Installation Guide

Introduction

Welcome to Forms Workflow, the leading provider of court, agency, and regulatory forms. For more than 15 years, Forms Workflow has been the trusted source of forms for businesses and firms of all sizes, including more than half of the Am Law 100 law firms. By subscribing to this product, you are receiving not only access to our valuable content library, but also to our cutting-edge technology.

This document will walk you through the installation process for the Microsoft Word Integrated Toolbar, which provides quick access to forms directly within Microsoft Word, as well as powerful capabilities for automatically filling in forms, managing profiles and favorites, assembling jury instructions, and much more. For more information on Forms Workflow and the various ways it improves efficiency and reduces risk, please visit *https://formsworkflow.com*.

First, Determine the Appropriate Installation Method

The first step to installing the Microsoft Word Integrated toolbar is to determine which install method to use. The appropriate method depends on your organization's size and policy:

- If you are a sole proprietor or in a small- to mid-sized law office or business – use method A.
- If you are in a large law firm – use method A or B as advised by your IT help desk or administrator.

Method A – System Requirements

Operating System - *Windows 7, 8.1, 10 (both 32- and 64-bit supported for each)*

Microsoft Office - *2010 & 2013, 2016 (32 bit only)*

Microsoft .NET Framework - *4.5.2 or higher*

Visual Studio 2010 for Office Runtime Tools - *Required to run Microsoft Office based solutions built using Microsoft Visual Studio 2010, 2012, 2013 and 2015*

Firewall / DNS / Web Access - *Must have capability to access* https://www.formsworkflow.com

Method B – System Requirements

Supported Server Requirements

Server Operating System - *Windows Server 2008 – 2016*

Database Server - *SQL Server 2008 – 2016*

Firewall / DNS / Web Access - *Must have capability to access* https://www.formsworkflow.com

Supported Client/Workstation Requirements

Operating System - *Windows 7, 8.1, 10 (both 32- and 64-bit)*

Microsoft Office - *2010, 2013, 2016 (both 32- and 64-bit)*

Microsoft .NET Framework - *4.5.2 or higher*

Visual Studio 2010 for Office Runtime Tools - *Required to run Microsoft Office based solutions built using Microsoft Visual Studio 2010, 2012, 2013 and 2015*

Firewall / DNS / Web Access - *Must have capability to access* https://www.formsworkflow.com *and the selected SQL server host*

Method A – Local Profile Database (Microsoft Access)

Method A, generally used by sole proprietors and small-to-mid size law offices and businesses, will store profiles on your local workstation using the MS Access framework.

Installation Steps

1) ### Extract the file to your desktop

    Open the file that you just downloaded in Step 1. You will see a folder inside. Right-click the folder and select *Copy* as shown in the screenshot below:
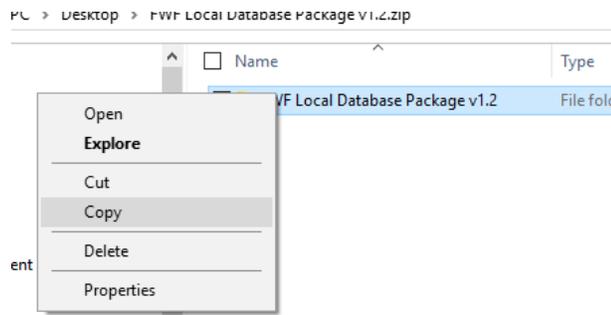
    Right-click on your Desktop and select *Paste*. You should now see the folder directly on your Desktop.

2) ### Run "setup.exe" as administrator

    From your Desktop, go to the folder you pasted in Step 2. Right-click on *setup.exe* and select *Run as administrator* as shown in the screenshot below:
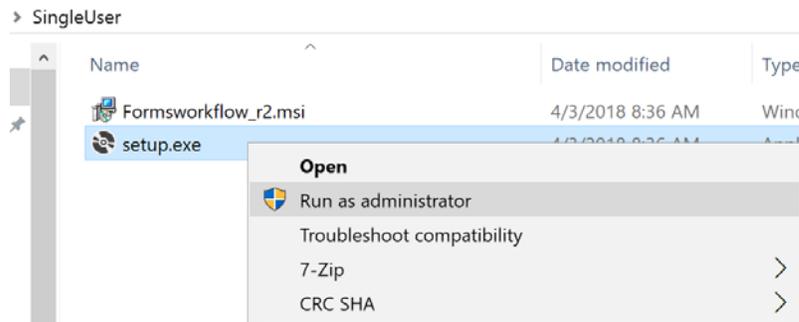

