Case Manager
Single Computer & Network
Installation Instructions

Your purchase of Case Manager gives you the right to install the software on A SINGLE COMPUTER OR MULTIPLE COMPUTERS (at a SINGLE BUSINESS LOCATION) and operate the software from any one of these computers, and also access database information entered into the software from any one of the computers. This is commonly called a network.

Installation on a single computer:

Installing Case Manager Software on a single computer is simple, and you should conduct the complete setup **before entering your first records** **(See Setup Manual),** since this will make record entry extremely easy.

You must be connected to the Internet when you install the software.

On the date of your installation, an NPPSN representative will send you an email, directing you to a web page where you will be able to download your Case Manager software and any updates, plus all User Manuals.

You will be downloading TWO software files. One is a FULL install file, and the other is a software UPDATE file that updates the full version to include the most current updates to the software.   You must first install the FULL VERSION, by double clicking on the Case Manager "executable file" (.exe) that you downloaded and the full version of the software will self-install.

During installation, you will be asked to select "Components".   The three choices are "Full", "Workstation", and "Server".   **Select "Full".**

A "Full Version" and "Demo Version" will install. Unless you specify a different directory during installation, the full functioning and demo program will install in the "program files" directory on your computer, in a sub-directory named "NPPS Case Manager". The default path is c:\Program Files\NPPS\NPPS Case Manager\.   You can specify a directory of your choosing for installation. This information will tell the Case Manager Program where to locate the NPPS Data.mdb database file so that you can perform read and write functions when entering records into the database.

When the installation has completed, two icons will automatically be placed on your Desktop. One is labeled "NPPS Case Manager" (the full functioning program), and the other is labeled "NPPS Case Manager Demo" (the demo version).

You must Register & "activate" the Full Version of the software after installation for it to function.

SOFTWARE REGISTRATION & ACTIVATION:
When you first load the FULL version of Case Manager, the below Registration Screen will appear, requiring that you enter a "Contact Name", "Company Name" and "Authorization Code", which will be emailed to you by your NPPSN representative.   You must enter this information and submit it. This MUST be done while you are connected to the Internet, as your Authorization Code is submitted to NPPSN' main online registration database where it is "confirmed" and automatically activates your Case Manager Software so that it can be used.   **You must be connected to the Internet when you install the software.**

The contact name is normally your First and Last Name. The Company Name is the name of your Company (if you have one) or another name that NPPSN assigns. The Authorization Code is a "unique activation code" that NPPSN assigns to your copy of the Case Manager Software.

Since your software has been provided to you on a monthly subscription basis, you must keep your payments current or the software will cease to function if payments are seriously in arrears. Periodically, the software will automatically search for a re-activation code in the NPPSN online registration database, where payment information is also located.

If you have provided NPPSN with credit card information and authorization to debit your card monthly to cover the recurring monthly software fees, then fees will always be kept current and re-activation of your software will automatically occur periodically.

NOTE: DEMO Version does not require any authorization to use.

Once you have successfully registered and activated the FULL VERSION, you must now double click on the UPDATE FILE that you downloaded, in order to update the software to the most current version.   During the install of the UPDATE you will see a prompt that cautions you about backing up your database, which you can ignore since this is your initial installation.

When the UPDATE installation has completed, you will be asked to re-boot your computer, which you should do.   Installation of the UPDATE places an extra CASE MANAGER icon on your desktop, which you can either leave there or delete, as the FULL VERSION install also placed an ICON on your desktop.

FILES & FOLDERS THAT ARE INSTALLED:
The below files will be installed at c:\Program Files\NPPS\NPPS Case Manager, unless you specify otherwise during installation:

NPPS Case Manager.mde - This is the main "full functioning" program file which is executed when you click on the Case Manager icon that is installed on your desktop when the program is installed.

NPPS Data.mdb - This is the database file where all records are saved when you enter them into the main program.   The reason that the database is a separate file is to allow for upgrading the main program when upgrades become available, without disturbing records that have been saved.

NPPS Database Manager.mde – This is an executable file used to "compact" (compress) the Case Manager Database file periodically.   You should do this at least once per week.

