PracticeMaster® Briefcase

www.PracticeMaster.com

Product Guide

PracticeMaster Briefcase Manual
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About PracticeMaster Briefcase

PracticeMaster Briefcase Overview

PracticeMaster Briefcase can be used to work with PracticeMaster data on a separate computer without the use of a network or modem. Briefcase lets users access all information in the database as well as perform day-to-day activities while away from the office. Multiple users can check data in and out. Data can be synchronized whenever and as often as you like. PracticeMaster Briefcase has the following features:

- Check out client, contact and calendar information on your laptop, basically taking your office with you. All records associated with the client are checked out including Area of Practice information, contact records, calendar records, fees, costs, document management records and journal records (i.e., phone, timer, e-mail, client notes, research).
- Briefcase data can be checked out as a completely interactive system or as “read only” (i.e., view-only for reference purposes).
- Check out one, several, or all clients, check out just your calendar entries, the firm’s calendar, or everything. It’s up to you!
- Synchronize any changes, additions, or deletions you make to your checked out Briefcase data with the main system.
- Minor restrictions are placed on the Briefcase user such as File Maintenance, renumbering and other utilities. You cannot modify reports, assemble documents, or work with calendar plan templates. A detailed list of restrictions can be found on page 5.

Note: PracticeMaster Briefcase requires PracticeMaster Premier. PracticeMaster Briefcase cannot be used with PracticeMaster Basic.

Terminology

When working with PracticeMaster Briefcase, the following terms will be used:

Host — Host refers to the system where the main PracticeMaster program and data files reside.

Remote (or Briefcase) — Remote (or Briefcase) refers to the set of data files used by PracticeMaster Briefcase.

Briefcase Programs

Programs related to Briefcase in PracticeMaster and PracticeMaster Briefcase consist of the following:

Check Out Briefcase — The Check Out Briefcase program is used by the host PracticeMaster system. This program is used to check out PracticeMaster data for use with a remote Briefcase system.

Check In Briefcase The Check In Briefcase program is used by the host PracticeMaster system. This program is used to check in PracticeMaster data that has been updated by Briefcase.

Compress Briefcase Data for Host The Compress Briefcase Data for Host program is used by the remote Briefcase system. This program is used to compress Briefcase data into a single file for quick and easy transfer to the host system.

How PracticeMaster Briefcase Works

Regardless of how many Briefcase users you have, the concepts for using PracticeMaster Briefcase remain the same.

Check Out Data from the Host System Before PracticeMaster Briefcase can be started, the PracticeMaster data must be checked out from the host PracticeMaster system using the Check Out Briefcase program. When data is checked out from the host, a Briefcase Path must be specified. The Check Out Briefcase program copies the selected data to the path specified. When the data is being checked out, it can optionally be compressed into a single file named CMHOST.ARQ.

Optionally Transfer Data to Briefcase System The host system may or may not have access to the Briefcase system. If the Briefcase Path specified is not the directory where the Briefcase program resides, a compressed CMHOST.ARQ file will automatically be created and it must be transferred to the Briefcase system's program directory.

Start Briefcase Once the data is in the Briefcase program directory, Briefcase can be started. If a CMHOST.ARQ file is found (and no other PracticeMaster data is present in the directory), Briefcase will automatically extract the data.

Use Briefcase Use Briefcase to view and modify data as desired. Briefcase works just like PracticeMaster with minor restrictions *(page 5)*.

Optionally Compress Briefcase Data This Briefcase program can be used to compress the Briefcase data into a single file named CMBRIEF.ARQ.

Optionally Transfer Briefcase Data to Host If the host system does not have access to the Briefcase data, the CMBRIEF.ARQ file must be transferred to the host system's program directory.

Check In Data on the Host System The Briefcase data is checked into the host system using the host system's Check In Briefcase program.

Computer Requirements

To use PracticeMaster Briefcase, the following system hardware is required:

- ❑ Windows 7/Vista/XP.
- ❑ 72 MB of free hard disk space.
- ❑ 800 x 600 or higher screen resolution using 96 DPI. Recommended 1024 x 768 or higher.
- ❑ 32-bit color is recommended.
- ❑ A CD drive for installing the programs onto the hard disk.
- ❑ High speed wired network recommended for multi-user versions. Wireless networks are not recommended due to performance and reliability issues.
- ❑ Training videos require Adobe® Flash® Player 10 or later for Internet Explorer.

Installing PracticeMaster Briefcase

PracticeMaster must be installed before PracticeMaster Briefcase can be installed.

PracticeMaster Briefcase must be installed on each computer where Briefcase will be used.

The PracticeMaster Briefcase software and complete installation instructions are provided on the CD.

Note: PracticeMaster Briefcase does not require System Configuration.

Starting PracticeMaster Briefcase

PracticeMaster Briefcase cannot be started unless data has been checked out from the host and has been transferred to the Briefcase program directory.

