



## **HOW TO PROPERLY CONFIGURE THE PIP PROGRAM TO ACCESS THE "PIP LIBRARY" FOLDER**

This document will explain how to properly configure your PIP program to access the "PIP\_Library" folder and resolve any errors that you are experiencing. But first, here is some background on the role of the PIP\_Library folder in the operation of the PIP program and IMPORTANT network configuration information.

### **Purpose of the "PIP Library" Folder**

The "PIP\_Library" folder is used by the PIP program to store documents related to your cases, and Document Templates used by the PIP Form Generator. The "Client" sub-folder has a folder for each of your case records. The "Template" sub-folder stores Document Templates. The original PIP\_Library folder is delivered with your PIP files after purchase. However, if necessary, you can manually create a PIP\_Library folder (and the 2 required sub-folders: CLIENT, TEMPLATE).

### **IMPORTANT: User Accounts - Authentication and Full Read/Write Access**

On each workstation that the PIP is installed, each and every user account that is using the PIP program MUST be able to authenticate to the shared network resource where the "PIP\_Library" folder is located, and MUST have full read/write access to the "PIP\_Library" folder and ALL subfolders.

In addition, each and every user account that is using the PIP program should be setup to automatically authenticate to the shared network resource where the "PIP\_Library" folder is located on system startup.

Please consult with a qualified Network Administrator to perform this configuration work.

### **How Case Folders (and Sub-folders) are added to the "PIP Library/Client" Folder**

When a new Case record is entered into the PIP, a folder is created in the "Client" sub-folder which is named according to the contents of the "Case Name" field on the Case Detail screen, and is appended with a unique 6-digit number. This occurs at the moment the Tab key is pressed after typing the case name into the "Case Name" field. Sub-folders will be created under this folder based on the default sub-folder settings that are defined in the Preferences Module (See Preferences Module > "Value List" tab > select "Case Sub Folder" from the pull down menu in the "Value List Type" field). NOTE: When you change the settings for the default Sub-Folders, the changes will be applied to all Case Name folders in the "Client" folder.

### **"PIP\_Library" Folder required for the proper operation of the Form Generator and the Document Management System (DMS)**

The PIP\_Library folder is used by both the Form Generator (Forms Module) and the Document Management System (Documentation Module > "Related Documents" tab). For

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the Form Generator to work properly, the path to the PIP\_Library folder must be set properly to allow the PIP program to access the Document Templates in the "Template" folder, and then write the document with merged case data into the appropriate Case Name folder in the "Client" folder.

The DMS provides a way to search and retrieve documents stored in Case Folders in the "PIP\_Library/Client" folder. For proper operation, the PIP program must be able to access the PIP\_Library folder through the path defined for the "active" User Account (See Step 2 below).

### How to properly configure the PIP program to access the "PIP\_Library" Folder

These are the steps required to configure the PIP program to access the "PIP\_Library" folder, and ensure that (a) the Case Folders are created properly, and (b) the Form Generator and Document Management System (DMS) work properly:

1. Locate the PIP\_Library Folder
2. Set the path to the PIP\_Library folder
3. Set the default Word Processor for the RTF File Type

These steps are explained in detail below:

1. Locate the PIP\_Library folder.

If you have a Runtime Single-User version (or the 30-Day Free Trial Version) of the PIP 2012, then the folder will be located in the HiPerSoft\_PIP\_2012\_Runtime folder. Inside this folder, you will see the PIP\_Library folder.

If you have the Network Multi-User version of the PIP 2012, the folder will be located on a shared folder/drive on your network. The location of this folder would have been determined at the time of installation with your input and permission. In many instances, a Mapped Drive will have been created at the time of installation which points to the location of the PIP\_Library folder.

#### WINDOWS

If you are on the Windows Operating System, and the installation was performed by a HiPerSoft representative, the drive will likely be mapped as the P:\ drive.

#### MAC

If you are on the Mac OS X Operating System, and the installation was performed by a HiPerSoft representative, the drive will likely be mapped as a shared folder on your server called "PIP\_Library".

You may have to search your network to find the location of the PIP\_Library folder.

2. Set the path to the PIP\_Library folder.

Now that you have confirmed the location of the PIP\_Library folder, do the following:

- (a) Navigate to the Preferences Module in the PIP and select the Staff Info Tab.
- (b) Click on the Name of the Staff Member to select their Preferences in the Right Side of the screen.
- (c) Click on the Browse button at the Bottom Right side of the screen, and you will be presented with a "Browse for Folder" dialog box. Navigate to the location of the PIP\_Library folder and select "OK" to set the File Path.

### 3. Set the default Word Processor for the RTF File Type

For the Form Generator to work properly, you must set the File Type for the Rich Text Format (RTF) file extension. RTF Document Templates are included with your basic system and are located in the "PIP\_Library/Template" folder. Almost every Word Processor can Interpret RTF File Types. However, the RTF File Type will need to be Registered with your Windows/Mac Operating System.

#### WINDOWS

To Register the RTF File Type:

- (a) Open Windows Explorer by Right Clicking on your Start button, and select "Explore".
- (b) Click on the "Tools" Menu and select "Folder Options".
- (c) Click on the "File Types" Tab at the top of the dialog box. Scroll down to the RTF File Type Extension.
- (d) If the RTF File Type Extension is not set to "Open With" your Word Processor of choice, then click on the "Change" button. Select your Word Processor from the list, or click on the Browse button to locate the executable file for your Word Processor. Once your Word Processor has been selected, click on "OK" in all dialog boxes until you are returned to the original Windows Explorer window.

#### MAC

To Register the RTF File Type:

- (a) Open the Finder.
- (b) Navigate to the folder PIP\_Library/Templates. This folder contains the Document Templates that come with the basic PIP 2012 system.
- (c) Right click on any of the files, and select "Get Info" from the Sub-Menu.
- (d) In the "Open With" section, select your Word Processor from the list, or click on "Other" at the bottom to locate the Application File for your Word Processor.
- (e) Make sure that you select the "Change All" button. This is required to assign all the RTF document templates to the Word Processor you have selected. Once your Word Processor has been selected, exit out of all dialog boxes.