

Before you start...

Important note:

To successfully install *De Novo CaseMgr* on your computer, you must have *Administrative privileges*. In *Windows XP* and *2000*, this means you must have an *administrator account*. If you are the only one who has used your computer, you almost certainly have one. If a supervisor set it up for you, you may have to ask that supervisor to install software for you.

After the software is installed, both the Program and Data folders, you must have *full read-write access* to both, and to any subfolders in them.

Finally, virus-checking software can cause drastic slowdowns, and sometimes error messages, if they are allowed to check the shared *CaseMgrDATA* folder while it is in use, or the local *cache* folder inside the *De Novo CaseMgr* program folder while it is being used.

Installation orientation

Here's what you'll be doing to install your new *De Novo CaseMgr* software...

Network Installation:

1. Install a shared data folder for *De Novo CaseMgr* using the data folder installer. This installer is named *CaseMgrData.exe*, and is a self-extracting zip archive. The installed folder is named *CaseMgrDATA*. Install the data folder on a shared network drive; this is ordinarily on the file server, if you have one.
2. Install a *local* program folder on each licensed workstation, using the program folder installer. This installer is a file named *Setup.exe*, if you're installing from a CD, or *CaseMgrSetup.exe* if you're installing using an installer downloaded from our website. Depending on your Windows preference settings, Windows may show or hide the ".exe" file extension.
3. Use the Windows "Map Network Drive" function (check Windows Help using the keywords "map network drive" if you're not familiar with network drive mapping) to associate a drive letter with the *CaseMgrDATA* folder or with the drive or folder which contains the data folder. When mapping the drive letter, be sure to check "Reconnect at login" so the network drive is available after a reboot.

Single-station installation:

1. Install a data folder for *CaseMgr* using the data folder installer. This installer is named *CaseMgrData.exe* and is a self-extracting zip archive. The installed data folder is named *CaseMgrDATA*.
2. Install a *local* program folder on your hard drive using the Program Folder installer. This installer will be named *Setup.exe* if you're installing from a CD, or *CaseMgrSetup.exe* if you're installing using an installer downloaded from our website.

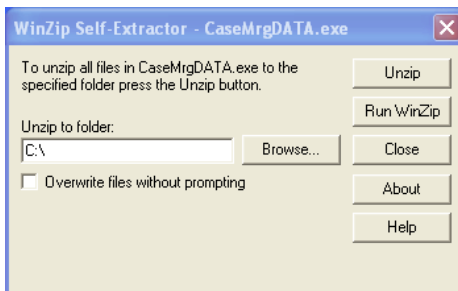
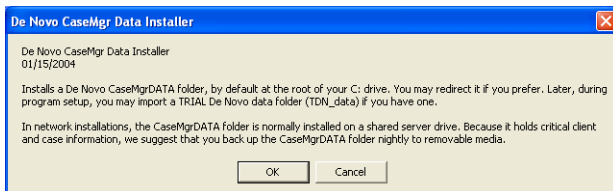
Illustrated, step-by-step instructions follow.

Getting Started

Install Data Folder



Data Folder Installer



Self-extractor Data Installer

Getting started with *De Novo CaseMgr*

There is a folder of documentation files, in *Adobe Acrobat* format, inside the *PDF Docs* folder on the *CaseMgr Install* CD that you may want to print, or at least to view, using *Acrobat Reader* (an installer for *Acrobat Reader* is included on the Install CD, but you may well have a later version already). Let us know about errors in the documentation files. They are a work in progress, the *Export / Merge* chapter in particular, and there are areas of the program requiring additional documentation. We'll make more available as it is completed.

The *Install CaseMgr CD* contains installers for the required local program folder(s), the required data folder (shared in network installations, local in single-user installations) and a few other files which will be described later.

1. Data Folder Installation (on a shared or Server drive in network installations)

De Novo CaseMgr cannot be used until a ***CaseMgrDATA* folder and at least one Program folder** have been installed.

Locate and run the *CaseMgrDATA.exe* data installer, a self-extracting zip archive, to install the *CaseMgrDATA* folder to your desired location (a local drive for single-user systems, or a shared folder drive on your file server, or a shared drive somewhere on your network in a distributed network).