The software can be started via a shortcut icon on the Windows desktop or via the Windows taskbar.

Desktop Shortcut During installation, if you elected to create icons on the desktop, you can double-click the PracticeMaster Briefcase desktop icon.

Windows Taskbar PracticeMaster Briefcase can be started via the Windows taskbar. Click the **Start** button, and then point to **Programs**. Point to the **Tabs3 & PracticeMaster** folder and then click **PracticeMaster Briefcase**.

The title bar of the Briefcase window includes Briefcase as the product name.

Startup Options

All of the startup options available in PracticeMaster are also available in PracticeMaster Briefcase. Details can be found in the PracticeMaster manual or help.

Note: When using a startup option for PracticeMaster Briefcase, use the CMBRIEF.EXE file instead of the CM.EXE file.

Logon Dialog Box

The Logon dialog box is used the same way as with the host system. Users and passwords are defined using the User Configuration program in System Configuration in the host program directory.

Access Rights

User Access Rights for Briefcase work the same way as the user Access Rights in the host system. Access Profiles are defined using System Configuration in the host program directory.

Backing Up

As with the host system, backup copies of your data should be made and stored in a safe location. A list of the data files can be found in Chapter 1 of the PracticeMaster manual.

In addition to your regularly scheduled backups, there are a few programs in Briefcase that caution you to back up your data files. A temporary backup should be made prior to running one of these programs in the event the program is aborted abnormally (i.e., power failure, network problems, General Protection Faults, etc.). Do not ignore these warnings. These programs are:

- ❑ File Maintenance
- ❑ Reindex Files

Caution: Run the Data File Integrity Check program before backing up. This will ensure that the data being backed up is valid data.

Back Up Data Files

Menu Selections ***File* | *Back Up Data Files***

Purpose To make a temporary backup of the Briefcase data files before running a program where you are cautioned to make a temporary backup.

Caution: This backup procedure is a temporary backup and is not intended to replace your regular backup procedures. Keep in mind that every time this program is run, the previous backup is overwritten.

Note: The Briefcase backup data file is named STBACK.ARQ.

For your reference, the date and time of the last backup file, the User ID used to create the backup file, the type of backup, and the description entered for the prior backup are displayed in the window. You can enter a new description or accept the default description. For complete information regarding this program, refer to "Back Up Data Files" in Help.

Restore Data Files

Menu Selections ***File* | *Restore Data Files***

Purpose To restore one of the three prior backups made using Briefcase's Back Up Data Files program.

Caution: Restoring data files will overwrite your current data files.

You can select the backup you want to restore. Then, for your reference, the date and time of the last backup file, the User ID used to create the backup file, the type of transaction, the type of backup, and the description that was entered for the selected backup will be displayed in the window. For complete information regarding this program, refer to "Restore Data Files" in Help.

Files Used by Briefcase

The following includes a list of the file names used in Briefcase:

STBACK.ARQ	The name of the backup file created by the Briefcase Back Up Data Files program *(page 4)*.
CMBRIEF.LOG	A log file located in the host program directory that shows all check ins and check outs from the host system *(page 7)*.
CMHOST.ARQ	A compressed data file that is created by the host system when the Check Out Briefcase program is run with the **Compress Briefcase data for remote site** check box selected *(page 9)*.
CMBRIEF.ARQ	A compressed data file that is created by the Briefcase system when the optional Compress Briefcase Data for Host program is run *(page 15)*.
CMBCERR.LOG	A log file located in the host program directory that shows errors that were generated the last time the Check In Briefcase program was run *(page 13)*.

Restrictions

PracticeMaster Briefcase allows you to work as you would using PracticeMaster. However, there are certain restrictions placed on Briefcase functions as well as restrictions placed on host functions when Briefcase data is checked out.

GLS Note: Cost records added in PracticeMaster and PracticeMaster Briefcase do not integrate with GLS. In order for costs to integrate with GLS, they must be entered via APS or Tabs3.

PracticeMaster Briefcase Limitations

The following functions cannot be performed in the Briefcase system.

- ❑ eNote is not available in PracticeMaster Briefcase.
- ❑ Editing of client information has the following limitations:
  - ❑ You cannot change the Area of Practice assigned to a client.
  - ❑ You cannot edit the **Secure Client** status or **Inactive** status in the Client File.
  - ❑ You cannot delete a client in Briefcase.
- ❑ File Maintenance has the following restrictions:
  - ❑ You cannot add, edit or delete Areas of Practice.
  - ❑ You cannot add, edit or delete Area of Practice file information.
  - ❑ You cannot add, edit or delete System Files.
  - ❑ Only the **Main** and **Utility** tabs are available in the File Definition window. On the **Utility** tab, the **Import Data**, **Export Data**, **Print File Definition**, and **Reindex File** programs are available. However, the **Delete File** and **Erase File Data** programs are not available.
  - ❑ You cannot import eNotes.
- ❑ You cannot access the Customization program.
- ❑ You cannot access the Renumber Utilities or the Change Key Type program.
- ❑ You cannot modify Report Writer files.
- ❑ You cannot access the HotDocs or Word Document Assembly programs.
- ❑ Document management records are included in Briefcase, but the linked document files are not included when checking out Briefcase data. Any document files needed should be copied along with the Briefcase data.
- ❑ Outlook calendar/contact integration does not occur when running Briefcase. However, if automatic synchronization with Outlook is enabled, any changes made to your calendar/contact information will be transferred when the Briefcase data is checked in. Note that only the user performing the Check In Briefcase process will have their calendar and contact information synchronized unless Microsoft Exchange integration is enabled. If Exchange Integration is enabled and configured when the Briefcase data is checked in, the calendar entries for all users will be passed to their Outlook Calendars, regardless of which user is logged in.

