Install Workgroup Edition

The YouWinLaw setup will normally create an YouWinLaw Folder in the Documents Folder. The YouWinLaw Folder contains a database folder, a template folder and a document (AutoDoc) folder.

AutoDoc is the document folder of YouWinLaw. All Microsoft Word documents, drag & drop of Outlook Email messages and/or attachments or other files (like dictating or pdf files) are saved here. They all have a corresponding entry with the full path in the YouWinLaw database.

Templates is the template folder of YouWinLaw. Here you find Word templates for the automatic creation and assembly of documents from the Document Automation. You will also find the Billing Word templates here.

Database The YouWinLaw database is stored here. The database is in a native Microsoft Access mdb format and is readable from Access or Excel. YouWinLaw connects to the YouWinLaw database via ODBC. You can see the actual path to the database with the YouWinLaw administrator (menu Tools / Administrator in YouWinLaw or direct from the Start menu in Windows). You can also start the Windows ODBC Administrator direct from here. With the ODBC Administrator you can browse or modify the path to the YouWinLaw database.

TIP: You can test the YouWinLaw Workgroup Edition on your network with the Free Trial. The only restriction: you must use the same login user on all computers (you cannot define more users in the free trial administrator).

TIP: You can also use one of the working computer as a "server computer".

TIP: You can also use a NAS (Network Attached Storage) like a Synology Diskstation as a "server computer".
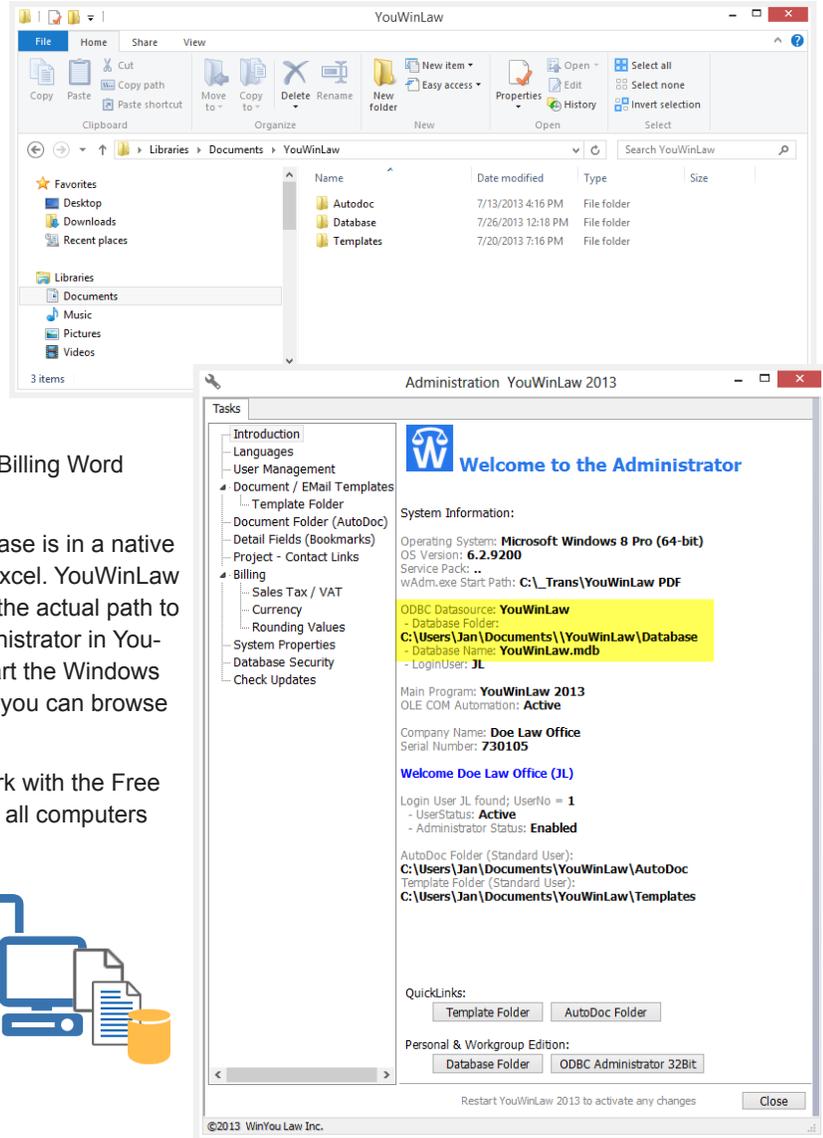
The Workgroup Edition should use a shared folder (YouWinLaw) across your network. This shared folder (including subfolder) should be accessible from each computer. The share name should be the same across your network. Normally the folder is installed on a server or a computer acting as a server. You are probably sharing your documents with the server already today.

