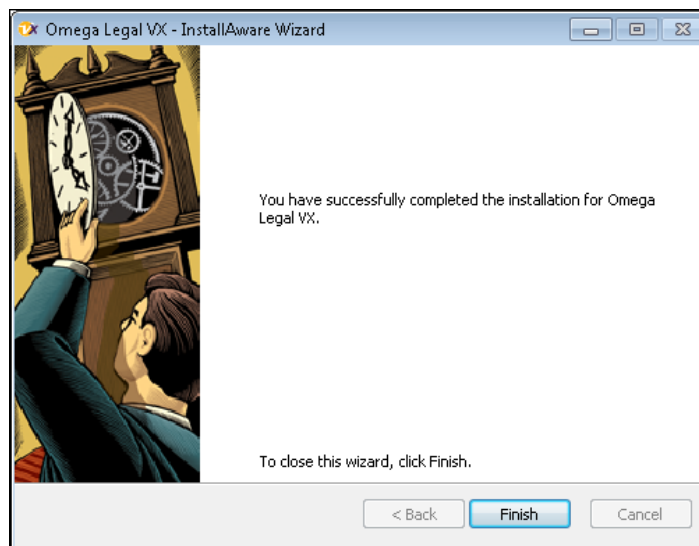


3. Select a **Destination Folder**, and then click **Next** to continue.



The Tableau Software application files are installed.

4. Click **Finish**.

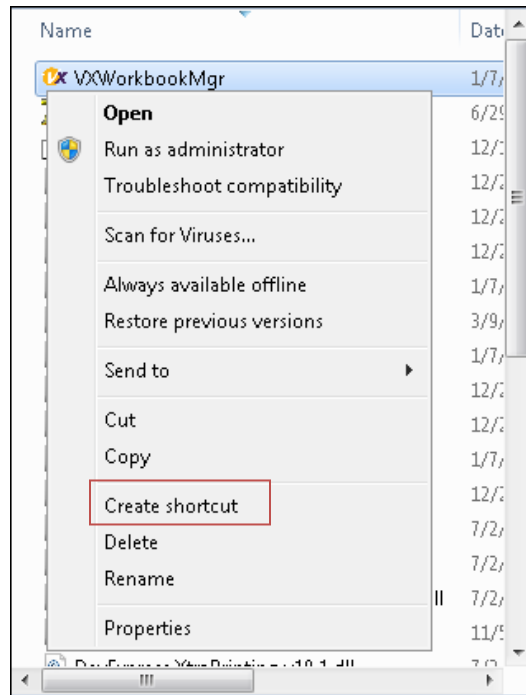


Agent VX and the VX Workbook Manager reside in a shared directory on your Omega server, so you will need to create a shortcut on the desktop that points to the shared location.

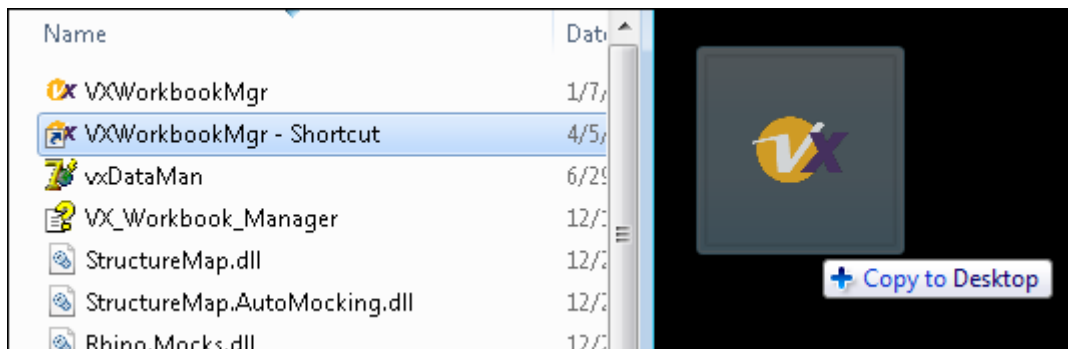
- For both *VX Standard* and *VX Pro* users, create a shortcut that points to Agent VX on your Omega server (typically, `\\ServerName\OmegaApps\VX\AgentVX.exe`).
- For *VX Pro* users, create a shortcut on the desktop that points to the VX Workbook Manager on your Omega server (typically, `\\ServerName\OmegaApps\VX\VXWorkbookMgr.exe`).