Additionally, the records for any user that has periodic synchronization enabled will be synchronized to Outlook when the next periodic synchronization occurs.

- ❑ Worldox integration does not occur when running Briefcase. However, if you are integrated with this system, any changes made to client information will be transferred to Worldox when the Briefcase data is checked in.
- ❑ The Holidays By Venue program is browse only.
- ❑ You cannot access the Calendar Plan Templates program.
- ❑ You cannot generate Calendar Plans.
- ❑ Editing of CompuLaw calendar records on a Briefcase computer will not properly update associated CompuLaw calendar records unless CompuLaw is installed on the Briefcase computer.
- ❑ Import definitions created by the Import Data Wizard can be used while in Briefcase, but any changes or additions to the Import Definition list will be lost when running the Check In Briefcase program in PracticeMaster.
- ❑ You cannot edit the Billing Lookup records if the host system is integrating with Tabs3.
- ❑ You cannot access the Check Out Briefcase and Check In Briefcase programs.
- ❑ You cannot access the "Synchronize PM and Tabs3 / TAS" program.
- ❑ You cannot add new WorkFlows.
- ❑ PracticeMaster Briefcase requires PracticeMaster Premier. PracticeMaster Briefcase cannot be used with PracticeMaster Basic.

PracticeMaster Briefcase and Conflict of Interest Searching

When data is checked out for a Briefcase system, the Conflict of Interest Configuration files are not checked out. However, you can create new Conflict of Interest Configuration files in Briefcase. When a Conflict of Interest is performed in Briefcase, the fields that were configured in the host system will be searched. Briefcase users cannot mark fields in File Maintenance to be included in the Conflict of Interest Search.

When the Briefcase data is checked in to the host, any changes made to fields are automatically added to the conflict of interest configuration files in the host system *(provided the field that was changed is configured for conflict of interest searching)*.

Note: When performing a Conflict of Interest Search or a Contact Search in Briefcase, the search will only include information that was checked out to the Briefcase system. For example, if you only checked out Client 100.01, the search will only check for conflicts in records associated with client 100.01.

PracticeMaster Briefcase and History Tracking

If History Tracking is enabled in the host system, History Tracking is enabled in Briefcase. When Briefcase data is checked into the host, any changes made to the fields configured for History Tracking will be added to the historical log of changes in the host system. The User ID who checks the data in will be shown as the user responsible for the change. Furthermore, the date and time of the check in will be used to indicate when the change was made (as opposed to the date and time the field was actually changed in Briefcase).

Host Limitations

The following functions in the host system cannot be accessed **when data is checked out with a read/write status** for the Briefcase system unless the Briefcase status is cleared using the Briefcase Status List window. However, clearing the Briefcase status prevents the Briefcase data from being checked in.

- ❑ File Maintenance has the following restrictions:
  - ❑ You cannot add, delete, import, or export Areas of Practice. However, you can edit the Area of Practice information (i.e., Description and Document Path).
  - ❑ You cannot add or delete files. However, you can edit the File Title.
  - ❑ Only the **Main** and **Utility** tabs are available in the File Definition window. On the **Utility** tab, the **Import Data**, **Export Data**, **Print File Definition**, and **Reindex File** programs are available. However, the **Delete File** and **Erase File Data** programs are not available.

- You cannot access the Renumber Utilities or the Change Key Type programs in PracticeMaster, Tabs3 or TAS.
- The Restore Data Files program in PracticeMaster will restore the status for all Briefcase systems that were checked out when the backup was made. You will be asked to confirm that this is what you want to do. If you restore PracticeMaster data, any Briefcase data that has been checked out since the backup was made cannot be checked in. Furthermore, any Briefcase data that was checked in after the backup was made will need to be cleared from the status list after you restore.

The CMBRIEF.LOG File

Information regarding all Briefcase check ins, check outs and clearing of check outs is written to a log file named CMBRIEF.LOG. This file includes the function performed, the date and time the function was performed, which user performed the function, and the directory for the data. When Briefcase data is checked in, this log file also indicates whether the **Process Deletions** check box was selected. The CMBRIEF.LOG file is stored in the host PracticeMaster program directory. This file is accessible via any text editor such as Microsoft Notepad or WordPad. The maximum size of this file is 300 lines. Once the file reaches this limit, any data written to the file will begin replacing the oldest data to make room for the new data.