TIP: If you feel uncomfortable with the described requirements or steps, contact your IT professional or somebody who can help with this. We are using windows industry standards for the setup.

Requirements:

- Each computer in the network should use the same share (\\Server\YouWinLaw Folder) including any work computer acting as a server.
  YouWinLaw saves the path of any created document in the database, therefore it is important that the share is the same for all computers, otherwise not all computers will be able to open the document.
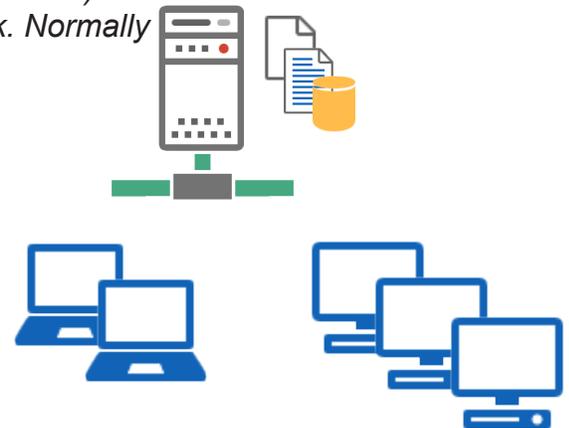
Create, Copy and Share Folders on the "server computer"

1. Create a new YouWinLaw folder on your "server computer"
   (e.g. c:\YouWinLaw)

2. Copy the AutoDoc folders and content from your computer to the YouWinLaw folder on the "server computer"

3. Copy the Templates folder and content from your computer to the YouWinLaw folder on the "server computer"

4. Copy the Database folder and content from your computer to the YouWinLaw folder on the "server computer"

5. Check: Now on the "server computer", the YouWinLaw folder should have three sub- folders with corresponding content (files):

6. Share this folder (YouWinLaw with sub-folders) to the users

Tasks on each "YouWinLaw" computer in the network

1. Install the YouWinLaw Free Trial on the computer. Start YouWinLaw once with the free trial database.

2. Map (connect) a network drive to the YouWinLaw folder (share) on the "server computer"

3. Modify the YouWinLaw Database ODBC Datasource to the shared database on the "server computer" (YouWinLaw\Database\youwinlaw.mdb).

   a. Start the ODBC Administrator (32-bit) from windows start menu / YouWin-Law (we have a direct link to the ODBC Administrator here).

   b. Select the User Data Source YouWinLaw and click on button [Configure]

   c. Click the button [select...] to modify the database path to the new mapped YouWinLaw shared database

   d. Save and exit the ODBC Administrator

4. Start YouWinLaw to test the modified ODBC Connection. YouWinLaw should start and show the content of the "server computer" database
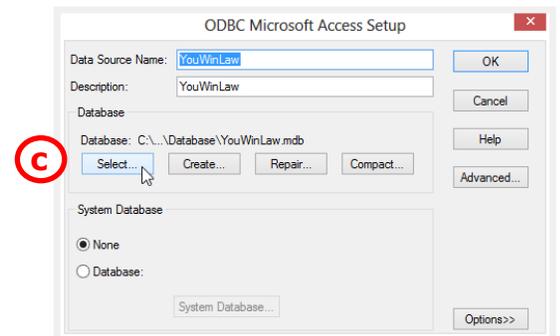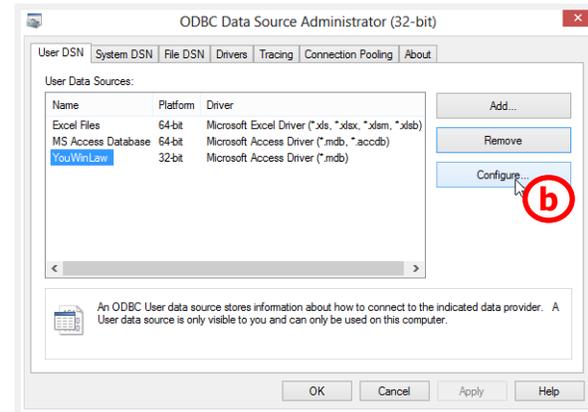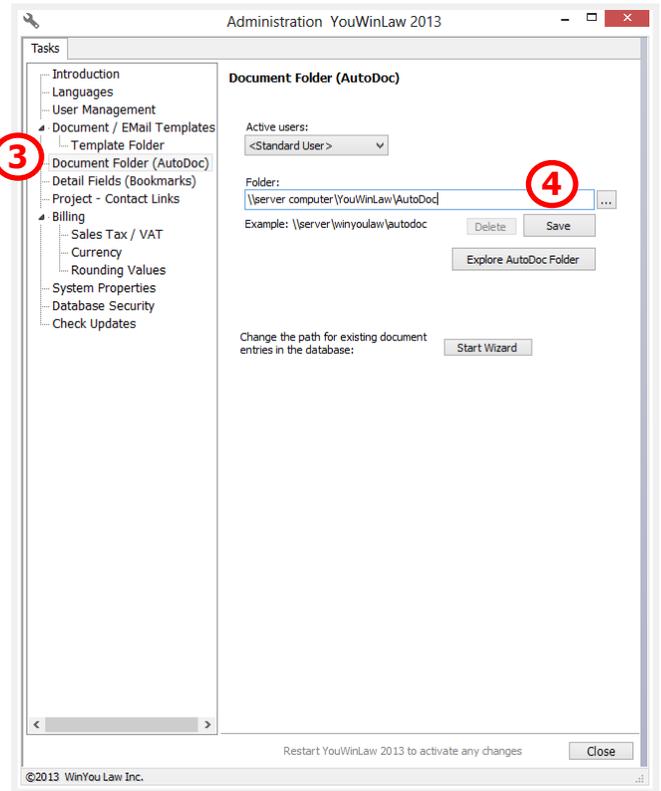
Modify the path to the YouWinLaw document AutoDoc folder

