






How to move Practice Manager/Self-Assessment to a new PC/Laptop

On the Old PC/Laptop

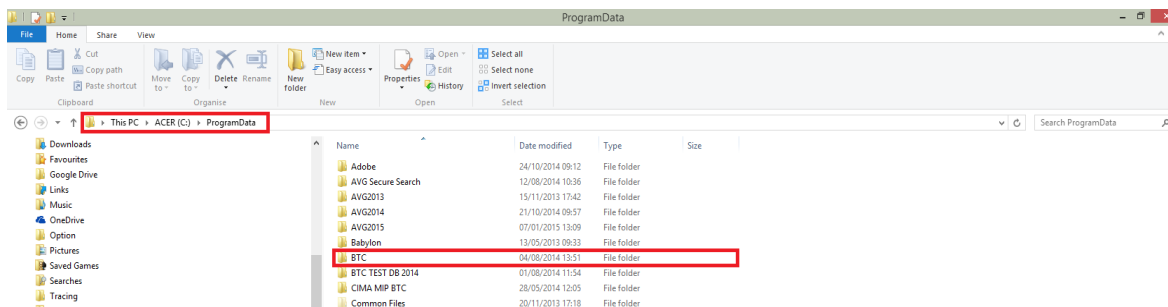
1. Open up the windows file explorer.

For windows 7 and Vista this can be done by right clicking on the start button  and then by selecting 'Open Windows Explorer'.

For windows 8 this can be done by right clicking on the windows icon  and then by selecting 'File Explorer' or by clicking on the file icon on the taskbar .

2. Browse to the BTC data folder by double clicking on the folders. The BTC folder is in the following location: C:\ProgramData\BTC or C:\ProgramData\BTCSoftware



You may need to click 'Computer' or 'This PC' first in order to get to the C drive.



NB ProgramData may be hidden so if you are not able to see this folder from the windows file explorer:

For windows 7 and Vista click on Tool Folder Options and the 'View' tab and then from the view tab check on the 'Show hidden files and folders' radio button. Then close this 'Folder Options' window.

For windows 8 click on the 'View' tab and then check on the 'Hidden items' tick box.

3. Right click the BTC or BTCSoftware folder and then click 'Copy' from the drop down menu.
4. Insert the USB stick into the PC and then right click and 'Paste' the folder onto the USB stick.
5. Close the windows file explorer and then remove the USB by clicking on the 'Show Hidden Icons' arrow at the bottom right of the screen  and then select the safely eject option  and 'Eject Mass Storage' for your USB drive and then remove the USB stick from the old PC.



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On the new PC/Laptop

1. Download the Practice Manager/Self-Assessment programs from the following location <https://admin.btcsoftware.co.uk/customer/download.ashx?ty=L&PCode=PMSolution> you will need to login to our website.
2. Run the installer by double clicking the BTCSolutionCentreInstaller.exe. (If you selected 'Save' instead of 'Run' this executable file will usually appear in your downloads folder).
3. Follow all of the defaults when running the installer. This will setup a blank version of the data area in the following folder C:\ProgramData\BTC
4. Close the Practice Manager/Self-Assessment program if it is open.
5. Open up the windows file explorer.
6. Browse to the C:\ProgramData folder using the windows file explorer (as detailed in step 2 above).
7. Delete the empty BTC folder that has been setup by the installer by right clicking on it and then selecting 'Delete' from the drop down menu.
8. Insert the USB stick into the new PC and then browse to the BTC or BTCSoftware folder copied from the OLD PC/Laptop.
9. Right click on the BTC or BTCSoftware folder and then select 'Copy'.
10. Browse back to C:\ProgramData and then right click and 'Paste' the BTC or BTCSoftware folder into the ProgramData folder.
11. If the folder that you pasted into ProgramData was entitled BTCSoftware then right click it and then rename it BTC.
12. Amend the permissions for this new BTC folder in the following way.
13. With the windows file explorer open right click the C:\ProgramData\BTC folder and then select 'Properties'.
14. From the 'Security' tab click the 'Edit' button and then press the 'Add' button.
15. Now type 'Everyone' into the 'Enter the object names to select' and then press the 'Check Names' button and then the 'OK' button.



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16. From the 'Permissions for BTC' window mouse click 'Everyone' in the 'Group or user names:' box and then check on 'Full control'. Now click the 'Apply' button and then click the 'OK' button.
17. Close all of the windows explorer windows and then login to Practice Manager/Self-Assessment by double clicking on the BTC Solution Centre desktop icon and confirm that your client data is visible.