The following is an example of a CMBRIEF.LOG file:

```
Check Out (Normal)    Date: 11-11-2011  Time: 14:23:41  User "ROBERT" checked out into directory "c:\tabs3\briefcase\robert\".

Check In              Date: 11-14-2011  Time: 09:18:04  User "ROBERT" checked in  from directory "c:\tabs3\briefcase\robert\".  Process deletions: TRUE

Check Out (Normal)    Date: 11-16-2011  Time: 11:40:21  User "ROBERT" checked out into directory "c:\tabs3\briefcase\robert\".

Check In              Date: 11-17-2011  Time: 15:13:52  User "ROBERT" checked in  from directory "c:\tabs3\briefcase\robert\".  Process deletions: TRUE

Check Out (Normal)    Date: 11-21-2011  Time: 15:14:17  User "JULIE" checked out into directory "c:\tabs3\briefcase\julie\".

Check In              Date: 11-23-2011  Time: 14:18:52  User "ROBERT" checked in for user "JULIE" from directory "c:\tabs3\briefcase\julie\".  Process deletions: FALSE

Check Out (Read Only) Date: 11-24-2011  Time: 15:58:34  User "JAMES" checked out into directory "f:\tabs3\briefcase\james\".

Clear User            Date: 11-24-2011  Time: 09:55:44  User "ROBERT" cleared user "JAMES"

Check Out (Normal)    Date: 11-29-2011  Time: 14:05:06  User "ROBERT" checked out into directory "f:\tabs3\briefcase\robert".

Clear ALL             Date: 11-30-2011  Time: 15:55:44  User "ROBERT" cleared all users
```

Fig. 1, Example of a CMBRIEF.LOG File

Check Out Briefcase

Check Out Briefcase

System *PracticeMaster*

Menu Selections ***Maintenance | Integration | Check Out Briefcase***

Task Folders ***Integration | Check Out Briefcase***

Help ***Check Out Briefcase***

Purpose The Check Out Briefcase program is located in the host PracticeMaster system. This program can be used to check out PracticeMaster data for use with

PracticeMaster Briefcase. All records associated with the client are checked out including Area of Practice information, contact records, calendar records, fees, costs, document management records, and journal records (i.e., phone, timer, e-mail, client notes, research). Additionally, you can check out all calendar records for the entire firm or just specific calendar records. While the data is checked out, both the Briefcase data and host data can be modified. The Check In Briefcase program is used later to synchronize the data with the host system.

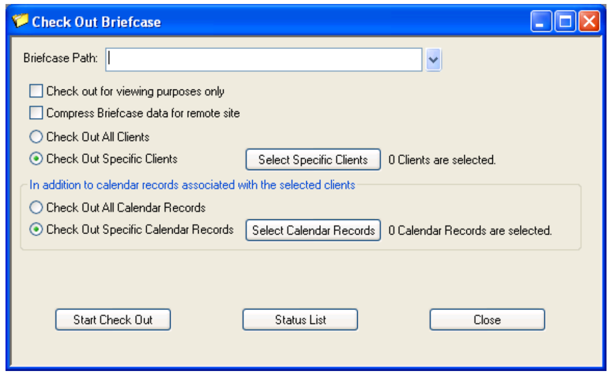

Fig. 2, Check Out Briefcase Window

When checking out the data, you can specify several options. The following information is included in the Check Out Briefcase window:

Note: When checking out Briefcase data, make sure you are logged into PracticeMaster as the user for which you are checking out data. Doing so will ensure that secure client and private calendar information is not excluded from the specified data.

Briefcase Path

Enter the disk drive letter and/or path where the Briefcase file(s) are to be created. If the file(s) are to be created for a computer that is not networked, you can create the file(s) on the hard disk of the host PracticeMaster computer or removable media such as a flash drive, and then transfer the file(s) to the other computer.

The path name must end with a ':' or a '\'. The colon follows a drive letter and the '\' follows a directory name. If a path is specified that does not exist, you will be asked if you want to create the path.

Platinum Note: PracticeMaster Platinum users must use an *intermediate folder* within the current working directory on the server. After Briefcase data is checked out to a subfolder of the current working directory, it can be moved to any desired location for use. Do not use a universal naming convention or mapped drive when specifying a Briefcase Path.

Do not use a colon (:) when specifying a Briefcase Path. For example, if your current working directory is C:\STI, entering User1\ would check out the Briefcase data to a folder named User1 under the current working directory. If the User1\ folder does not exist, it will be created for you.

Removable Media Note: If you will be transferring the data to removable media, we recommend checking out the data using the compress option.