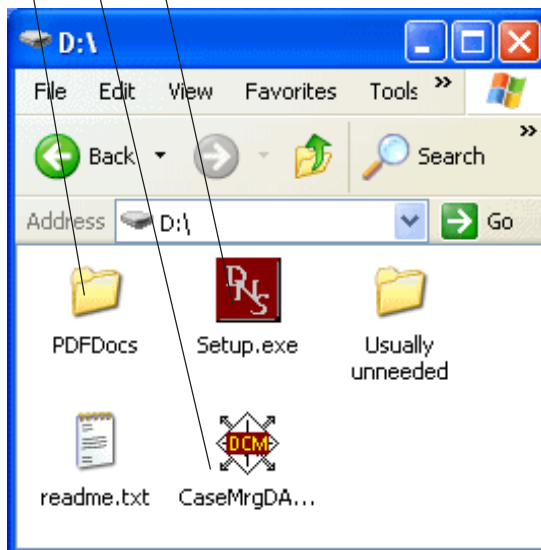
Just double-click *CaseMgrDATA.exe* to show the *De Novo CaseMgr Data Installer* dialog, click the **OK** button, and then the **Unzip** button to extract your data folder to the root of the local C: drive. If the proper destination is elsewhere (a shared server drive, for example, is the usual location in network installations), you can type a path or use the **Browse** button to select a more appropriate destination for the *CaseMgrDATA* folder. Since the whole folder is in the self-extracting zip archive, you need not

Install Program Folder

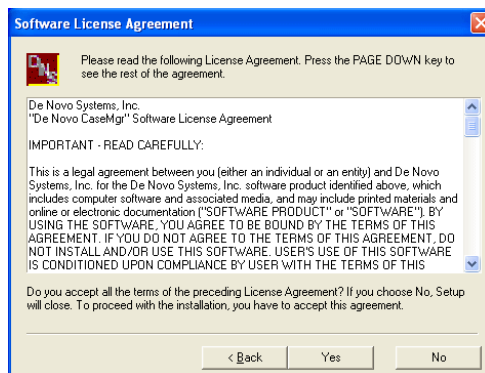
PDF Docs folder

Data Folder Installer

Program Folder installer



Installation CD



Installer License Panel

enter the folder name in the path. Entering T:\Test Data\ would, for example, place the *CaseMgrDATA* folder on your T: drive, *inside* a folder named Test Data.

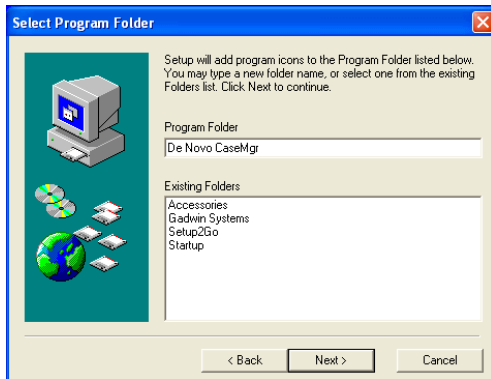
You normally install only one *CaseMgrDATA* folder. You must also “map a network drive” on each workstation, if that hasn’t already been done, to associate the drive that holds your data (or the data folder itself) with an unused drive letter. Use *Windows Help* if you need assistance with mapping a network drive.

2. Local Program Folder Installation

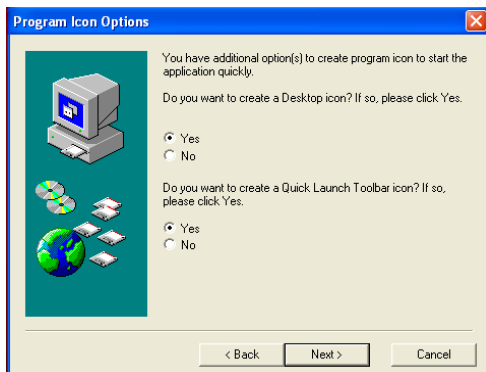
To install your local *De Novo CaseMgr* Program folder, run the *Setup.exe* program on the *CaseMgr Install* CD or a copy downloaded from our website. Downloaded installers are named *CaseMgrSetup.exe* and do not include Adobe’s *Acrobat Reader* installer, but you can get a copy, if needed, from the Adobe.com website. (A *CaseMgrDATA* folder is also needed before you can run the software-see page 2.)

