Probate Plus v5 – release and installation notes

Thank you for choosing Probate Plus v5 for your probate practice. PPv5 can help you record information relating to a probate administration, automatically produce estate accounts and reports, help you write letters, fill forms and manage documents.

PPv5 can operate stand-alone or networked with your colleagues to share your caseload. It provides a way to centralise and standardise the presentation of your probate practice.

Installing PPv5 is a straightforward process. It can be installed alongside or over PPv3 or PPv4. There is no in-place upgrade from PPv2 but PPv2 data files can be upgraded and used by PPv5, contact support@LawSystems.co.uk for this service.

If you're upgrading, make sure you have a recent (and tested) backup of your existing PP data folder and the files within. PPv5 makes changes to your data files.

Installing Probate Plus v5.

Locate the file **setup.exe** and double click to start the installation process. When installing on Windows Vista (or higher) you may need to provide administrator credentials. Administrator rights are not required when running PPv5. The application installer (setup.exe) places the PPv5 application and database "engine" (ADS) onto your PC. PPv5 communicates with the ADS that in-turn handles all read/write access to your data folder.

Upgrading from previous versions.

If you already have PPv3 or PPv4 installed, PPv5 will prompt to import your existing settings the first time it is run. PPv5 will add new fields to your existing database files and will require exclusive access to the data folder in order to add these new fields (updates are carried out the first time PPv5 is started). This allows the new functionality present in PPv5 to work. If PPv3, PPv4 and PPv5 are operated at the same time PPv3 and PPv4 will not be aware of the extra features that PPv5 adds.

Database folder

The data folder is a location that you specify to tell PP where to store the central shared database that holds your postings and transactions. If you're upgrading or reinstalling, this location may already be set.
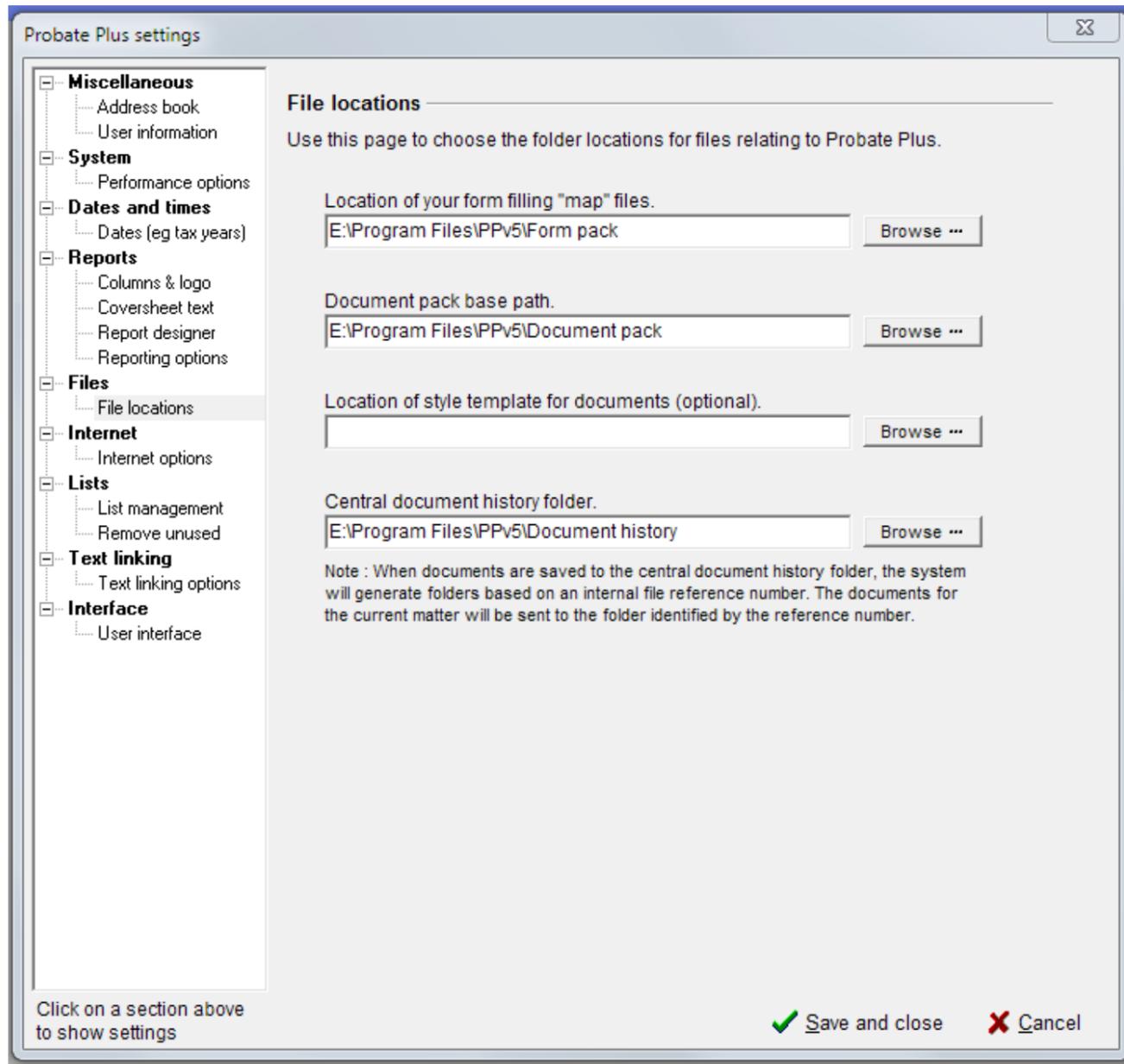