Check out for viewing purposes only

Selecting the **Check out for viewing purposes only** check box creates Briefcase data files in the path specified. The check out is not added to the Briefcase Status List and is considered as checking out the data with a "read only" status. Even though the data is checked out for viewing purposes only, the data can still be modified by the Briefcase user. However, any changes made to the Briefcase data cannot be checked back into the host system. There is no limit to the number of times data can be checked out for viewing purposes only.

Clearing the **Check out for viewing purposes only** check box creates the data files in the path specified. This type of check out is considered as checking out the data with a "read/write" status. The data can be modified by the Briefcase user. The check out is added to the Briefcase Status List allowing you to check in the changes.

Compress Briefcase data for remote site

When the host data files are checked out for Briefcase, the data files can be compressed into a single file. Transferring a single file to the Briefcase program directory is easier than transferring an entire directory structure with multiple files.

Selecting the **Compress Briefcase data for remote site** check box compresses the data into a file named CMHOST.ARQ. This option is typically used when the host computer does not have direct access to the Briefcase system. The data is compressed immediately after the data is checked out. Therefore, you need to have enough disk space available for the full data set plus the ARQ file.

Clearing the **Compress Briefcase data for remote site** check box copies the PracticeMaster data without compressing the information into a single file.

Note: If you will be transferring Briefcase data via removable media, we recommend checking out the data using the compress option.

Clients

When using the Check Out Briefcase program, you can check out all clients or specific clients. Regardless whether one client, five clients or all clients are checked out, all records associated with the specified clients are also checked out. This includes Area of Practice information, fees, costs, calendar records, document management records, and journal records (i.e., phone, timer, e-mail, research, and client notes).

Check Out All Clients — Select this option to check out all clients.

Check Out Specific Clients — Select this option to specify which clients you want to check out.

The **Select Specific Clients** button is available when the **Check Out Specific Clients** option is selected. Clicking the **Select Specific Clients** button opens a Client window allowing you to select which clients you want to check out.

Calendar Records

All calendar records associated with the clients selected will be checked out with the clients. You can also check out additional calendar records by specifying one of the following options:

Check Out All Calendar Records — Select this option to check out all calendar records for the firm. This includes calendar records that aren't associated with a client (i.e., a blank Client ID).

Check Out Specific Calendar Records — Select this option to check out specific calendar records.

The **Select Calendar Records** button is only available when the **Check Out Specific Calendar Records** option is selected. Clicking this button opens a Calendar window allowing you to select additional calendar records to be checked out.

Note: If no calendar records and clients have been selected to be checked out, only Lookup files and Miscellaneous Support Files will be included in the Briefcase data.

The **Start Check Out** button is used to start the Check Out Briefcase process. Progress meters and messages are displayed showing the status of the Briefcase Check Out process. During the Check Out process, the Reindex window will be displayed. If you selected to compress the Briefcase data, the Compressing Briefcase Data window will be displayed. Once the entire check out process is complete, a message will be displayed indicating the transfer is complete.

The **Status List** button opens a Briefcase Status List window.

Status List

The **Status List** button in the Check Out Briefcase program and Check In Briefcase program displays the Briefcase Status List window. The Briefcase Status List window includes a list of all users who have PracticeMaster data checked out with a “read/write” status. Users who have checked out data for viewing purposes only are not included in the Status List. The number of current check outs and the maximum number of check outs allowed by the licensed software is shown at the top of the window. The following is an example of the Briefcase Status List:

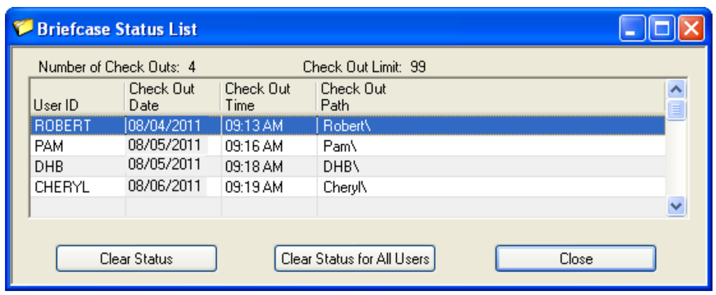

Fig. 3, Briefcase Status List Window

The **Clear Status** button displays a message allowing you to confirm that you want to clear the Briefcase status for the selected user. Clicking **Yes** will remove the check out record from the window thereby preventing the associated Briefcase data from being checked in. ***Once cleared, this status cannot be reversed.*** Clicking **No** cancels the task without clearing the status.

The **Clear Status for All Users** button displays a message allowing you to confirm that you want to clear the Briefcase status for all users with checked out data. Clicking **Yes** will remove all check out records from the window thereby preventing the associated Briefcase data from being checked in. ***Once cleared, this status cannot reversed.*** Clicking **No** cancels the task without clearing the status.

The **Close** button closes the Briefcase Status List window.

Note: Only managers can clear the status of other users. Once cleared, this status cannot be reversed.