Each local workstation used to run *De Novo CaseMgr* needs a licensed program folder. The installer places a local program folder named *De Novo CaseMgr*, which includes a *ReadMe* file. The CD also holds a *PDF Docs* folder, with (still partial) documentation in *Adobe Acrobat* format. This folder is installed automatically inside the *De Novo CaseMgr* program folder on local workstations, but the installer for *Acrobat Reader*® is not installed. Find it on the CD if you have one, or download it from Adobe.com if necessary. The following illustrations will describe the controls of the *Install utility* used to install the *De Novo CaseMgr* program folder.

Immediately after you run the *Setup.exe* file (it may be called simply “*Setup*” depending on your *Windows Preferences* settings), a *De Novo Systems* splash screen appears briefly, followed by a software license agreement. Read it and, if you accept, click the **Yes** button to continue (clicking **No** cancels the installation).

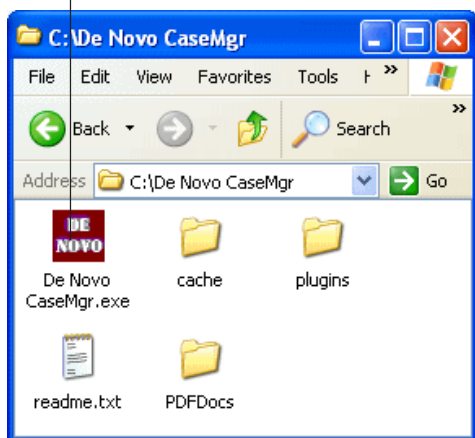


Installer Destination Panel



Installer Shortcuts Panel

Program startup file

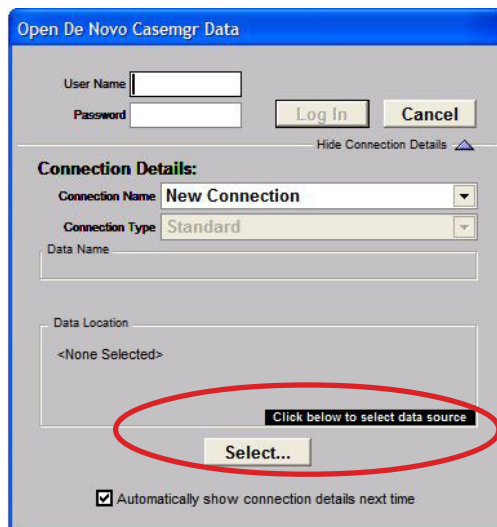
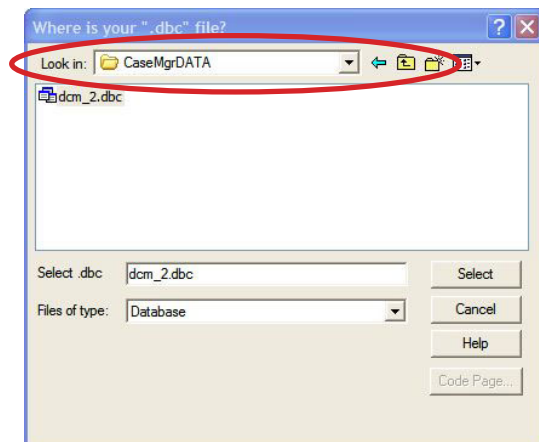
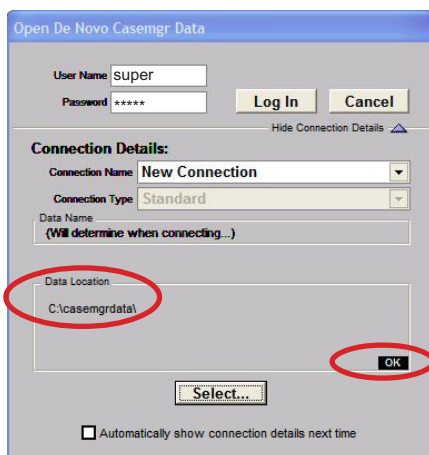


