

TXdocs RemoteDrive

USER MANUAL

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1 Remote Drive Introduction

NO MORE DOWNLOADS

TXDocs Anywhere is cloud based software. That means the software is running on an internet server instead of on your own computer. That means any documents you assemble will be generated on our internet server instead of on your computer. To edit the assembled document using your own Word or WordPerfect, you must first download the document to your computer.

Downloading a document is simply a matter of clicking the Download button after you assemble a document. The downside to this is, you lose the benefit of TXDocs' document management capability. You will have moved your document out of our system and onto your computer. We will no longer be able to track it and keep it in a case folder for you. In a busy law office generating thousands of documents each year, this is not a very good solution. Remote drive technology will provide you with a cloud based file storage system that works and looks just like a hard drive on your own computer. Remote drives can be set up to automatically copy files to and from your computer. As you add or edit files, your computer and your remote drive will be automatically synchronized so that the latest copy is always available. Once you tell TXDocs how to find your remote drive, we will be part of the synchronization and every document you assemble on our server will be automatically synchronized to your computer. And, the Client/Case folder system that TXDocs uses to organize all of your documents will be automatically maintained on your computer.

TXDocs Anywhere works with the three leading remote drive services - OneDrive Personal, Google Drive and Dropbox. This manual is intended to help you connect your TXDocs Anywhere with any of those three. **OUR RECOMMENDATION** - If you are not already set up to use a remote drive and you want to move your entire operation to cloud based computing, we recommend you start with OneDrive Personal from Microsoft. After that, consider Microsoft's Office365 ProPlus. This product gives you the complete Microsoft Office suite (Word, Excel, Outlook, etc.) both online and on your own computer. This is absolutely the easiest way to use the cloud for all your computing needs. TXDocs' integration with OneDrive and Office 365 makes document assembly in the cloud as seamless as it is using the old desktop technology. (NOTE: You will want to get Office365 ProPlus. It is \$2 per month more than standard Office365 but it has some features that you will need to integrate with TXDocs.) [Click here to visit Microsoft's Office365 website](#) If you have Office 365 and have multiple users with different OneDrive accounts please refer to our Multi Account OneDrive manual.

1.1 Connecting TXDocs To Your Remote Drive

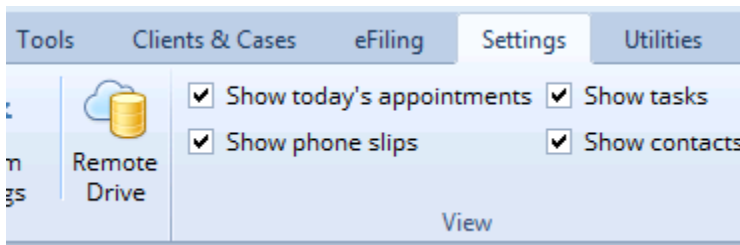
Connecting TXDocs To Your Remote Drive

If you have not already installed a remote drive on your computer, you need to do that before you can connect it with TXDocs. Since we recommend

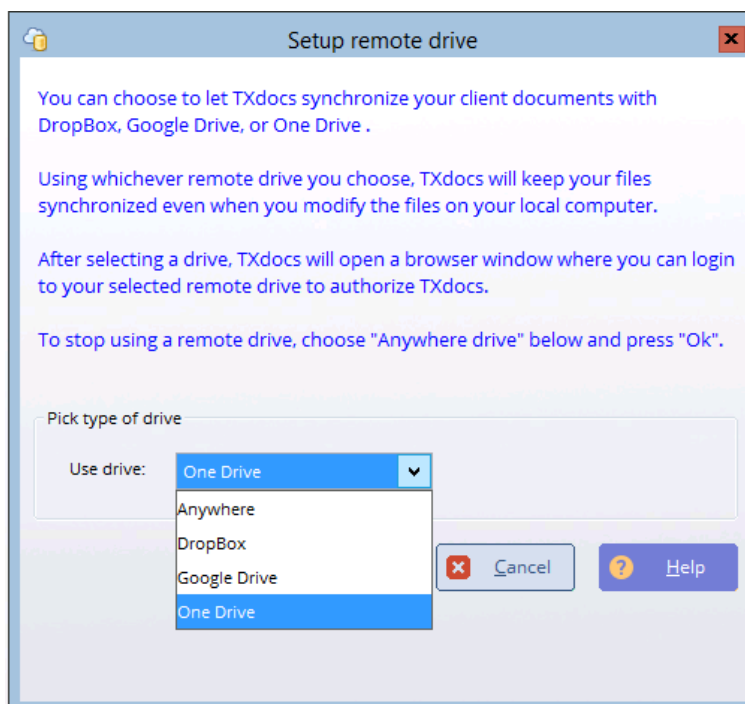
Microsoft's OneDrive (it's free), you can find instructions for downloading and installing it in Appendix 1.