Note: A record of who cleared whose status is maintained in the CMBRIEF.LOG file *(page 7)*.

Note: The Check Out Path may be truncated depending on its length. If so, the entire Check Out Path can be found in the CMBRIEF.LOG file *(page 7)*.

Check In Briefcase

Check In Briefcase

Program	***PracticeMaster***
Menu Selection	***Maintenance | Integration | Check In Briefcase***
Task Folders	***Integration | Check In Briefcase***
Help	***Check In Briefcase***
Purpose	The Check In Briefcase program is located in the host system. This program can be used to check in data that was updated by Briefcase.

Caution: It is important to back up your data prior to running this program. If this program is interrupted for any reason, it will be necessary to restore your data files and rerun this program. You will be given the opportunity to make a temporary backup immediately after selecting this program.

When the check in process is performed, PracticeMaster checks the contents of each field in both systems. There are four possible situations for each comparison: the data in the host system and the Briefcase system is the same and has not been changed; the data in the host system has changed; the data in the Briefcase system has changed; the data in ***both*** the host system *and* the Briefcase system has changed.

How the Check In Briefcase treats the synchronization of the data is shown in the following table:

Situation	Resolution
Host and Briefcase the same	No change
Only Host data changed	Always uses host data automatically
Only Briefcase data changed	Always uses Briefcase data automatically
Both Host and Briefcase data changed	Depends on the Conflict Option specified in the Check In Briefcase window **Prompt** - Interactive resolution field by field **Without Prompting** - Uses one of the following for all conflicts: Latest Change Host System Briefcase System

When checking in Briefcase data, you can specify several options. The following information is included in the Check In Briefcase window:

Note: When checking in Briefcase data, make sure you are logged into PracticeMaster as the user for which you are checking in data. Doing so will ensure that changes to secure client and private calendar information are not excluded. Furthermore, whichever User ID is logged into PracticeMaster determines which user's calendar record changes from Briefcase get posted to Outlook (provided Microsoft Exchange Server is not being used). If Microsoft Exchange Integration is set up in System Configuration when the Briefcase data is checked in, the calendar entries for all users will be passed to their Outlook Calendars regardless of which user is logged in.

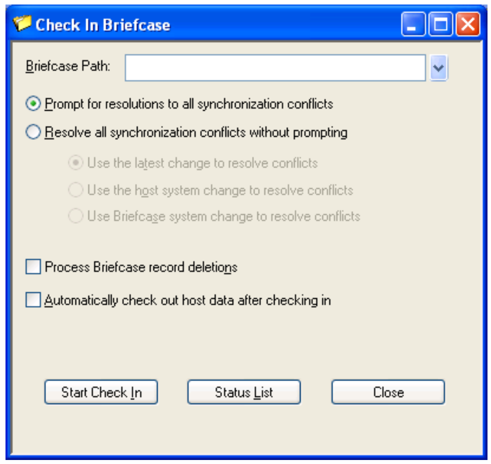

Fig. 4, Check In Briefcase Window

Briefcase Path

Enter the disk drive letter and/or path where the PracticeMaster Briefcase file(s) are located.

The path name must end with a ':' or a '\'. The colon follows a drive letter and the '\' follows a directory name.

Platinum Note: PracticeMaster Platinum users must use an *intermediate folder* within the current working directory on the server. When performing the Briefcase Check In, the Briefcase data must be located in a subfolder of the current working directory. Do not use a universal naming convention or mapped drive when specifying a Briefcase Path.

Do not use a colon (:) when specifying a Briefcase Path. For example, if your current working directory is C:\STI, entering User1\ would search the folder named User1\ under the current working directory for Briefcase data to check in.

Prompt for resolutions to all synchronization conflicts

Selecting this option will pause the synchronization process for each synchronization conflict allowing you to specify whether data from the host system or the Briefcase system should be used. Conflicts occur when the same data for the same field is changed in ***both*** the host and the Briefcase system. If conflicts are found and this option is selected, a Synchronization Exception Resolution window will be displayed allowing you to specify which system's data is to be used on a field by field basis *(page 14)*.

Resolve all synchronization conflicts without prompting

Selecting this option lets you specify which method you want used to resolve all synchronization conflicts. No operator interaction will be required. Conflicts occur when the same data for the same field is changed in ***both*** the host and the Briefcase system. Any conflicts found during the synchronization process will automatically be resolved based on the specified option with the following exception. If an identical key field was added to both systems, the Identical Lookup Key Conflict window will be displayed allowing you to specify which system will be used to resolve the conflict. The following options determine how conflicts are resolved.

Use the latest change to resolve conflicts

When selecting this option, any conflicts found will be resolved by using the most current information. This is determined by the date and time when the record was changed. The date and time is saved at the record level in both the host system and Briefcase system. When using this option, the Briefcase and host system's computer date and time should be approximately synchronized; otherwise unexpected results may occur. Time zones are ignored.