NPPS Case Manager Demo.mde - This is a demo copy of the Case Manager Software that enables you to test all areas of software use before using the full functioning program.   After you install Case Manager, we strongly suggest that you first load the Demo copy of the software and use it for a week or so to become familiar with all of the features (there are many). When you feel you are comfortable using the software, simply load the full functioning Case Manager Program and start entering your business records.   You can load the demo at any time for practice purposes, and it will not affect the full functioning Case Manager Software and database.

The DEMO software allows you to enter only 15 test records, which you can delete to allow you to enter more records.   All features found in the full functioning program are included in the DEMO version, which allows you to print affidavits, statements, invoices, reports and other documents, that all contain a SAMPLE watermark that cannot be removed.   You cannot create backups using the DEMO version and you cannot upload records to the Internet using the DEMO. The DEMO software does not have a separate records database. It is built into the demo.

To load the demo, simply click on the Case Manager Demo icon that was placed on your desktop during installation. Alternatively, you can go to the directory "Program Files/NPPS/NPPS Case Manager" and locate the file named NPPS Case Manager Demo.mde and double click on the file to load the demo program.   For convenience, we suggest that you create a shortcut to the demo file on your desktop.

Case Manager Software Setup.pdf – This is the Case Manager Software Setup Manual that is the first document you should read. It will enable you to set up all areas of the software after installation, which will make entry of records a highly automated procedure.   You should print this onto 3 hole paper and place it in a 3 ring binder.

Case Manager Software User Manual.pdf – This is the Case Manager User Manual, which describes the use of all areas of the software, and contains simple to follow screen shots of program functions.   You should print this onto 3 hole paper and place in a 3 ring binder.

License.txt – The Case Manager License Terms.

Backup1 – **Backup2 –**   When you conduct a "multiple backup" from within the Case Manager Program, the database is backed up and placed in these two folders. C:\Program Files\NPPS\NPPS Case Manager\backup1   C:\Program Files\NPPS\NPPS Case Manager\backup2

Note: The backups reside on your local computer, and if your computer should crash, you would lose this data. For this reason, it is strongly suggested that you also make "external backups", such as installing a second internal hard drive or an EXTERNAL hard drive (recommended). They are inexpensive devices.

Affidavits –   When you a print a document (such as an affidavit), a SNAPSHOT of the document is automatically taken, and placed in this file, and later uploaded to your Online Case Information Status database when you upload records to the Internet. This enables your clients to view all affidavits online. You can also upload "scanned affidavits" with "signatures" and notary signatures, which are addressed in the User Manual.

Scans – This is where scanned affidavits are stored, which are uploaded to your "Online Case Information Status Database" when you upload records.

Photos – This is where you will store photos of employees and contractors if you want to include a photo with their record (see user manual).

Network Installation Instructions

A network consists on multiple computers located at the same business location on which you install the Case Manager Software, so that all of the computers can access the same database information.

Installation and software activation on a network is much the same as installation on a single computer, with some exceptions. To install the software on a network consisting of 5 computers (as an example), do the following:

1. Copy the TWO Case Manager "executable" installation files to a CD (FULL VERSION and UPDATE VERSION). If you do not have a CD burner, then you must "download" the FULL Case Manager program file and UPDATE program file to each workstation.

2. You must first install the FULL VERSION on the computer on which you intend to install all of your data (database) when entering process serving records (we will refer to this as the MAIN COMPUTER). Double click on the Case Manager executable file This installation not only installs the Case Manager program, but also the database file where all process serving records that you enter will be stored. Each of the computers in the network will be able to independently access the database that is located on the MAIN COMPUTER.   The MAIN COMPUTER should be your most powerful computer (meaning the fastest CPU, most memory, etc).