Installed Program Folder

The next *ReadMe* panel provides some basic information about *De Novo CaseMgr*. The following panel displays the default destination for the *De Novo CaseMgr* program folder on your local hard drive. If you prefer to install the program folder in a different location on your drive, you can edit the file path directly (the last part of the path shown, *De Novo CaseMgr*, is the name of the program folder itself) or click the **Browse** button and browse to a preferred folder. **If you use this browse feature to install to an alternate folder, you must type in the program folder name (*De Novo CaseMgr* is recommended) after selecting a folder.** Once the destination is set, click the **Next** button.

After the program folder location is set, a dialog shows the default name of the *Start Button Program Group* (really a shortcut folder, for quick access via the **Start Button**). Just click the **Continue** button to install the group with the recommended name. If you prefer to add a *De Novo CaseMgr Start* button shortcut into a previously installed program group, you may select one from the lower list. Click the **Next** button to move to the next option, which offers to place a *De Novo CaseMgr* shortcut on your desktop (the default is **Yes**) and in your Quick Launch Toolbar (the default is **Yes**). Just click the appropriate radio button to change these defaults if you don't want those shortcuts. After the *Installation Complete* dialog appears, the *Installer* opens the *ReadMe* file, for those who skipped it earlier. The Program folder installed on your local drive should look much like the illustration below left. The startup file is the *De Novo CaseMgr.exe* executable file.

Repeat the installation as described above on each workstation that will run the *De Novo CaseMgr* software.

**Registration Dialog****Select File Dialog****Reg. Dialog w/ data selected**

3. Initial Login

To start your new software, run the *De Novo CaseMgr.exe* executable file. You can start from the **Start** button shortcut, if you installed one, or from the desktop shortcut, or even by going into the *De Novo CaseMgr* folder and double-clicking it directly. Your first startup displays an empty *Registration* dialog box (**the default User Name and Password are both SUPER**).

Begin by using the **Select** button at the bottom of the *Registration Dialog* at left to display a *Select File* dialog, and then use the “Look in” pop-up control to select the correct drive and the *CaseMgrDATA* folder, and then to locate and choose the *DCM_2.dbc* file inside the *CaseMgrDATA* folder. As long as your network connection to the data drive is not interrupted, you need not locate the data again.

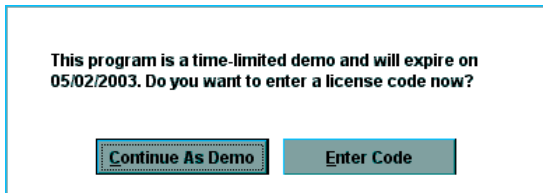
Once you find the *CaseMgrDATA* folder and the data file inside it, and the *Select File dialog* appears as shown at left, just double-click the *DCM_2.dbc*, or alternatively, click it once to highlight it, then click the **Select** button.

At this point, you return automatically to the previous *Registration* dialog, which should now look like the one illustrated below left if you’ve entered the default *super* login id and password. It should now show an **OK** where it previously said “Click below to select data source.” The file path to the data folder is shown in the Data Location box.

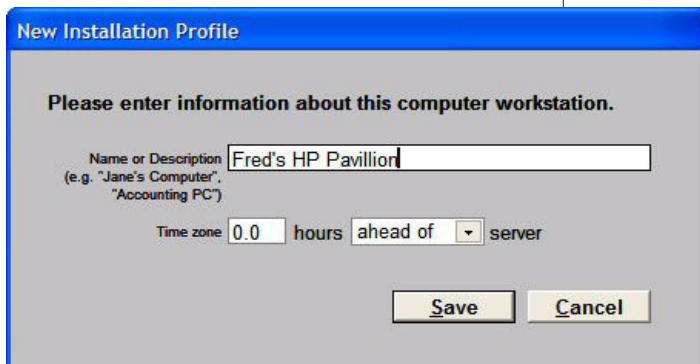
Later logins on this workstation will show just the login fields above the “Hide Connection Details” control, unless you click the “automatically show connection details next time” checkbox. *Connection Details* can be displayed any time by clicking the *Show / Hide Controls* triangle just below the **Cancel** button. Now you can click the **Log In** button (near the top of the dialog box) to proceed.