To get started, start TXDocs Anywhere and then follow these steps:

1. Select Setup from the top menu and the Remote drive from the dropdown menu

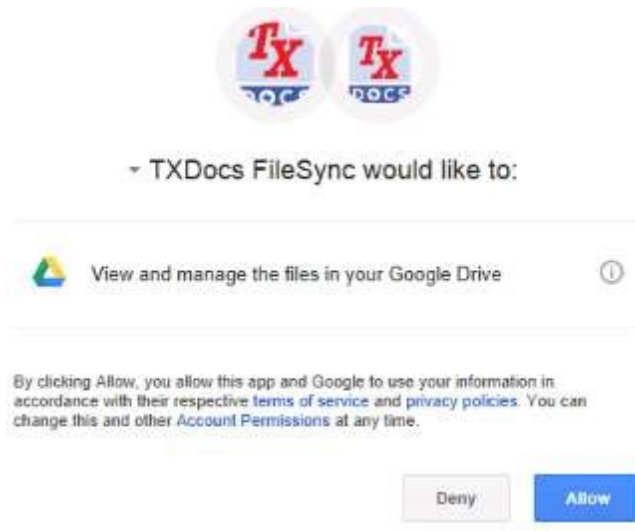


2. On the next window, select the remote drive you wish to use. (**OneDrive**, Drop Box or Google Drive) Then select OK after you have made your selection.

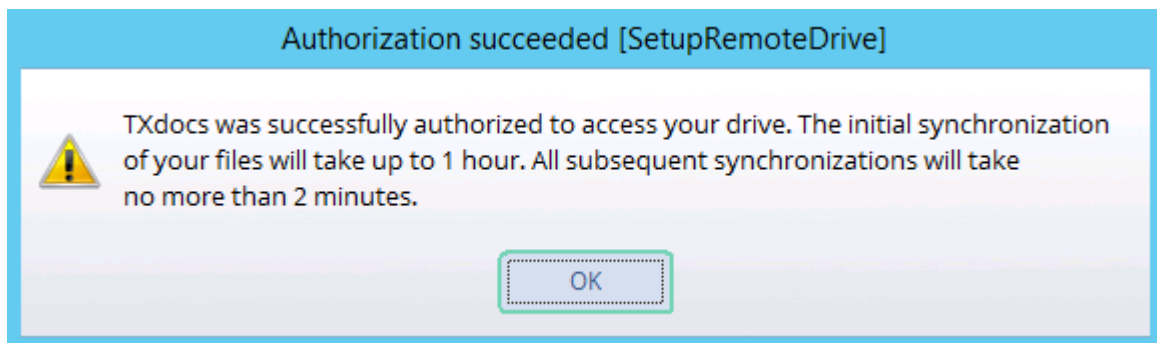


3. After you select your preferred remote drive, a window will open showing you the website sign in page for your remote drive provider.

4. If you are using OneDrive or Dropbox, after you sign in, TXDocs and your remote drive provider will automatically exchange the necessary information to authorize your TXDocs Anywhere to synch with your remote drive. If you are using Google Drive, you will see a page asking you to allow TXDocs to sync with Google Drive. Click “Allow”.



5. TXDocs is now set up to automatically synchronize any documents you assemble with your remote drive and your computer.