As with the single computer installation, when you first load the full functioning version of Case Manager, the below Registration Screen will appear, requiring that you enter a "Contact Name", "Company Name" and "Authorization Code", which will be emailed to you by your NPPSN representative. You must enter this information and submit it. This MUST be done <u>while you are connected to the Internet</u>, as your Authorization Code is submitted to NPPSN' main online registration database where it is "confirmed" and automatically activates your Case Manager Software so that it can be used. **You must be connected to the Internet when you install the software.**

NPPS Case Manager Registration

Case Manager has a unique Copy Protection method. On each network there is ONE copy of Case Manager that Serves as a Gate Keeper for all other copies on the same network. This Gate Keeper is called the Authorization Server. This Server will connect directly to NPPS over the Internet to verify and renew your licenses. If you only use one copy of Case Manager you don't need to worry about any of these issues.

Enter the Authorization information in the fields below. This information was delivered with your Case Manager Software.

NPPS Authorization:

Contact Name: Donald Weathers

Company Name: Associated Attorney Services, Ltd.

Authorization Code: xxUO-+Fd0-VoU=

Client Authorization

Choose this if this is one of your network workstations. ☑

Register   Cancel

2. After activating the software on your main computer, you will then install Case Manager on the other four computers (we will refer to these as WORKSTATION COMPUTERS). The program that installs Case Manager will ask you to choose the type of installation. Make sure you choose *Workstation* when installing the other 4 computers.   The workstation installation installs the Case Manager program, but not the database, as all 4 computers will be accessing the database located on the Main Computer.

At this point DO NOT try to load Case Manager on any of the four computers it was installed on.

3. You now need to set up the ability for WORKSTATION COMPUTERS to access the Case Manager database that was installed on the MAIN COMPUTER. This step will be very easy if you have worked with networks previously. If not, is can be a little tricky.

What you need to do is to create what is known as a "*Share Name"* on the MAIN COMPUTER that allows the WORKSTATION COMPUTERS to access to the Case Manger database file that was installed on the Main Computer. The steps to do this vary somewhat from one operating system to another. For the purposes of this manual we will use Windows 2000 as an example. We have provided screenshots of Windows 2000 setup procedures.   If you do not use Windows 2000, the screenshots may not apply to your installation, but the concept remains the same.
If you retain a network consultant, they will fully understand what is required from reading this Networking section, and they can feel free to phone NPPS' support department for any questions they might have.

**The following steps can only done on the MAIN COMPUTER:**

STEP 1: Open Windows File Explorer. This can be done by Right-Mouse clicking on the Windows Start button and then clicking on *Explore.* Using Explore, browse to the location where Case Manager was installed on the MAIN COMPUTER. The default location for Case Manager is C:\Program Files\NPPS\NPPS Case Manager.

Once you browse to this location, click the right mouse button while pointing to the ***NPPS Case Manager*** folder. Below is a figure showing a small part of the Windows File Explorer window with the menu that appears after right clicking on the ***NPPS Case Manager*** folder. The menu that appears on your computer might look a little different then this image.
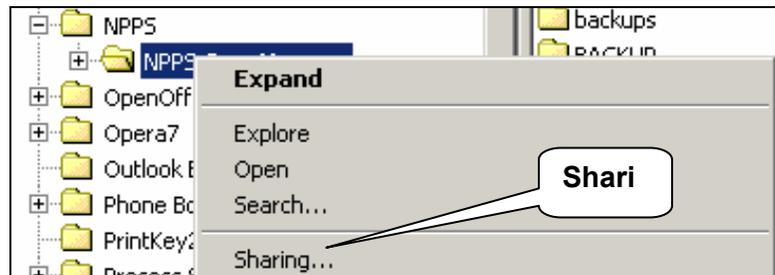
The important item on this menu is the item labeled "***Sharing".*** Click on the ***Sharing*** menu item.

