# Sharing CaseMap Data Files with your Partner

When working in teams, it is important for you and your partner to be able to work together on your CaseMap file. This document will assist you in sharing your CaseMap data with your partner.

The easiest way for you and your partner to share case data without a shared server is to create replicas of your file.

The first step is to open your file on the computer of the person wants to be in charge of the Master copy (it is unimportant who has the master, as you will have similar capabilities to enter data in both the master and replica). You should then create a second user name for your partner. For instructions on creating user names, consult the Changing User Names help sheet.

To create a replica, go to the File menu, select "Synchronize" then "Create Replica." Click "OK" when you receive the message about using multiple replicas.
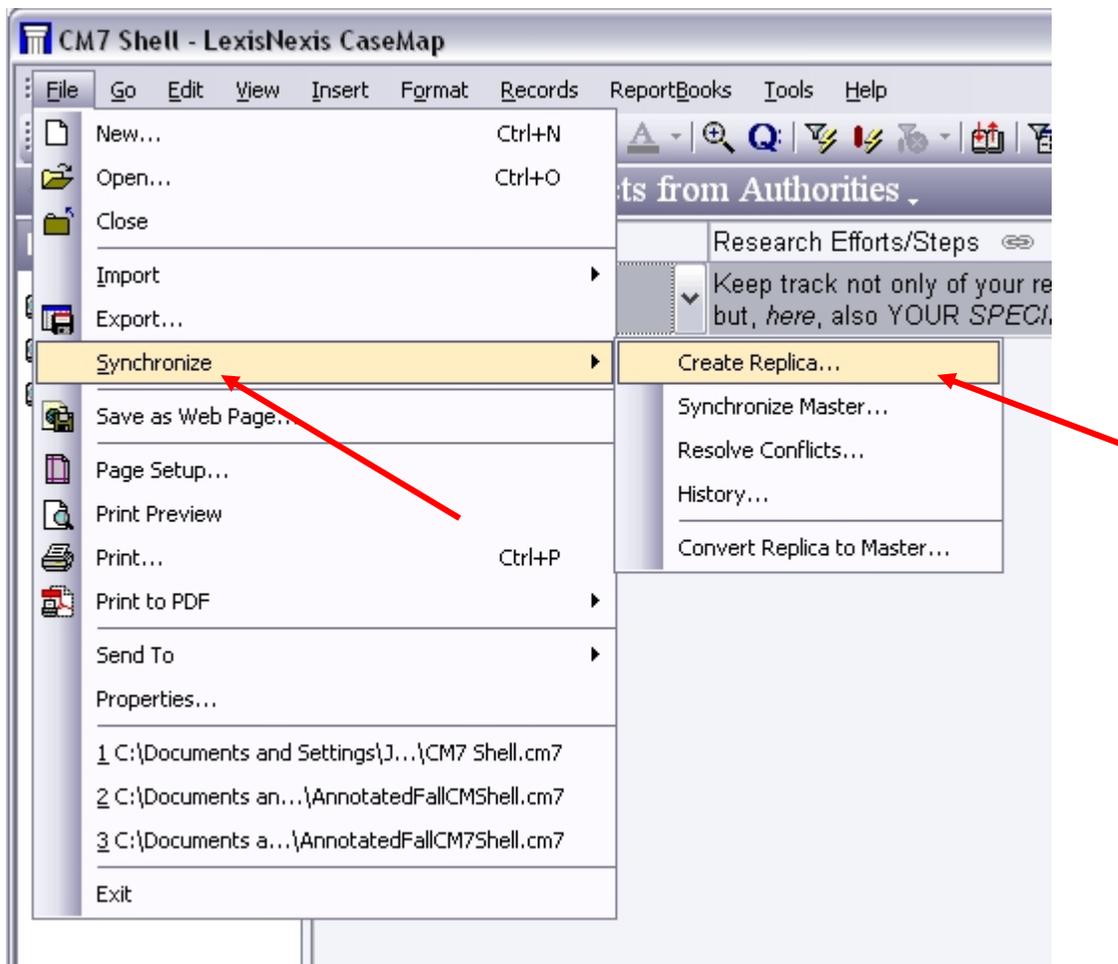
Assign a name for you replica and be sure to save it somewhere that will be easy for you to find. You will be emailing or otherwise transferring the replica to your partner.

Once you choose "Save" you will have a new window. For now, choose "Do not open a case." You may add comments as a way to identify the replica, but this is not mandatory.

Transfer the replica to your partner's computer. Now your partner can work within the replica while you work in the master copy.

There are a few things you will not be able to do while using the Master/Replica file. The Mast may not delete Issues, because the replica might be using them. The Replica may not create new fields or add new staff members. If you come across other limitations do not be alarmed. Once you have synchronized your files you will regain all capabilities.

Once you are ready to merge the files together, have the partner with the replica transfer it back to the partner with the master.

Open the Master file in CaseMap. Select the File menu, then "Synchronize," then "Synchronize Master." This will bring up a window that allows you to browse for the replica file. Find it, and then choose "Open." Select "Yes" when asked if you would like to continue. You will be asked if you want to delete the old replica. Most likely you will choose "Yes."
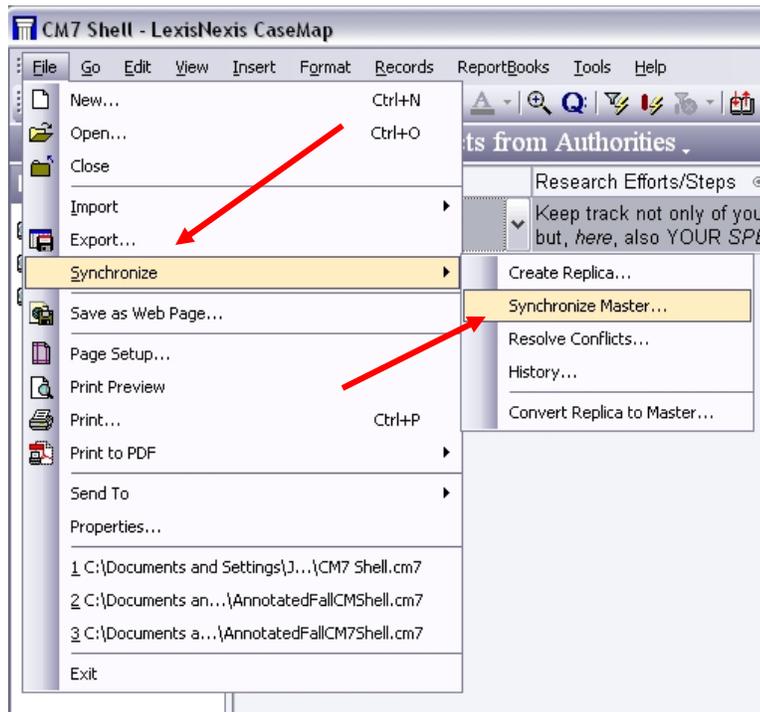
The last step is to resolve conflicts between the Master and Replica. To do this, select the File

menu, "Synchronize," "Resolve Conflicts." You will be walked through any conflicts in your document (places where the two documents have conflicting data). Each time you may choose to keep the Master version, the Replica version, a hybrid, or to skip that conflict.

After resolving all conflicts you have successfully synchronized your files. To work separately again, repeat this process, creating a new replica for your partner.