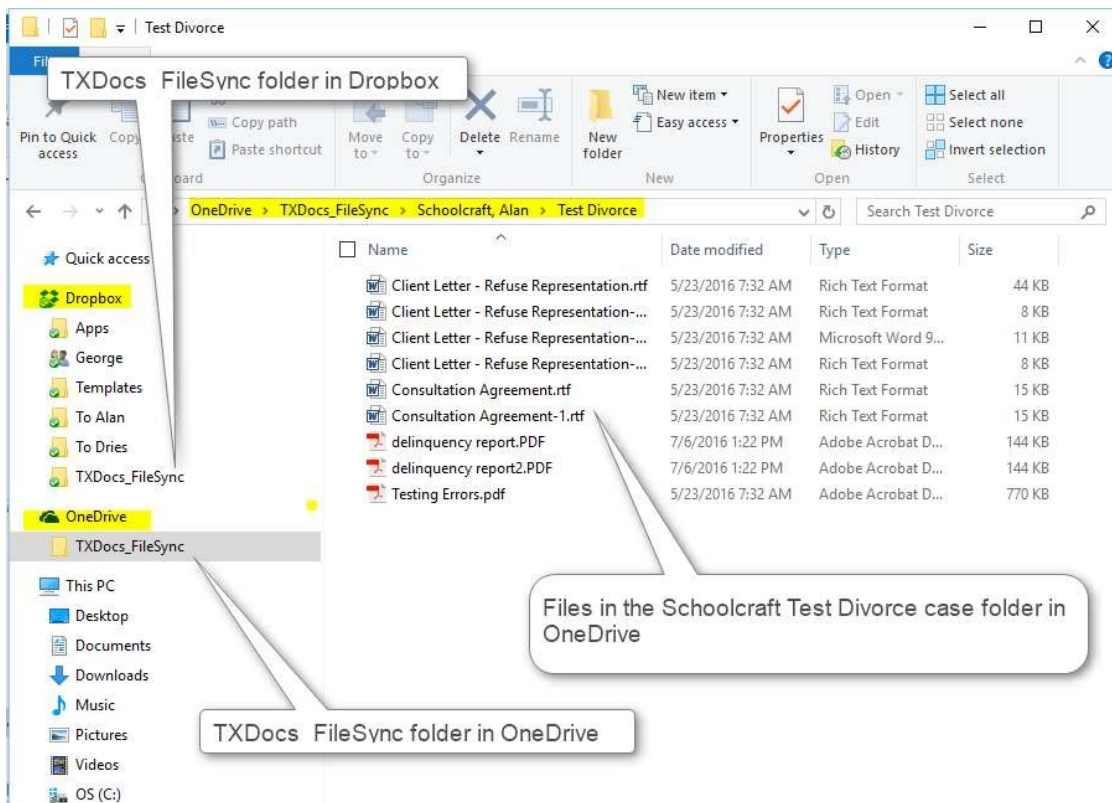


1.2 Finding Your TXDocs Documents

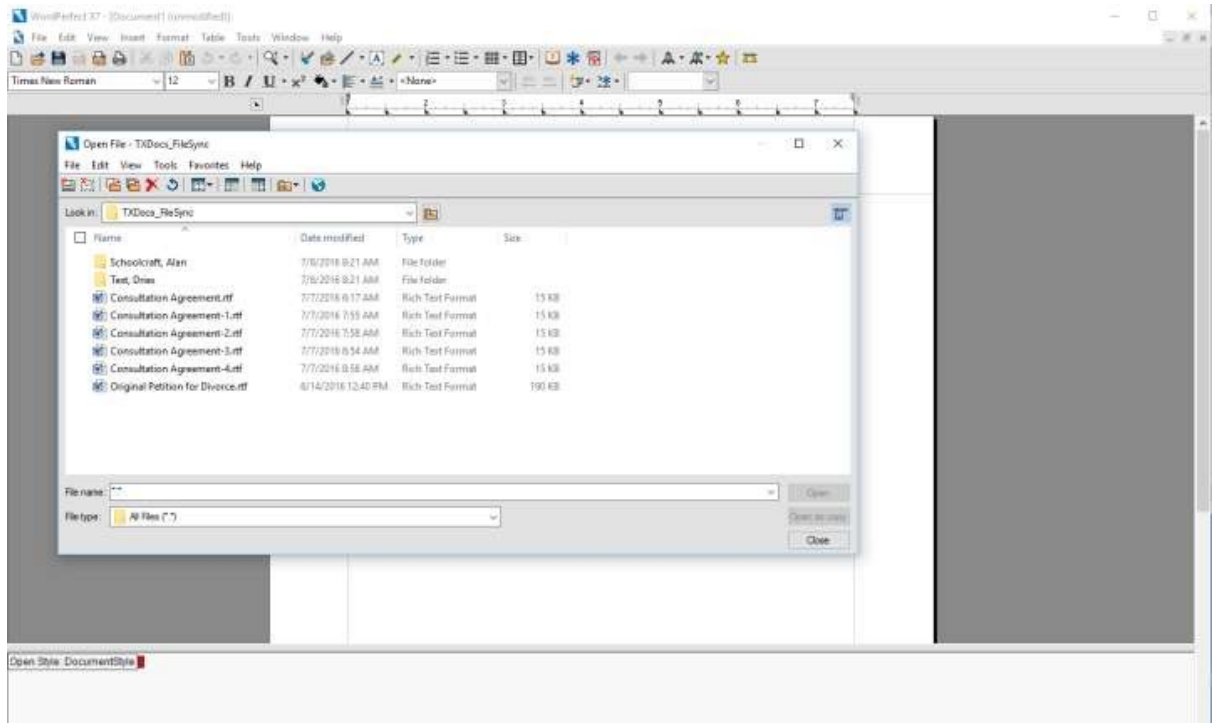
Finding Your TXDocs Documents

Your TXDocs assembled documents are automatically synced to your OneDrive, DropBox or Google Drive account. You will find them on your computer by opening File Explorer and clicking on your remote drive. There, you will see a folder named TXDocs_FileSync. Inside that folder, you will see folders for your clients and cases that contain your TXDocs assembled documents.

You can also see and open these documents just like you would any document you created in your word processor. Simply click Open and then select your remote drive and go to the folder for the client/case you want to work with. Remember, the files on your remote drive are no different from any other files on your computer. You can