Use the host system change to resolve conflicts

When selecting this option, any conflicts found will be resolved by using the information stored in the host system's data files instead of the Briefcase files.

Use Briefcase system change to resolve conflicts

When selecting this option, any conflicts found will be resolved by using the information from the Briefcase files instead of the host system's data files.

Process Briefcase record deletions

Before running the Check In Briefcase program, you can specify if information deleted from Briefcase is to be deleted from PracticeMaster.

Selecting the **Process Briefcase record deletions** check box deletes any records that were deleted in Briefcase from the host system when the Check In Briefcase program is run.

Clearing the **Process Briefcase record deletions** check box does not delete any records from the host system that were deleted in Briefcase when the Check In Briefcase program is run.

Automatically check out host data after checking in

This option lets you synchronize the Briefcase data with the host data and check out the data again all in one step.

Select the **Automatically check out host data after checking in** check box to automatically check out the synchronized host data for Briefcase once the check in process is complete.

Clear the **Automatically check out host data after checking in** check box if you do not want to check out the data from the host once the check in process is complete.

The **Start Check In** button will start the Check In Briefcase process. A progress meter and several messages are displayed showing the status of the Briefcase check in process. During the check in process, the data files are deleted from the Briefcase data path. Once the check in process is complete, a message is displayed indicating the check in is complete. Clicking **OK** closes the Check In Briefcase window.

The **Status List** button opens a Briefcase Status List window *(page 10)*.

Note: If errors are encountered during the check in process, information will be written to a temporary log file named CMBCERR.LOG. A Print dialog box will be displayed giving you the opportunity to display, print or save the log file. This file includes the location of the Briefcase data and the location of the host data. For each error generated, the Area of Practice, File, Record Key, Field, Field Type, Error and Briefcase Field Value are shown.

Synchronization Conflicts

When the check in process is performed, PracticeMaster checks the contents of each field in both systems. Conflicts occur when the same data for the same field is changed in ***both*** the host and the Briefcase system. If a change is made in the Briefcase system only, PracticeMaster knows that this is the most recent change and automatically uses the Briefcase data without prompting the operator. Likewise, if a change is made in the host system only, PracticeMaster knows that this is the most recent change and automatically uses the host data without prompting the operator. However, if a change is made to the same field in ***both*** the host and the Briefcase system, this is considered a conflict and will generate information in the Synchronization Exception Resolution window.

Note: The date and time of the Briefcase computer should be approximately synchronized with the host computer. This can be an issue when data is checked back in using the "latest change" option to resolve conflicts. Every time a record is changed, the date and time is saved with the record. The date and time is saved in both the host system and Briefcase system. Time zones are ignored.

The following is an example of the Synchronization Exception Resolution window.

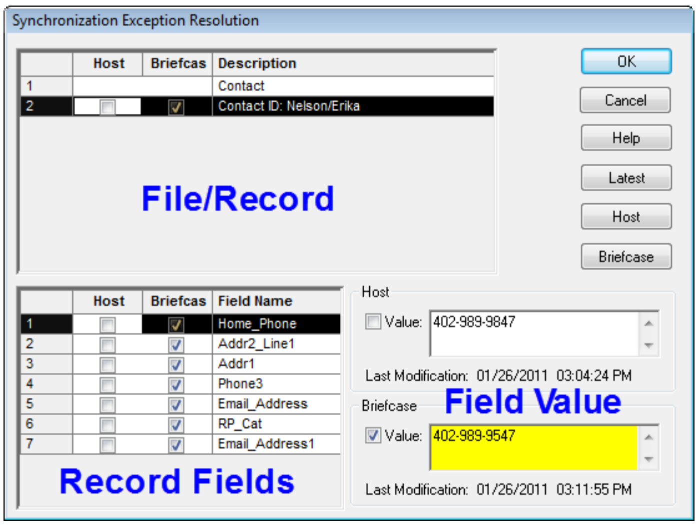

Fig. 5, Synchronization Exception Resolution
for a single field

The Synchronization Exception Resolution window is displayed when a conflict between a record in the PracticeMaster data (i.e., host system) and the Briefcase data occurs. This window allows you to specify whether PracticeMaster information or Briefcase information is to be used when resolving conflicts for the record.

In Fig. 5, the phone field in the Client file for Client ID 800.00 has two different phone numbers.

The Synchronization Exception Resolution window displays three basic areas: the File/Record area; the Record Fields area; and the Field Value area.

File/Record — The **File/Record** area displays the file name with the record that contains conflicting data.

Record Fields — When a record in the **File/Record** area is selected, the **Record Fields** area displays one or more fields within that record that contain conflicting data.

Field Value — When a field is selected in the **Record Fields** area, the **Field Value** area displays the Host value and the Briefcase value for the field.

The **OK** button can be used to synchronize the conflicting data files.

The **Cancel** button can be used to close the window and cancel the synchronization.