Complete the following steps to create a shortcut to AgentVX.exe or VXWorkbookMgr.exe:

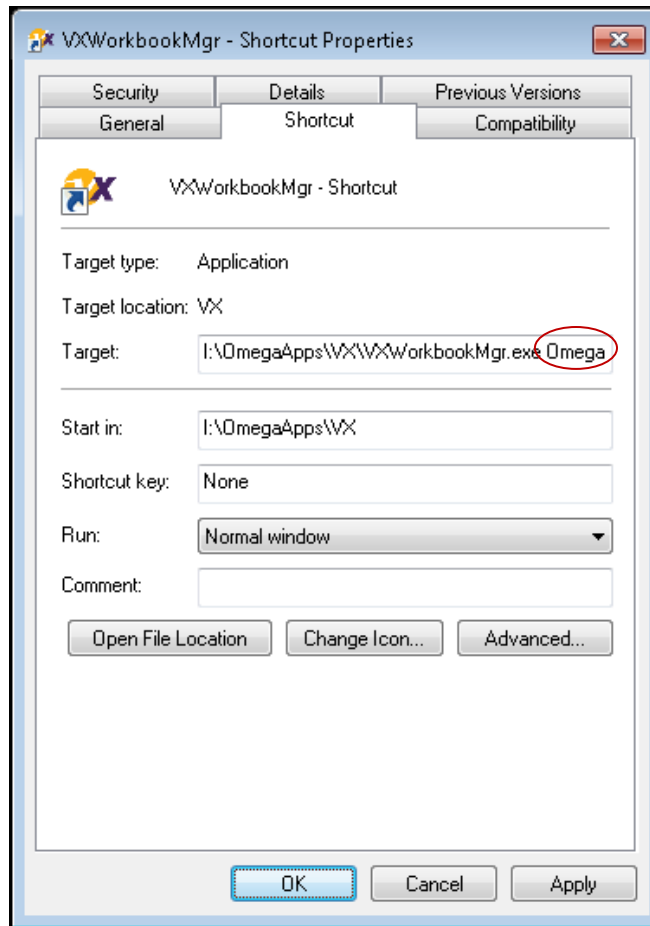
1. Right-click on the appropriate executable file, and then select **Create Shortcut** from the context menu. A shortcut file is created.



2. Drag the shortcut file to your desktop.



3. Right-click on the shortcut on your desktop that you just created, and select **Properties** from the context menu.
4. On the **Shortcut** tab, add the namespace *Omega*, or the namespace that you are using, to the end of the **Target** line.



5. Click **OK** to exit the Properties dialog box.

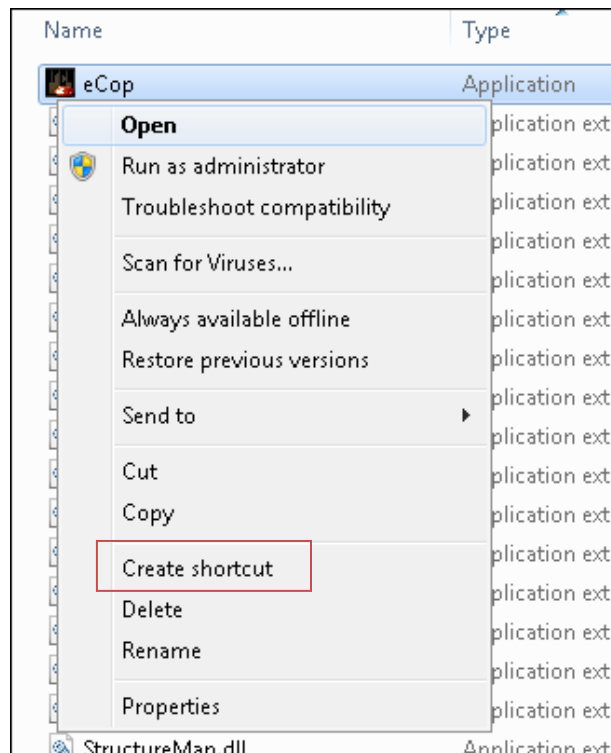
Installation Instructions for Omega's .NET Ancillary Products

Omega's .NET ancillary products (eCop, Imaging, Matter Intake, and Inline Expense Reports) do not have a workstation installation CD since all users may access the program from a single, shared location on the Omega server (typically, in the *OmegaApps* folder).