open, edit and save them just like any other file. The only difference is, you will open and save them on your OneDrive, Google Drive or Dropbox drive instead of in your Documents folder on your "C:" drive. For even easier access, you can create a shortcut to your remote drive on your desktop. To do this, depending on your operating system, you can either drag the remote drive from File Explorer and drop it on your desktop or right click on the remote drive and select "Send to\Desktop (create shortcut)". The screenshot below shows how OneDrive and Dropbox will appear in your File Explorer or when you open a file in Word. (Google Drive will look the same – I just don't have it installed on this computer).



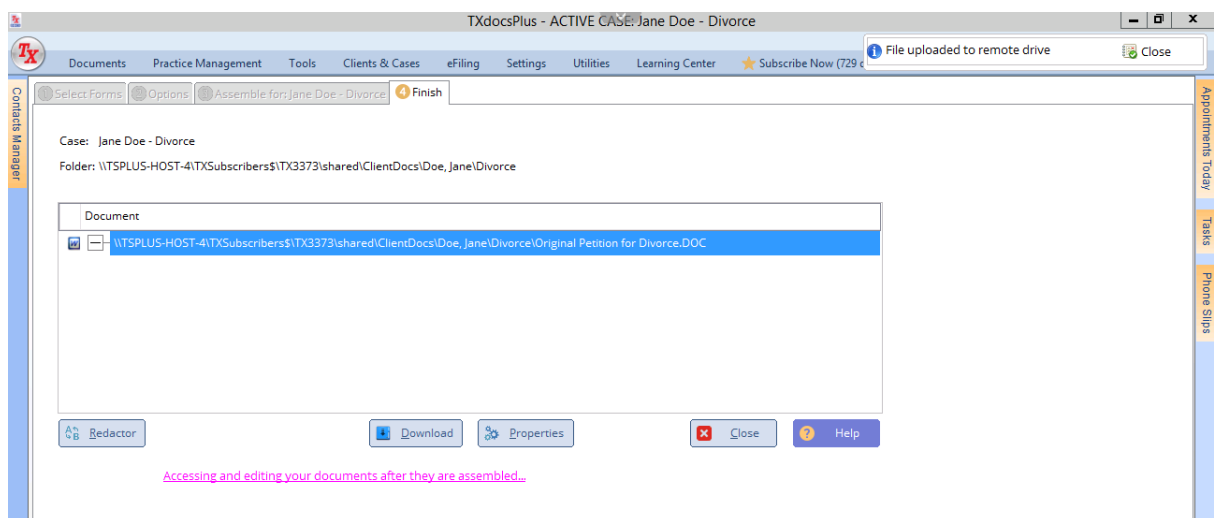
This screenshot shows how TXDocs_FileSync folder would appear when opening a file in WordPerfect.