(**Note:** If the Sharing menu item does not appear in this menu then the MAIN COMPUTER is not configured to share data. This feature can be added by changing the MAIN COMPUTER's network configuration and adding the ability to share it's resources. Further details about this are beyond the scope of this manual and require that you contact your local network specialist.)
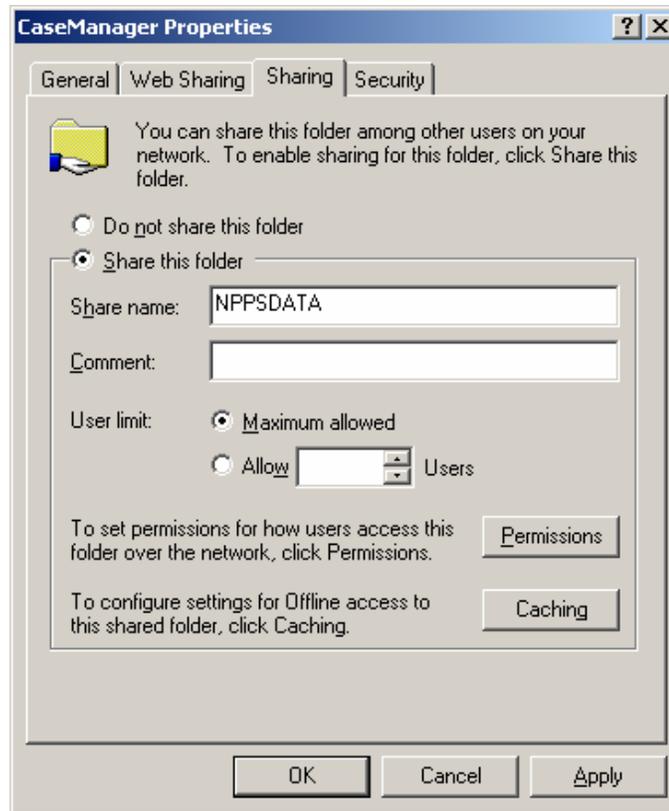
STEP 2: When you click on the *Sharing* menu item The window shown above will appear. Please note, that this may look different depending on the Windows Operating system you are using.
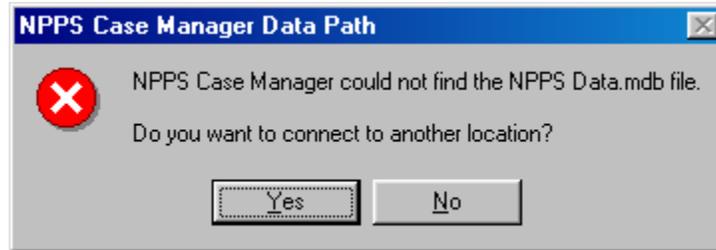
On this screen click on the "*Share this folder option" (shown above)*. Then in the *Share name* field enter the name *NPPSDATA* (all upper case letters).
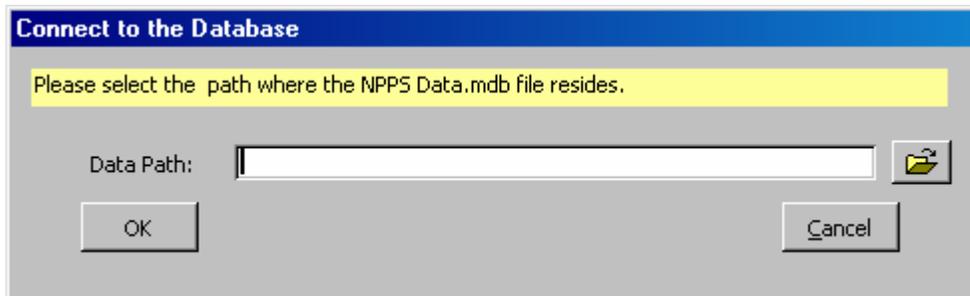
Then click the OK button.

You have now created a *Share Name* on the MAIN COMPUTER that the WORKSTATION COMPUTERS will use to connect to the Case Manager Database that was installed on the MAIN COMPUTER only..

STEP 3: You are now ready to connect each of the WORKSTATION COMPUTERS to the MAIN COMPUTER (commonly referred to as creating a network connection, or setting up a network). There are two parts to this process. The first is establishing a connecting to the Case Manager Database on the MAIN COMPUTER; the second is "activating a share license" that enables the WORKSTATION COMPUTER to operate the Case Manager software. These parts are described in Steps 4 and 5 below, and you must repeat these steps for each WORKSTATION computer that you Install Case Manager on.