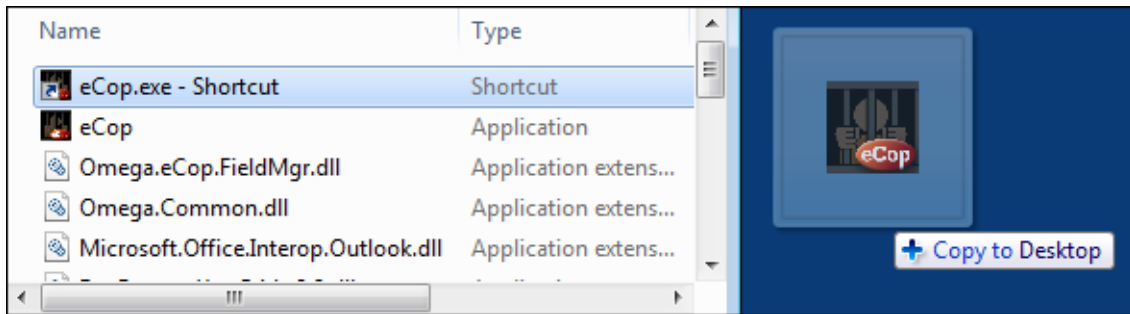
All that's required is a desktop shortcut that points to the appropriate executable file's location on the network.

NOTE: If your firm would like to purchase an ancillary product, please contact Omega.

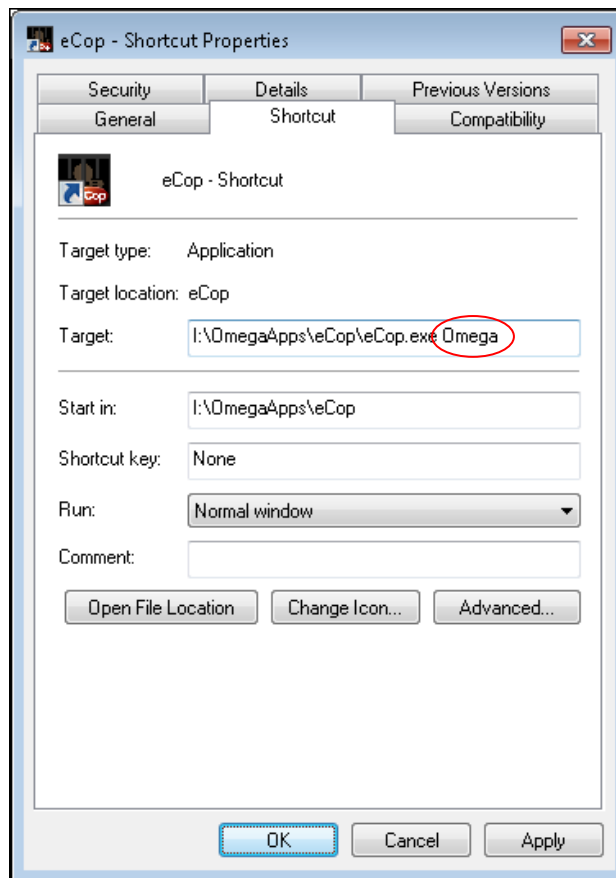
1. Right-click on the ancillary product's executable file, and then select **Create Shortcut** from the context menu. A shortcut file is created.



2. Drag the shortcut file to your desktop.



3. Right-click on the shortcut on your desktop that you just created, and select **Properties** from the context menu.
4. On the **Shortcut** tab, add the namespace *Omega*, or the namespace that you are using, to the end of the **Target** line.