1.3 TXDocs Automatically Sends Your Documents

TXDocs Automatically Sends Your Documents To Your Remote Drive

After assembling a document in TXDocs, the "Completed Documents" window will pop up. At about the same time, a small notification will appear in the upper right hand corner informing you that the document you just assembled has been uploaded to your remote drive. There is nothing you have to do. In a few seconds, your remote drive will sync with your computer and your assembled document will be available for editing. So, rather than clicking the Open or Download button on the Completed Documents window, just open Word or WordPerfect on and then open the document from your remote drive.



1.4 Frequently Asked Questions

Frequently Asked Questions

Q: What if I make changes to my documents on my Remote drive PC app but I do not have an internet connection?

A: You will still have access to the files saved on your Remote drive and can make any changes you need to and then as soon as your PC connects to the internet it will automatically sync with the cloud and then TXDocs Anywhere.

Q: When I assemble a document in TXDocs Anywhere, do I need to save it to my Remote drive?

A: Once you have created a document in anywhere it will automatically sync with your Remote drive and you can access it in the Remote drive under the clients' case in which the document was created.

Q: If I accidentally delete a case or document from TXDocs Anywhere or my Remote drive will it be unrecoverable.

A: The Remote Drives have a recycle bin that will allow you to restore documents for a period of time. If you do permanently delete a file from your Remote drive, it will also be deleted from your Anywhere drive but the file can always be reassembled in TXDocs.

Q: Do I still need to download files from Anywhere once my Remote drive is set up?

A: No, all files created in anywhere will automatically sync to your Remote drive in the cloud and to your PC app.

Q: I want to use MSWord/WordPerfect on my local PC and then submit those files to court using FileTime. How do I do that?

A: Save the documents as either a MSWord/WordPerfect doc and then save those files in your TXDocs_FileSync folder on your Remote drive PC app and the files will sync to TXDocs Anywhere where you can use FileTime to submit the documents. If the documents have not synced and you are in a hurry, you can speed the process up by using the "Refresh from _____" button located at the bottom of the FileTime window.(only press the button one time to trigger sync)

Q: Where in TXDocs Anywhere can I find the files that were edited on my local PC?

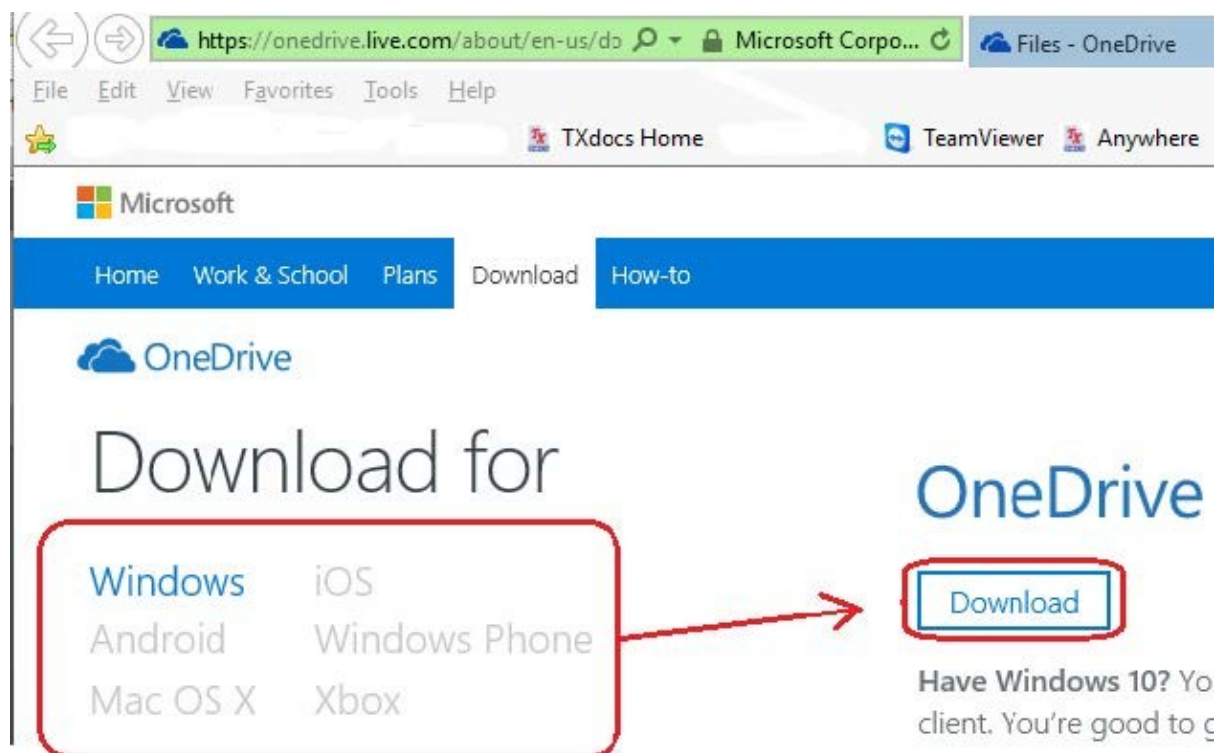
A: Files from your computer are synced to TXDocs Anywhere and put into the appropriate Client/Case folder inside the Client Documents folder.