Program License Dialog



Demo dialog



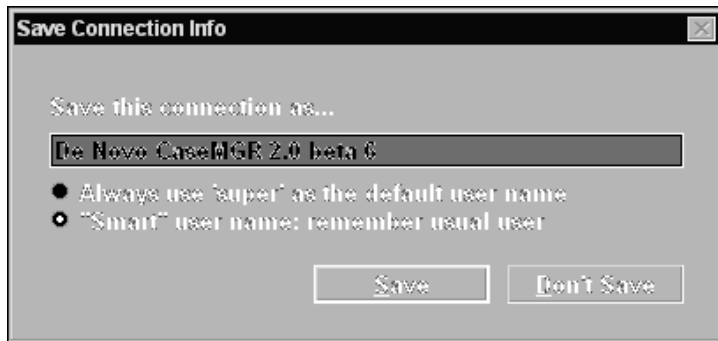
New Installation Profile

The *Program License* dialog window appears on initial login, since all installations are treated as a three-station 30-day trial version until a license code is entered. The license dialog allows updating the license, e.g. from a timed demo version to a standard license, or from a single-user to a 5-station network license. Time-limited versions display such a dialog, offering the opportunity to update to a full version, at each startup. We can email (or verbally provide by phone) an upgrade code.

The *Program License* dialog at left appears automatically on this first login. Click the **OK** button. Subsequent logins in a time-limited version display a demo dialog which announces the expiration date of the time-limited version, and offers users of the trial version an opportunity to display the *Program License Dialog* and enter a new *License Code*. From within *De Novo CaseMgr*, the *Program License Dialog* can also be displayed by selecting the **License...** option from the **Administration Menu**.

Click the **Continue As Demo** button to proceed (or press the *Enter* key).

On your initial login you will see some dialogs which are required only at the initial login on a particular workstation. The first of these is the *New Installation Profile* dialog illustrated at left. It is used to uniquely identify this particular workstation. The *Time Zone* and *Hours* fields are only used in wide-area networks in which workstations may not necessarily be in the same time zone as the data server.



Save Connection Info

The *Save Connection Info* dialog is used to identify this data connection (the link between this workstation and a particular data folder) and allows the user to specify the way the default login name is remembered. The first radio button makes the current login name the one that always appears. The second, or “Smart” option remembers the “usual” user, or the last one to login

twice in succession on this particular workstation.

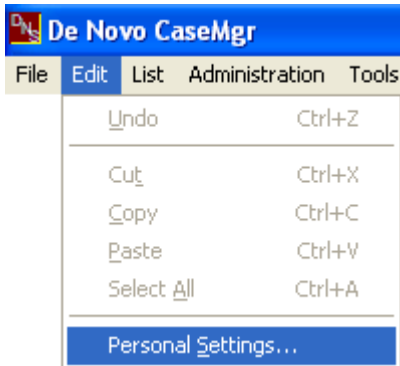
4. Initial Program Setup

When it first starts, *De Novo CaseMgr* opens the *Client* and *Matter Lists* by default. You can control whether these two lists and/or the *Calendar* load automatically at each startup by using the *Personal Settings* option from the **Edit Menu** (see *Installation.8* below). The *QuickStart Checklist* window also appears.