    Important Notes:

    - If you do not see the *Run as administrator* option when right-clicking the file, please contact your IT help desk or administrator for assistance.
    - The installation process may take anywhere from a few seconds to a few minutes depending on your machine's specifications.
    - You will see the following window appear (Tip: depending on your machine and opened programs, it may appear in the background. In such a case, you should see a flashing icon in your taskbar at the bottom of your screen.
    - Minimize your other programs or click it to see the window). Click *Next* as needed and then *Close* when it is finished installing.

3) Open the Toolbar in Microsoft Word and Enter Your Username/Password

Open *Microsoft Word*. Click the *ALN Forms Workflow* tab at the top of your ribbon and then click *Settings.*
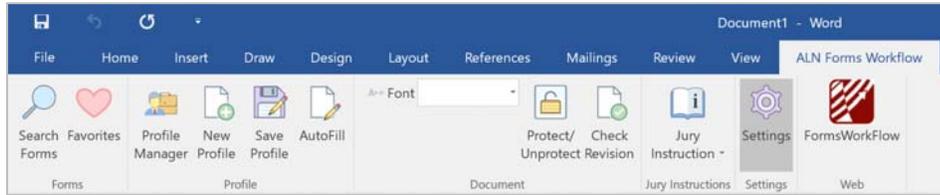
The following settings window will appear. In the *Locate Forms* section in the middle (**not the *Auto Fill* section at the top**), enter your *User Name* and *Password* for Forms Workflow.

Tip: your user name and password is always the same for the Toolbar as for the FormsWorkflow.com web site.

Congratulations! You've completed the install process and can now use the Toolbar within Microsoft Word. For more information on how to use the product, please see our Video Tutorials or User Guide.

Method B – Centralized Profile Database

Method B, generally used by large law firms, will store profiles in a centralized database.

Initial SQL Server Setup (IT / System Administrator Only)

The following steps have to be done only once for your firm. These will prepare the profile database for all client workstations to connect to from that point forward.

1) Run *Database Configurator.exe* as administrator

   Tip: this file will be provided to you by the American LegalNet Technical Support Team.
   Click *Next,* and you will see the following settings window appear:
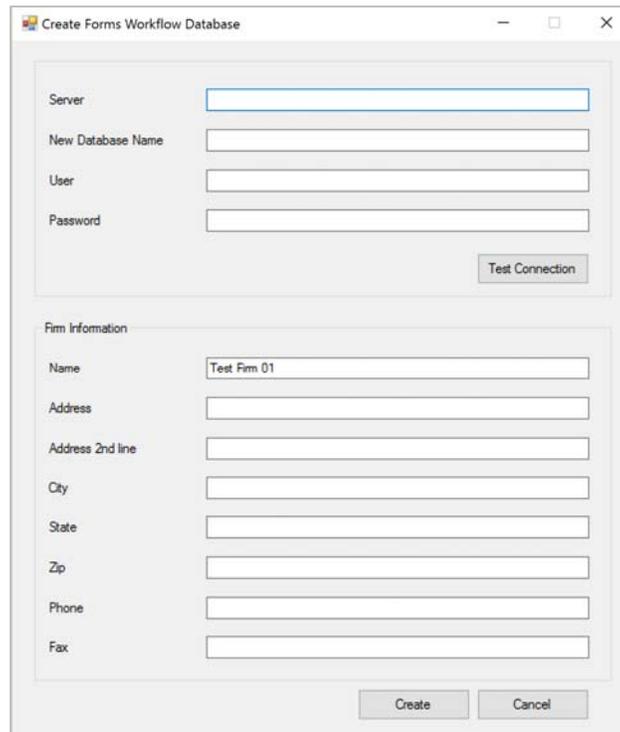
2) Enter your database and firm information

   Fill in the top section as follows:
   Server – IP address of your SQL server
   New Database Name – a name of your choosing for the profile database (e.g. "FormsWorkflowCentral")
   User – SQL account, DB Owner or Syst Admin
   Password – password for that SQL account

   Fill in the bottom section with your firm details as desired.
   Click *Create* and close the window.
   Congratulations! Your SQL server is now ready for use, and all needed tables have been created. Please follow the instructions below for each client workstation.