2.1 Installing OneDrive

Installing OneDrive

To create a OneDrive account and install it on your computer, you will need to create a OneDrive account and then download and install the software on your computer. To do this, follow these steps:

1. In your internet browser, go to www.onedrive.com.
2. Click on "No account? Create one!". Follow the steps to create a OneDrive account.
3. Next, you need to download and install the OneDrive software:
4. In your internet browser, go to <https://onedrive.live.com/about/en-us/download/>
5. Select your OS (operating system) and then click "Download" . The download will start automatically.



6. Run the OneDrive install program that was downloaded.

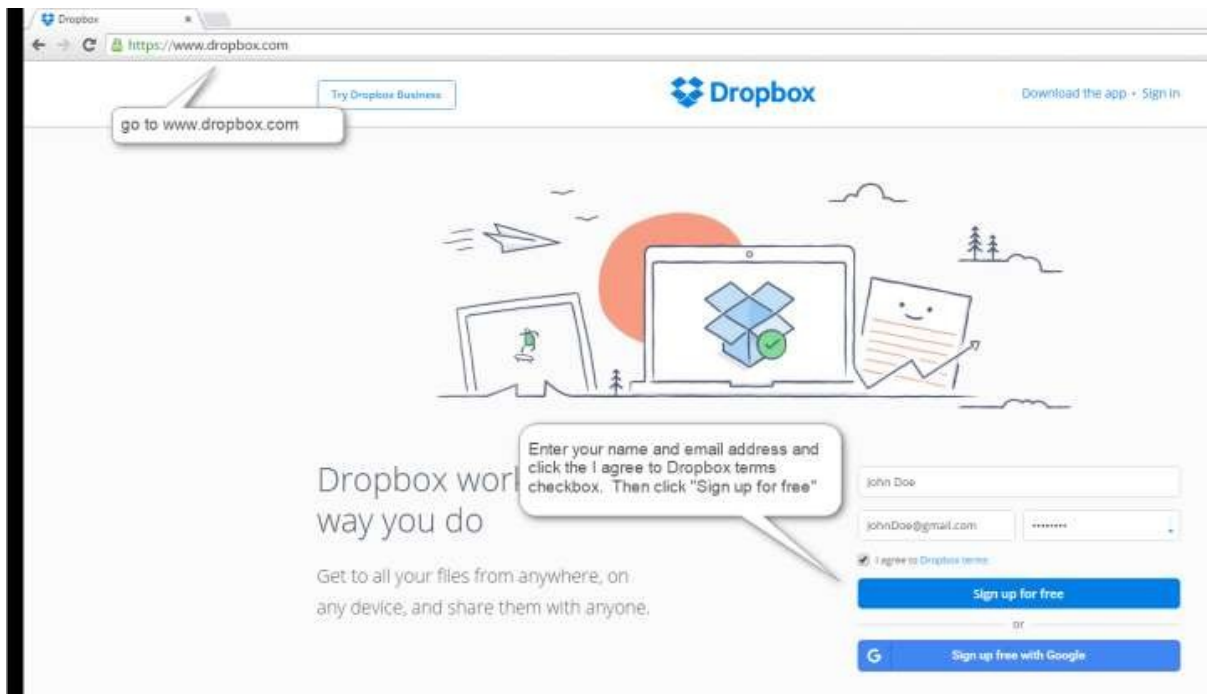
That's it!! Now return to "Connecting TXDocs To Your Remote Drive" above and finish connecting TXDocs to your new OneDrive.