STEP 4: To establish a connection to the Case Manager Database on the MAIN COMPUTER from the other 4 computers (Workstations), run (load) the Case Manager program on each WORKSTATION COMPUTER that you have already installed Case Manager on. Case Manager will detect that it does not have a copy of the database (which it does not) and will display the following pop-up screen:

NPPS Case Manager Data Path

❌ NPPS Case Manager could not find the NPPS Data.mdb file.

Do you want to connect to another location?

[Yes]   [No]

Click the **Yes** button.

Connect to the Database

Please select the path where the NPPS Data.mdb file resides.

Data Path: [   ] 📂

[OK]   [Cancel]

When you click on the YES button, the above screen appears asking you to "Select the path where the NPPS Data.mdb file resides (is located).

This path consists of the "name of the Main Computer" and the "share name". This information will tell the WORKSTATION COMPUTER where to locate the database on the MAIN COMPUTER.

 The data path must be in this format: **\\NAME OF MAIN COMPUTER\SHARENAME**

We have already discussed how to create a SHARE NAME, so whatever share name you entered during Step 2 is the one that you will enter in the second part of the data path field.

Each computer on your network has a name.   **If you know the name of the MAIN COMPUTER** enter it in the first part of the data path field.

For example lets say the name of your MAIN COMPUTER is *hightower10* and the Share Name is NPPSDATA. We would enter the following into the **Data Path** field:

\\hightower10\NPPSDATA

Case Manager will check to make sure it can find the Case Manager database at this location. If it cannot it, will tell you that it can't.

If you don't know the name of your MAIN COMPUTER - you can search for it on your network. This can be done by clicking on the Folder Icon to the right of the *Data Path* field. This will display the below screen or something similar. The items shown on this screen may vary depending on your operating system.

What you want to search for is *My Network Places* (on some computers it may be called *Network Neighborhood*). Open *My Network Places* if it is not already open (click on the + sign to the left of it). You may see a list of computers right away or you may need to click on *Computers Near Me*. This depends on your operating system.
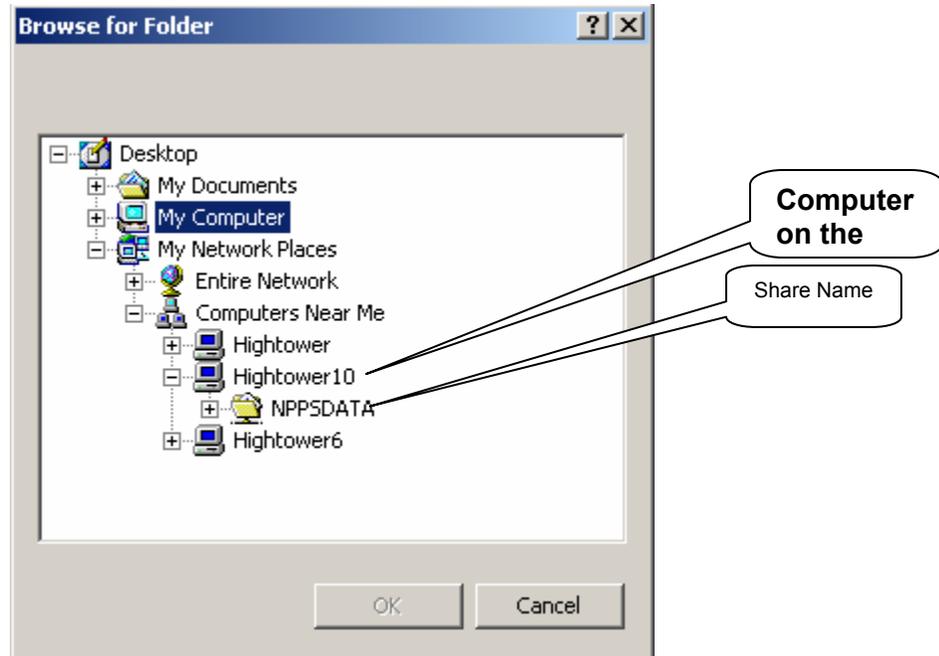
If you are not sure which of the computes on the network is your MAIN COMPUTER then click on the + sign to the left of each computer name (represented by small computer screens on the above illustration). Clicking on a plus sign will display the Computer Share Name. You are looking for a Share Name called: *NPPSDATA*

Once you locate the NPPSDATA share name click on it with your left mouse button and then click on the **OK** button. Case Manager will conduct an immediate search to confirm that the Case Manager database exists in selected location. The *Data Path* field on the *Connect to Database* window shown in Step 4, will automatically be filled in. Click the **OK** button. Case Manager will shutdown. You will need to start Case Manager again so it can be "activated" (authorized to function).

