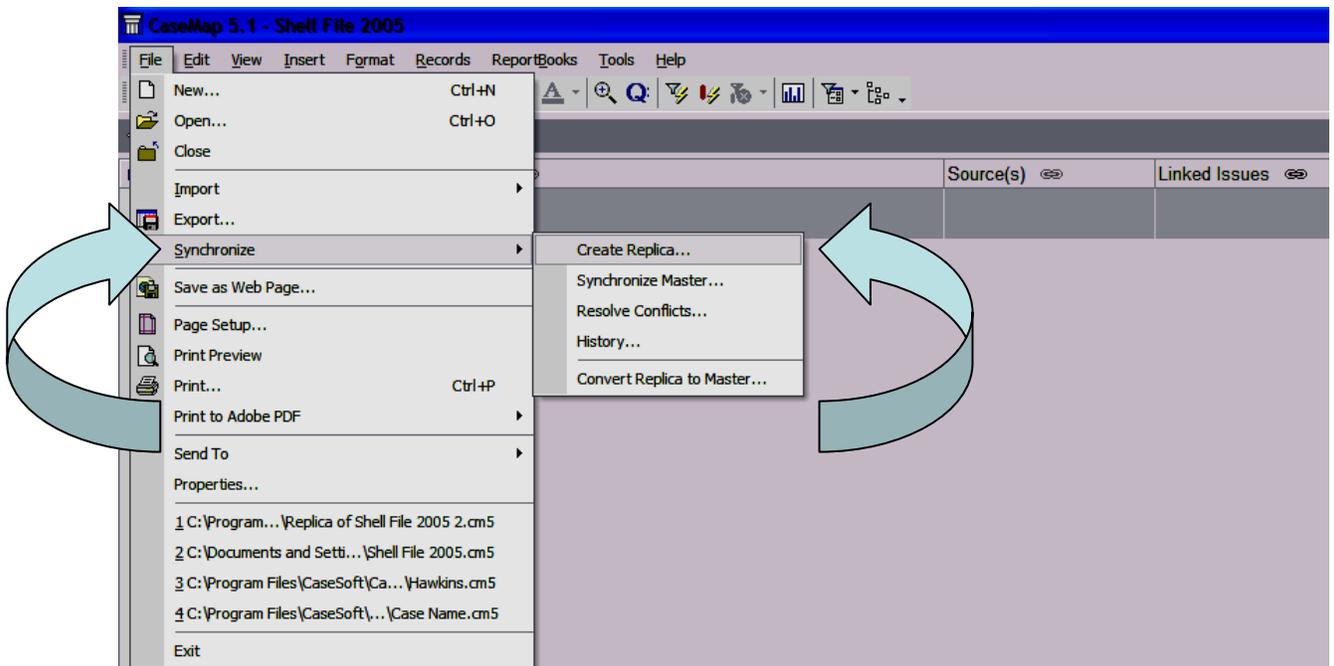


Sharing CaseMap Data Files with your Partner

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.

1. The easiest way for you and your partner to share case data without a shared server is to create replicas of your file.
2. The first step is to open your file on the computer of the person who 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 more information on how to do this, consult the Changing User Names document.
3. To create a replica, go to the File menu, then select Synchronize, and Create Replica. Click OK when you receive the message about using multiple replicas.



4. Assign a name for your replica, and be sure to save it somewhere that will be easy for you to find, since you will have to email or otherwise transfer the replica to your partner.

5) Once you choose Save, you will have a new window. For now, choose “Do not open a case.” You may add comments if you wish, as a way to identify which replica this is, but it is not necessary.

6) Transfer the replica to your partner’s computer. Now you can work within the replica and master files separately.

7) There are a few things you will not be able to do while using Master/Replica files. The Master may not delete Issues, for example, because the replica might be using them. Additionally, 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 those capabilities.

8) Once you are ready to merge the files back together, have the replica partner transfer the replica file back to the master partner’s computer.

9) 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, 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. Choose Yes.

10) The last step is to resolve conflicts between the Master and Replica. To do this, select File, Synchronize, Resolve Conflicts. You will be walked through any conflicts in your document (places where the Master and the Replica entered conflicting data). Each time you may choose to keep the Master version, the Replica version, a hybrid, or to skip that conflict.

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