QuickStart Checklist

The *QuickStart Checklist* walks you through initial setup. Moving your mouse over the name of an item displays information about using that item in the *Details* box below the three options. Just double-click an item to activate it. You won't use Items 2 or 3 if you have data to import from **TRIAL De Novo™ v.1.9** (if you haven't already updated your current commercially available version of the *TRIAL De Novo* data folder to v.1.9, please do so via the update files posted on our website before importing your data). **If you are not a current or past user of TRIAL De Novo, this import function does not apply to you**, so skip it and use the other two items to guide you through the initial setup of basic information about your users and your firm. After you have used the appropriate options, **uncheck** the “show this list” checkbox at the bottom so it won't appear at each startup. All three of these processes work with the shared data folder, so they need to be done *only once*, not from each workstation. You may, of course, return to the *Our Firm* and *Users & Groups* setup windows from the relevant **Administration**



Edit Menu: Personal Settings



Create New Record



Window Menu

Menu options.

Please provide us with feedback on how the wizard works for you. If you're importing *TRIAL De Novo* data, please let us know about any data import issues.

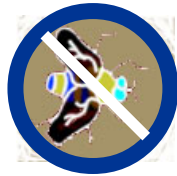
De Novo CaseMgr defaults to opening the *Client List* and *Matters List* on startup. You can change this behavior using the *Personal Settings* option in the **Edit Menu**. These settings control the local program, so changes made here affect only the behavior of *De Novo CaseMgr* on this particular workstation.

To add a new client, matter, attorney, or any other member of one of the *Lists* in the **List Menu**, choose the **New Record** option from the **File Menu** (or press Ctrl-N). The *Create New Record* dialog defaults to offering the record type from the topmost open list, but you can choose any type of record from the popup list.

The **Window Menu** shows a list of your open *De Novo CaseMgr* windows, beginning with the topmost, and working back down (assuming you have several open). You can use it to easily switch between windows.

Considerably more documentation for the features of *De Novo CaseMgr* is provided on the *Install CD* (if you received one) and also in the *De Novo CaseMgr program folder*, within a subfolder named *PDFDocs*. Unless you changed the default option to install a shortcut for this folder, there's a shortcut named "CaseMgr Docs" on your desktop after the program folder is installed. Documentation is in *Adobe Acrobat®* format and the *Install CD* also includes an installer for *Adobe Acrobat Reader®* (but you probably already have a copy installed). If you downloaded your installers for *De Novo CaseMgr*, you can download *Acrobat Reader* from the *Adobe Website* at :

<http://www.adobe.com/products/acrobat/readstep2.html>

Bug Reports (*what bugs?*)**Important note:**

Additional documentation is provided in the form of *Adobe Acrobat* files, in a folder named *PDFDocs*. Find it within the installed *De Novo CaseMgr* program folder inside the Programs folder on your local C: drive (there should be a shortcut on your desktop). There's also a copy on the CaseMgr Install CD. As additional documentation is generated, it will be made available for free download on our website:

[HTTP://CASEMGR.COM](http://CASEMGR.COM)

(You will probably want to take a look at the *Lists* chapter of the documentation next.)

5. Problem reporting procedures

Please email feedback and reports of problems to support@denovosys.com. Make the Subject line of the email begin with the word "CaseMgr" and include the version of Windows (*Windows XP*, *Windows 98 SP2*, etc.). Don't forget to tell us who is sending the report, and what firm you're working with (this isn't always obvious from an email). If email is inconvenient, you can also fax problem reports to us at 360-693-3116. Telephone support is normally available at 360-695-9372 from 9 AM to 4 PM Pacific time, Mon-Fri.

A good problem report will enable us to reproduce the problem you have identified (if we can't see it, we can't fix it). **Tell us step-by-step what makes the problem appear**, what you believe *should be* happening that isn't, or what is happening that shouldn't. If *De Novo CaseMgr* should actually crash (unlikely, of course, but not impossible...), you will normally be offered a dialog that includes some buttons including options to *Copy to Clipboard*, *View*, and *Send as Email*. For the most complete report, click the *Copy to Clipboard* button first. This option saves more information than the others. If you then click *Send as Email*, you can paste into your email the content of the clipboard, and the bug report will then be of considerably more use to us in isolating the problem reported.

We're also very interested in your wish list of new features and capabilities. We probably can't make *everything* happen, but we don't want to leave out features you really need. We will be offering upgraded version of the software as they become available. We're eager to know what you have to say, and with your help, to make this software the case management system you've always wanted!