This is where the created (or copied) documents in YouWinLaw are saved

1. Start YouWinLaw on a computer which is connected to the "server computer" database

2. In menu Tools, click on Administrator

3. In the Administrator select "Document Folder (AutoDoc)"

4. Change the folder to new YouWinLaw share:
\\Server computer\YouWinLaw\AutoDoc

5. Click on button [Save] to save the new Document Folder

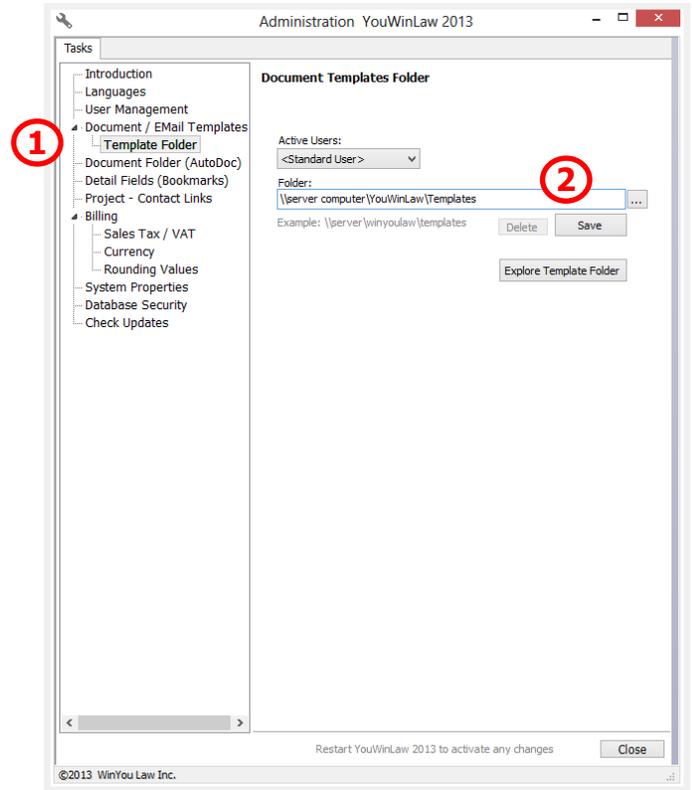**TIP:** Always use the <default user>, not any individual users.

Modify the path to the YouWinLaw template folder

This is where the Word templates is stored

1. In the Administrator select "Template Folder"

2. Change the folder to new YouWinLaw share:
\\Server computer\YouWinLaw\Templates

3. Click on button [Save] to save the new Template Folder

TIP: Always use the <default user>, not any individual users.

Test!

1. On the different "YouWinLaw" computers test creating a client. Refresh the Project Explorer on the other computer - the newly created client should show up.

2. On the different "YouWinLaw" computers test creating a document for a specific client. Refresh the Work Screen for this client on the other computer - the newly created document should show up.

TIP: If YouWinLaw is active on a computer you need to do a refresh to see newly created entries from the other computer.

Backup!

Include all of the "Server computer" YouWinLaw folders (including sub-folders) in your regularly backup!