The **Latest** button can be used to select all check boxes with the most current information. This is determined by the date and time when the record was changed. The date and time is saved at the record level in both the host system and Briefcase system. When using this option, the Briefcase and host system's date and time should be approximately synchronized; otherwise unexpected results may occur.

The **Host** button can be used to select all check boxes located under the Host columns.

The **Briefcase** button can be used to select all check boxes located under the Briefcase columns.

Occasionally, a situation may arise when both the Briefcase system and the host system have added a new record with the same key field. In this situation, an Identical Lookup Key Conflict window will be displayed allowing you to combine the records or create two different records (see Figs. 6 and 7). If you select the option to create two different records, you will be asked to specify a new name for the Briefcase key.

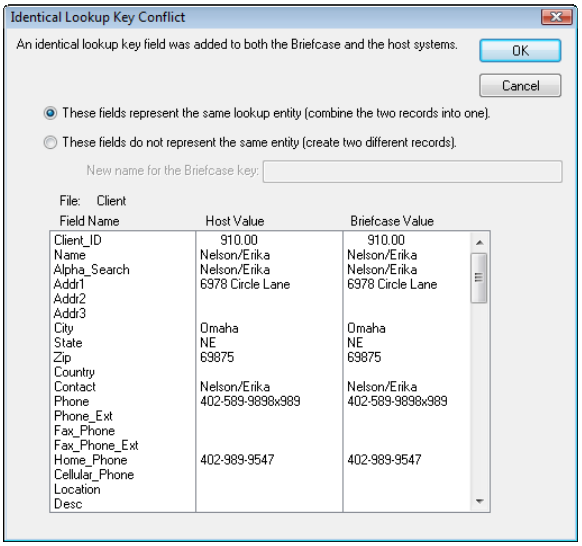

Fig. 6, Identical Lookup Key Conflict When You Want to Combine the Records

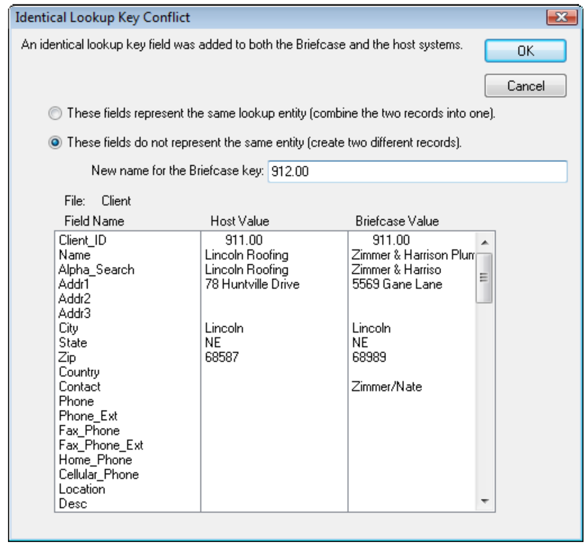

Fig. 7, Identical Lookup Key Conflict When You Want to Create Two Different Records

Compress Briefcase Data for Host

Compress Briefcase Data for Host

Program *PracticeMaster Briefcase*

Menu Selection *Maintenance | Integration | Compress Briefcase Data*

Help *Compress Briefcase Data for Host*

Purpose The Compress Briefcase Data for Host program can be used to compress the Briefcase data files into a single data file named CMBRIEF.ARQ. Compressing the data into a single file allows you to easily transfer the data by only having to transfer one data file.

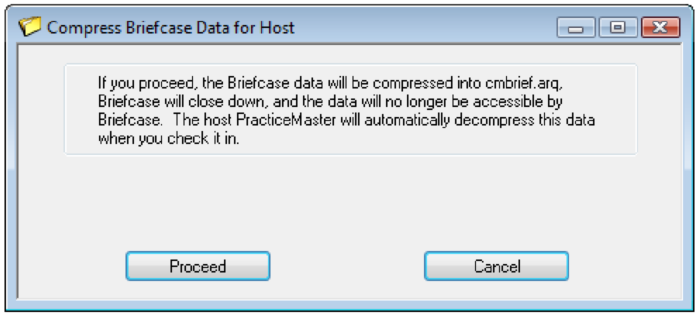

Fig. 8, Compress Briefcase Data for Host Window

The Compress Briefcase Data for Host program can only be accessed when using PracticeMaster Briefcase.

The **Proceed** button will begin the compression of the Briefcase data into a single file named CMBRIEF.ARQ. A Compress Briefcase Data window will be displayed with the progress of the compression. Once the data is compressed, the original data files will be deleted and Briefcase will be closed. The data can no longer be accessed by Briefcase until a new set of data files is obtained from the host PracticeMaster system.

Error Messages & Troubleshooting

Error Messages

Detailed information regarding Briefcase Error Messages and Troubleshooting can be found in our Knowledge Base at:

www.support.PracticeMaster.com

Search for KB Article R10587 or the keyword “Briefcase”.

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