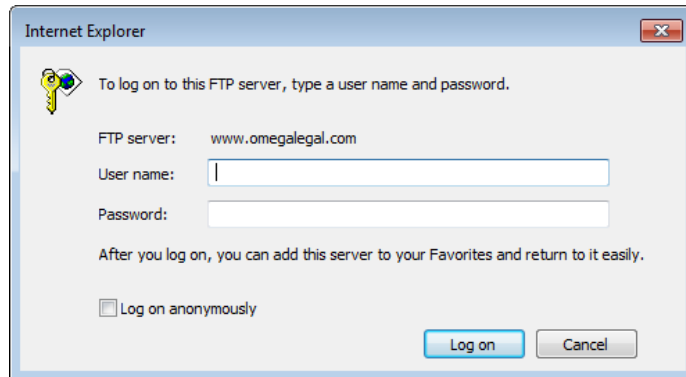


5. Click **OK** to exit the **Properties** dialog box.

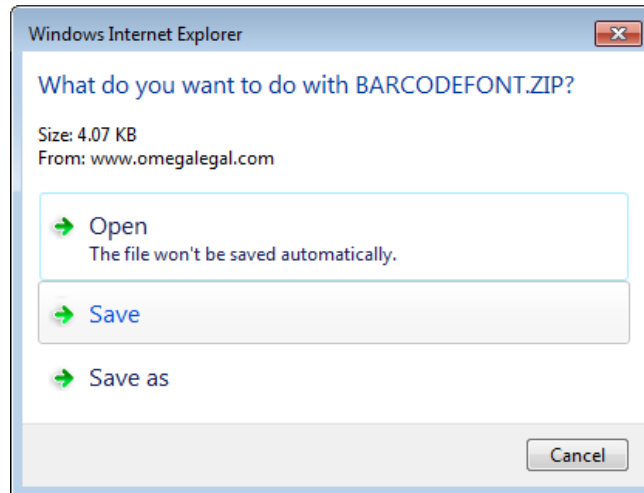
Install the Barcode Font for Imaging

If you are installing Imaging, you must install the barcode font w39m.TTF. This font needs to be downloaded from Omega's server and installed on any workstation that will be used to print barcode labels.

1. Log on to the server at <ftp://www.omegalegal.com/BARCODEFONT.ZIP>.
2. Enter *imaging* as the **User Name** and *omega* as the **Password**, and then click **Log on**.



3. Click **Save** to download the font.



4. Unzip BARCODEFONT.ZIP to a folder such as:
C:\User\Downloads\BARCODEFONT\w39m.TTF
5. Depending on your operating system, do one of the following:

Right-click on the extracted **w39m.TTF** font file and select **Install** from the shortcut menu.

or

Open the Windows Control Panel, and then **Fonts**. Go to the **File** menu and select **Install New Font**. Browse for the location where you unzipped the file, select the font, and then click **OK**.

Omega Legal 6.x Installation on Citrix / Terminal Server

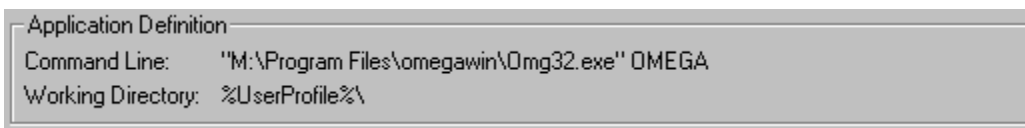
NOTE: When installing Omega Legal 6.x on a Citrix or Terminal server, you must decide if all users will run VX Standard or VX Pro. Both versions cannot be installed on the Citrix or Terminal server.

Complete the following steps to install Omega Legal 6.x on the Citrix / Terminal Server:

1. From the local console of the Citrix / Terminal server, go to a command prompt and type **CHANGE USER /INSTALL** to change to installation mode.

NOTE: Make sure that no users are currently connected to a Citrix / Terminal server session while performing the installation.

2. Run the **SETUP** for the Omega Legal 6.x Client installation on page 3 of this guide.
3. Once the installation is complete, change the Start In/ Working Directory setting in the Shortcut used to launch the Omega Legal 6.x application to **%UserProfile%** to avoid Sharing Violation errors. Refer to the *Sharing Violation Errors* section below for additional details on Sharing Violation errors.



4. Finally, go back to a command prompt and execute the **CHANGE USER /EXECUTE** command to switch out of Install mode on the Citrix / Terminal Server.

Sharing Violation Errors

The Omega Legal application uses the working directory defined in the **Start In** field on the **Properties** dialog box of the shortcut used to launch Omega Legal. This directory is used for Omega Legal's lock files and temporary caching files. By default, this directory location is set to the installation directory, typically **C:\Program Files\Omegawin**. On a stand-alone installation, this does not cause an issue since each workstation has its own copy of the program and, therefore, a unique **C:\Program Files\Omegawin** directory. However, on a Citrix / Terminal Server-based installation, all users are sharing the same installation of our application and, therefore, point to the same instance of the **C:\Program Files\Omegawin** directory.