2.2 Installing Dropbox

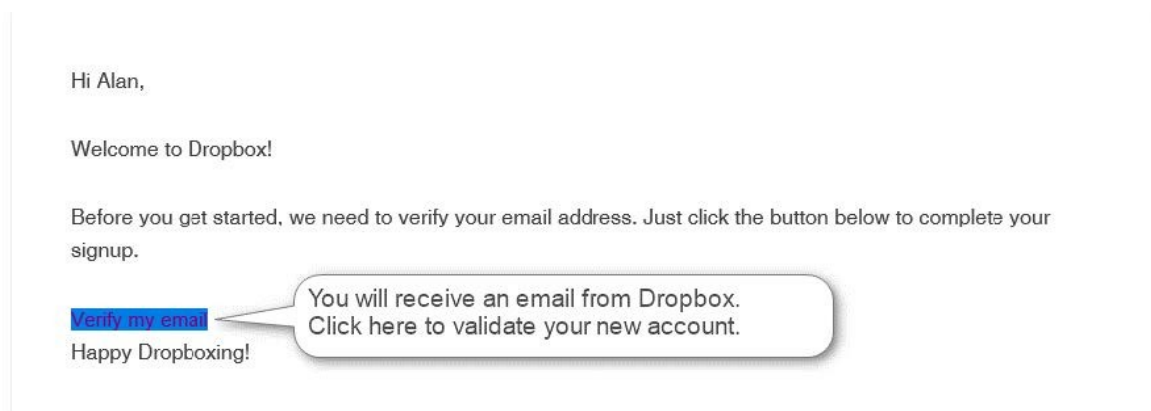
Installing DropBox

To begin installing Dropbox, open your browser to www.dropbox.com.

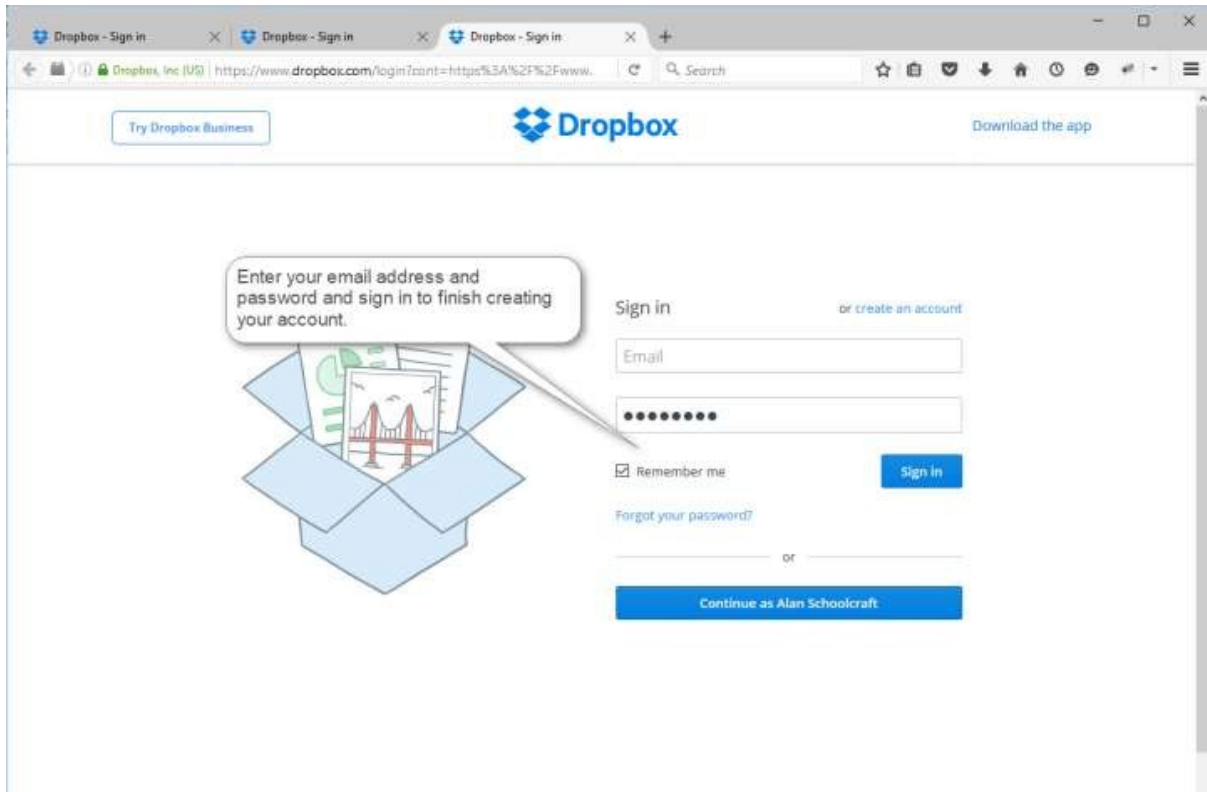
1. To create your free account, fill in your name and email address, click the checkbox agreeing to Dropbox's terms, then click "Sign up for free".