Installation Steps for Each Client Workstation

1) Contact our Technical Support Team for the individual PC install package.

2) Extract the file to your desktop

Open the file that you just downloaded. You will see a folder inside. Right-click the folder and select *Copy* as shown in the screenshot below:
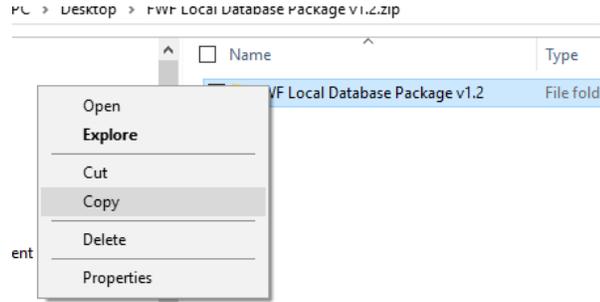
Right-click on your Desktop and select *Paste*. You should now see the folder directly on your Desktop.

3) Uninstall previous toolbar before upgrading to a newer version.

4) Run setup.exe as administrator

In the folder you just copied to your Desktop, right-click setup.exe and select *Run as administrator*.
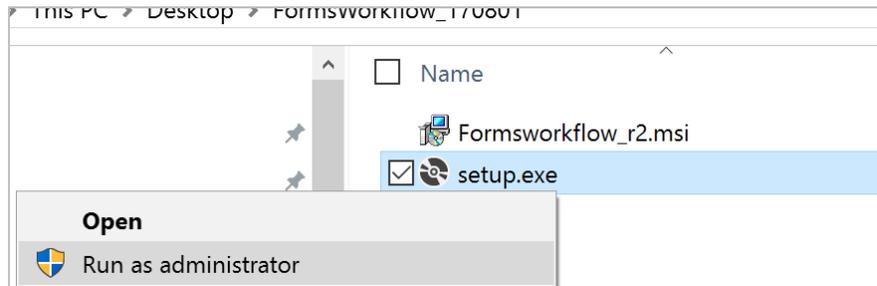
5) Finish the install

You will see the following window appear (Tip: depending on your machine and opened programs, it may appear in the background. In such a case, you should see a flashing icon in your taskbar at the bottom of your screen. Minimize your other programs or click it to see the window). Click *Next*, and then click *Next* until you see the Settings window appear.
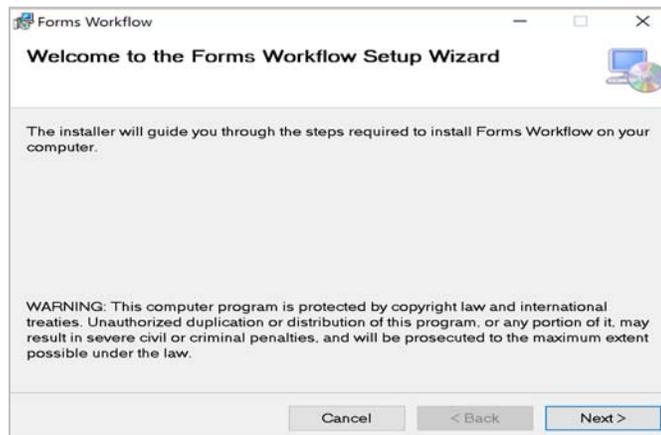
In the Settings window that appears (as shown below), fill in the *Profile Database* section as follows.

Server – the IP address of the firm's SQL server

Database – the name the firm selected for its profile database

User – a SQL server user (who has read/write access to the profile database)