If more than one user attempts to run the Omega Legal application in a Citrix /Terminal Server session, they will receive a "Sharing Violation" error. To resolve these file locking / sharing issues, the directory defined in the **Start In** field on the shortcut used to launch Omega Legal must be changed to a location that is unique to each user. We recommend setting the **Start in** field to **%UserProfile%**. This will substitute the individual profile directory setting for each user.

NOTE: You will want to make sure that all shortcuts used by your Citrix/TS users are modified accordingly. It is recommended that you create a single shortcut on the Desktop of the **ALL USERS** profile with the modified **Start In** setting so you will only have to create one shortcut. Also, if you are using Published Application to launch Omega via Citrix/TS, you will need to change the “Working Directory” to **%UserProfile%** to avoid the sharing violations as well.

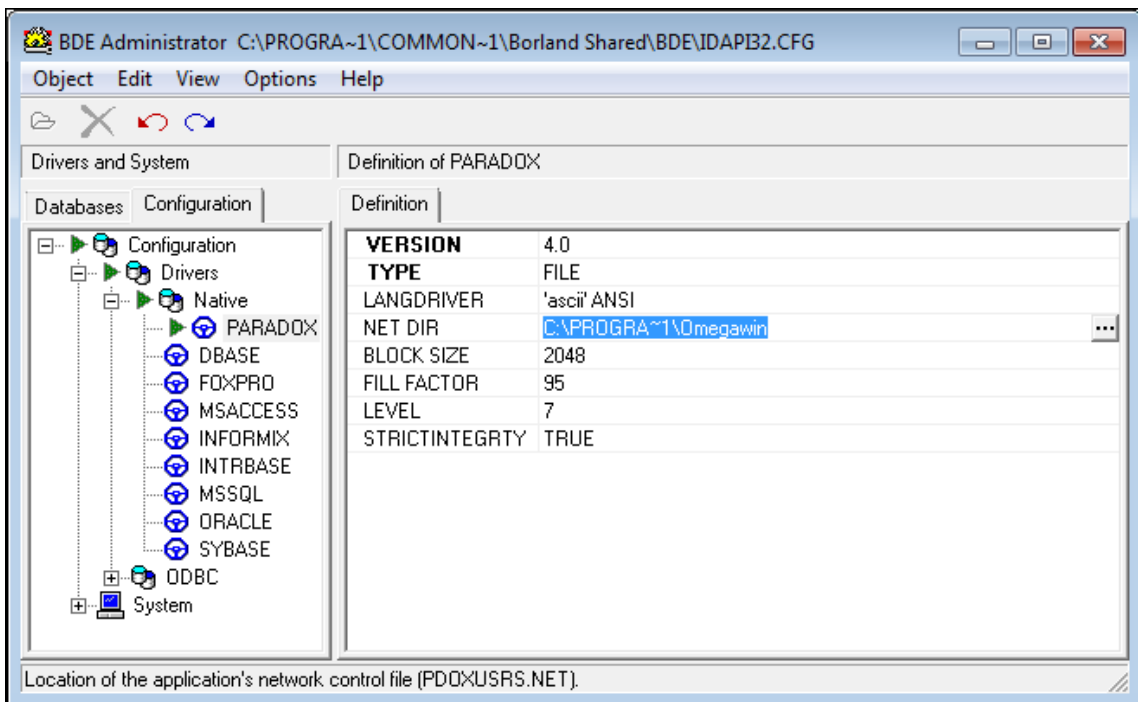
PDOXUSRS.NET Error / UE

The error the user is getting is a Permission Denied error, which is indicative of a rights issue on the local workstations. (Unknown table type. Permission denied. File: C:\PDOXUSRS.NET Directory: C:\.)

Our application also uses the Borland Database Engine (BDE). By default, the BDE engine is configured to use C:\ for the PDOXUSRS.NET control file. Based on the error, the user does not have rights to create/modify this file in this location.

To resolve the issue, you can change the location used for the .NET file:

1. Open the BDE Administrator in the Control Panel, or open C:\Program Files\Common Files\Borland Shared\BDE\BDEADMIN.EXE.
2. Select the **Configuration** tab.
3. Under the Drivers/Native/Paradox entry, modify the **NET DIR** line.



4. Set the new location to C:\Program Files\Omegawin. The users will have full rights to this directory.
5. Click into any other field on the right to accept the change.
6. Exit the BDE Administrator. Click **Yes** at the prompt save your edits.