Note for installations on a single computer - In the blank "data path" field (Step 4), enter the path to the NPPS Data.mdb file, which by default is c:\Program Files\NPPS\NPPS Case Manager (unless you selected another location during installation on your main computer). This information will tell the Case Manager Program where to locate the NPPS Data.mdb database file so that you can perform read and write functions when entering records into the database). If you did select another location during installation, just click on the file folder icom to the right of the data path field, and browse to the directory (folder) where you installed the Case Manager program and click on that folder. That path will then appear in the data path field. Then click OK to save.

STEP 5 – This is the last step in setting up your computer network, which is "Activating The Case Manager Installations" on each WORKSTATION so that each computer receives "authorization" to use the Case Manager Software.

Since the MAIN COMPUTER is the only one that contains the original license for software use, each Workstation must in turn receive "authorization" from the MAIN COMPUTER to use the Case Manager Software license as part of a network.

Stated another way, the WORKSTATION COMPUTER must ask the Case Manager program running on the MAIN COMPUTER if it can be authorized to function on the WORKSTATION. For this purpose it is important that the Case Manager Program on the MAIN COMPUTER is turned on and functioning prior to conducting Step 5.

Begin Step 5 by starting up Case Manager for the Second time on each WORKSTATION COMPUTER (one at a time). When Case Manager re-starts on each Workstation it will find the database, and will recognize that it is not registered yet. It will ask you to enter a registration code.

NPPS Case Manager Registration

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Please Remember to enter you Name and Company Name EXACTLY as it is written on your card.

NPPS Authorization:

Contact Name [   ]

Company Name: [   ]

Authorization Code: [   ]

Client Authorization

Choose this if this is one of your network workstations. ☑

[Register]   [Cancel]

Since you have already registered the MAIN COMPUTER with NPPS upon installation, you will not have to do anything except to click on the check box labeled *Client Authorization (Choose this if this is one of your network workstations)*. Once checked, click on the *Register* button. After several seconds a screen on the WORKSTATION COMPUTER will inform you that Case Manager is registered to function on that computer. Your Work Station computer will then shut down. The next time it starts, Case Manager will be fully functional on the Workstation and be able to enter and edit records and print all forms.

REMINDER: Repeat steps 4 & 5 for each WORKSTATION COMPUTER.

PLEASE NOTE: This last step of authorizing the WORKSTATION COMPUTER will not work if the network is not setup in a very specific way. Every computer on your network running Case Manager, including the MAIN COMPUTER needs to have the TCPIP networking protocol installed. In addition each computer must have an IP number assigned to. The steps to do this vary from computer to computer, and are beyond the scope of this manual. It is recommended if you are not sure how to do this that you contact with a local computer professional.

Network Technical Specifications and Requirements

This section is primarily meant as a reference tool for a technician who is helping you set up your network for Multi-User Case Manager use.

- You should not use a Wireless network. NPPS Case Manager is a high-end program and requires fast access to the network.
- You should use 100megabit Network cards in all your computers. 10 Megabit cards will work but performance will suffer.
- The device that connects you computers together on the network should be a 100 Megabit Switch. Switches and Hubs are different things. Stay away from Hubs. A 10 Megabit Hub will work, but performance will suffer.
- Although you could get away with using Windows 98 as a File Sharing computer system, it is recommended that you use Windows NT, 2000 or 2003 server. Windows XP can also be used to share the NPPS Data.mdb file, but can only support a total of 10 Users at one time.
- You must have a TCPIP network protocol set up for each computer. This means that each computer must be assigned an IP number either through manual entry or a DHCP server. The purpose for this is that the CLIENT WORKSTATIONS use TCPIP to confirm their Authorization Status with the MAIN COMPUTER.