

Transaction Recovery Systems, Inc.

Using TBDevice to import Client Matter codes into CopyAudit

Creating Validation Files

Validation files for the client (CLIENT.TXT), timekeeper (EMPL.TXT) and tcode (TCODE.TXT) files can be created. The client file will contain a record for each active client/matter that exists in the Tabs3 Client file. Use the following procedure to create the validation file:

1. If the TBDevice program is already started, skip to step 3. From the Software Technology folder, double-click the **Data Collection Device Conversion** icon to start the TBDevice program.
2. If the Logon dialog box is displayed, enter your User ID and Password and click **OK**.
3. From the **File** menu, select the **Validation** option.
4. The Validation window will be displayed. If the **Other** device is *not* displayed in the **Device** field, click the drop-down arrow next to the **Device** field to select the **Other** format.
5. Click the **Create** button.
6. Once the files are created, click **OK**.
7. Click **Cancel** to close the Validation window.
8. Transfer the files to the data collection device.

Note: Validation files should be recreated and transferred to the data collection device after changes have been made to the Client, Timekeeper, or Tcode files in Tabs3.

TBDevice|Validation|Other creates file "Client.txt".
Need to rename the Client.txt to Client.csv.

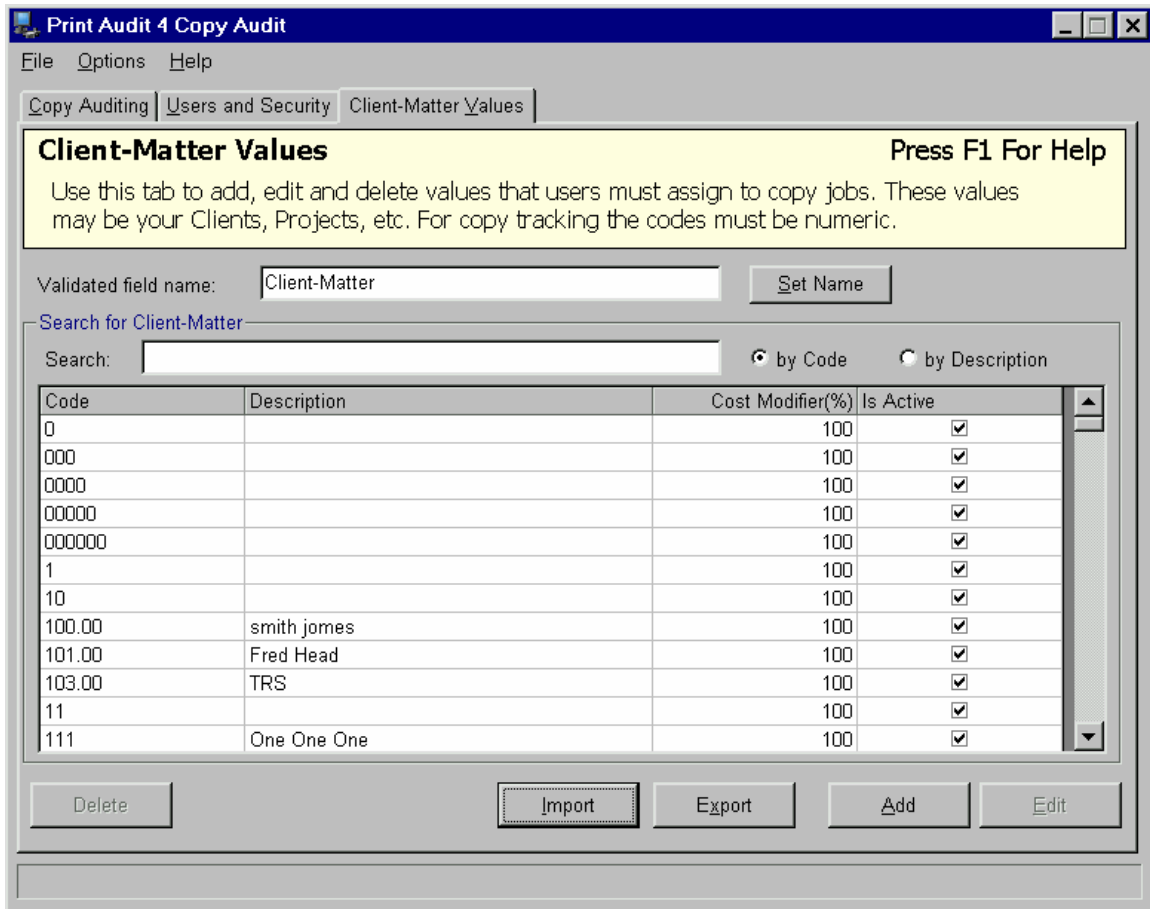
Can then import the file that looks like this:

```
100.00,smith jomes  
101.00,Fred Head  
103.00,TRS, Incorporated
```

Note: The Validation file will only contain active client-matter codes.

Go into the Copy Audit Program|Client-Matter Values tab and choose import.

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Sample Validation Files

Examples of the validation files created by the "Other" format are shown below.

CLIENT.TXT – Client File

100.00, "Phillip/Marcus", "Real Estate Acquisition"
101.00, "Williams/John", "State v. Williams"
102.00, "Federated Casualty, LTD.", "Andrew C. Gilbert v. Federated Casualty"
200.01, "Peterson Insurance Co.", "General Legal Counsel"

EMPL.TXT – Timekeeper File

1, "Michael L. Jensen"
2, "Jennifer A. Martin"
3, "Ronald P. Anderson"