When setting the location of the data folder you can choose a location on your PC (such as My Documents\Probate Plus\Data) or if networked, on your network server. If the folder doesn't exist it will be created for you and populated with the necessary files PPv5 needs to get started.

You also need to choose a database server type. If you have purchased and installed the client-server database add on for PPv5 you'll need to choose the client-server option.

If you're installing PPv5 stand-alone or peer-to-peer with a few other PCs then the built in (free) peer-to-peer database engine will be used.

[Database setup dialog – FILE..Options..Configure database connection]

Other folders

You can also configure other folder locations once you've started PPv5. Your IT department will advise you of the preferred location of these folders.

[Probate Plus settings (Find it by clicking **FILE..Options..Configure system**)]

Location of your form filling "map" files – a local or network location containing your form support pack. Form-filling integration is supported as long as you have a fill-and-save edition of Adobe Acrobat such as Acrobat Std or Pro, Oyez or Laserform systems.

Document pack – a local or network location containing 180+ documents from the free PP document library. The documents are designed for use with Microsoft Word.

Document history- a local or network location that provides a way of managing documents, forms, spreadsheets or any files you wish to link to your PPv5 matters.

Evaluation mode, CloudLM account, HASP keys, PECS units…

Probate Plus is a pay-as-you-go product and this capability is provided through the use of an online storage account called "CloudLM" or via a (now deprecated) hardware "key" called a HASP key. Your CloudLM login credentials will be supplied to you as part of your order or when migrating from HASP key to a CloudLM account.

If using the hardware key, PPv5 uses the NetHASP from SafeNet Inc. (www.hasp.com), a single HASP can serve multiple PP workstations saving the need for a HASP for each workstation. To share your HASP over your network you'll use software called the HASP Licence Manager (HASPLM).

PPv5 is initially set to operate in "evaluation mode". This is normal behaviour and allows you to explore PPv5. The CloudLM store is the preferred way of storing your pay-as-you-go units and is designed to replace the HASP key. If upgrading, any units on your existing HASP key can be migrated to a CloudLM store.

Device drivers for HASP key: Windows should automatically download and install device drivers for your HASP key. You can manually download HASP drivers from www.hasp.com