Password – the password for the SQL server user

Important Tip: All this information should be provided to you by your IT department.
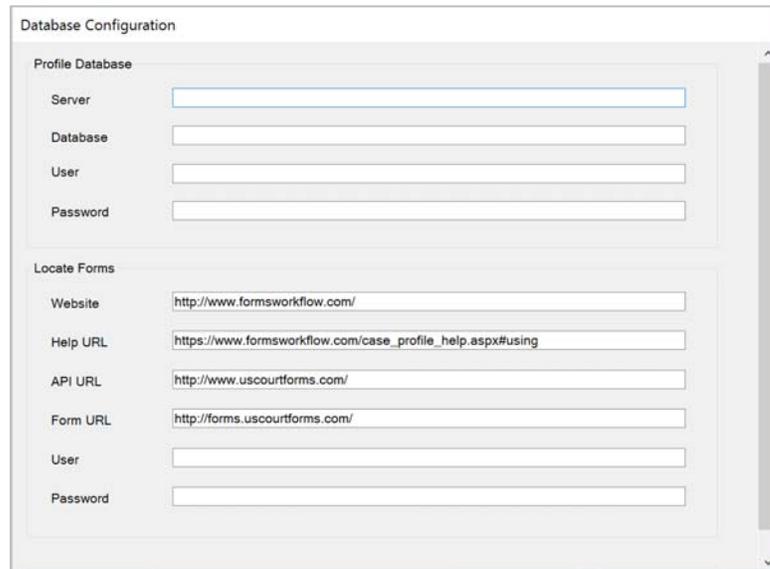
Once you are done filling in the Server, Database, User, and Password fields, **fill in the *User* and *Password* in the Locate Forms section with your Forms Workflow username and password**.

Congratulations! You've completed the install process and can now use the Toolbar within Microsoft Word, which will now appear as a new tab labeled *ALN Forms Workflow* within the Microsoft Word ribbon, as shown in the screenshot below. For more information on how to use the product, please see our Video Tutorials or User Guide.
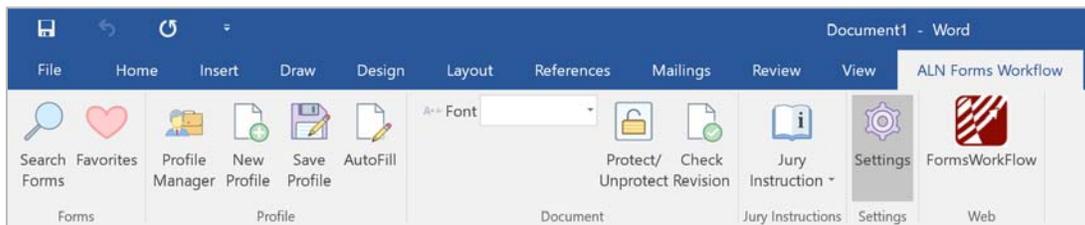
Remote Deployment / Mass Roll-Out Tips (for IT Administrators Only)

The Forms Workflow Microsoft Word Integrated Toolbar is designed to make it easy to deploy across multiple machines and/or offices from a centralized location, as commonly done by our large law firm customers.

The process for doing so is as follows:

1) Follow the instructions in the *Method B* section of this document and complete one machine

   The first step to a mass roll-out is to have the centralized profile database set up, as well as at least one workstation with the toolbar installed on it.

2) Contact our Client Success Team for our special (silent) mass roll-out package

   The special package is designed to facilitate installation without requiring dialogs to be manually filled.

3) Create additional Forms Workflow users (if desired) for target workstations

   Through the https://formsworkflow.com website, use the *My Account* tools to add additional usernames and passwords if desired. Tip: depending on your firm's preferences, you may use shared login credentials office-wide or even firm-wide, or select to have each user with their own credentials. This step is only required if you wish to use non-existing credentials for some or all of the target workstations.

4) Copy *default.config* from the workstation you set up in Step 1, make sure it is correct, and then copy it to each additional workstation

   This file can be found in *C:\Users\(UserName)\AppData\Roaming\Formsworkflow\Configuration* on the workstation you set up in Step 1, and should be copied to the same path for each additional workstation where you are deploying the toolbar.

   Depending on the configuration and setup of the first workstation, you may need to edit the file to reflect the correct information for all the other target machines, if it is different than the first.

   The following fields are the ones you may want to edit: "Name" and "Password" attributes of the <User> tag, which reflect the Forms Workflow username and password; and "source", "database", "dbuser", and "dbpassword" of the <databaseconnection> tag. The database connection fields must point to a valid database, or the Settings window will not open in the toolbar.

   Tip: If your firm would like to use different logins per office, run through the above steps, and simply change the *Name* and *Password* attributes of the *<User>* tag in the *default.config* file on each office's workstations.

5) Use *.bat file to run the silent installer from Step 2 on each target workstation

   Follow your firm's deployment protocols as needed for any additional workstations you are targeting.