2. After you click "Sign up....", Dropbox will send you an email. You need to click on "Verify my email" to validate your new account.



3. After you verify your new account, your internet browser will open to the Dropbox sign in page. Sign in to your new account and then download the installer program.



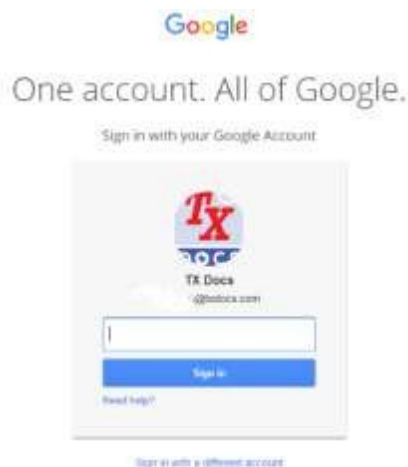
4. After you sign in, download and install the Dropbox program on your computer.

That's it!! Now return to "Connecting TXDocs To Your Remote Drive" above and finish connecting TXDocs to your new OneDrive.

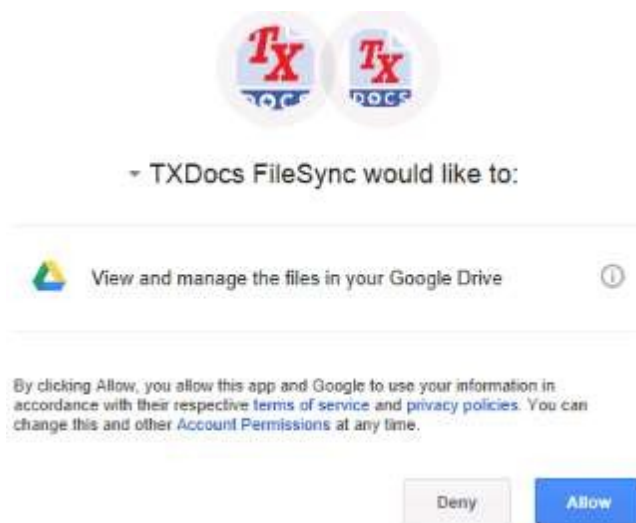
2.3 Installing Google Drive

Installing Google Drive

(1A) Google Login/Create account, after selecting Google Drive as your Remote Drive in the Setup menu in TXDocs Anywhere. Then select "Allow" so TXDocs Anywhere can sync with your Google Drive.



(1B) Select the "Get Drive for PC" link at the bottom of your browser window after logging in to Google Drive.



(1C) In File explorer you can find your PC app and access your TXDocs files

