

fssMacroSuite-Installation Guide

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fssMacroSuite

Installation Guide

by Roger Ellis

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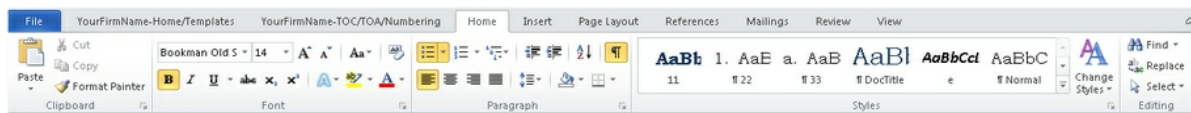
1 Introduction



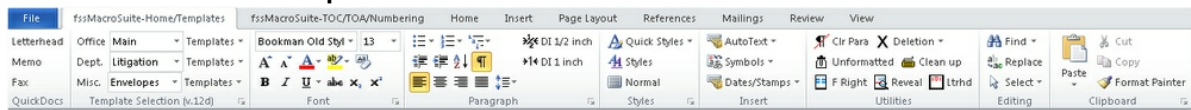
Welcome to the fssMacroSuite program. The fssMacroSuite ribbon reorganizes Ribbon buttons and adds new Groups and Buttons in order to give the user a full suite of productivity macros.

The **fssMacroSuite-Home/Templates Tab** (which can be renamed to reflect your firm name) is designed as a replacement for the standard Word 2007/2010 **Home Tab**. We do not remove the standard **Home Tab**, it occurs as the third tab in the ribbon interface. However, you will find just about every group of commands on the **fssMacroSuite Home/Templates Tab** plus the **QuickDocs** buttons, the **Template Selection** and the **Utilities** groups.

Word 2010 Home Tab:



fssMacroSuite-Home/Templates Tab:



As you can see from the two images, both tabs contain

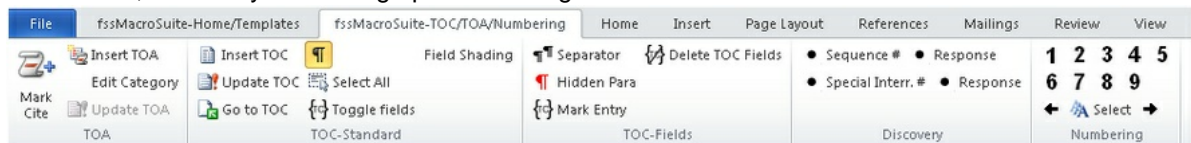
Font, Paragraph, Styles, Editing, Clipboard

but the **fssMacroSuite-Home/Templates tab** adds **QuickDocs**, **Template Selection**, **Insert**, **Utilities**

Many office users constantly have to create letters, fax covers, memos or other standard documents. The **QuickDocs** Group gives each office user the ability to define the "hot" three quick documents that they need. The label and the template are definable.

With the **Template Selection** tab, you can easily design a folder structure to hold your firm's templates. You have three definable categories (by default they are named: Office, Dept., Misc.) and you can create an unlimited number of choices and templates to go in those categories.

The second tab of the fssMacroSuite contains tools for working with Tables of Authorities (TOA), Table of Contents, Discovery and Paragraph Numbering.



Use the fssMacroSuite_UserGuide.pdf for information about each option on the fssMacroSuite ribbon.

So, again, welcome to the fssMacroSuite with tools to make your use of the Word Ribbon interface more efficient and productive.

Note: Our demo samples use the legendary law firm of Dewey, Cheatham and Howe. We recently learned that the genesis of Dewey, Cheatham and Howe was a Three Stooges comedy routine. No offense is intended.

Roger Ellis
President
Fee Simple Software

2 Installation overview

We recommend that a copy of all templates used by fssMacroSuite be kept on each user's C:\Program Files\Fss\fssMacroSuite folder. This avoids contention and increases load speed.

The fssMacroSuite installer will create the standard folders for our Demo setup. That folder structure should be modified to match the requirements of your firm.

Templates should be added to the template folders. Once the program has been build up with enough templates and the [letterhead list](#) has been filled in you should use Group Policies or RoboCopy to set up a method for copying the folder/templates structure to each station.

3 Obtain a Client ID before you begin

The fssMacroSuite Ribbon and templates will not work without being registered. Registration for testing is free.

The first time that you run Word after installing the demo files you will be prompted for a Client ID.

If you are doing a test of fssMacroSuite, we can set a time period for you to test. Please contact Fee Simple Software at 205-823-7439 and provide contact information for your firm. We will be happy to set up a demo and will not call you unless you give us permission.

If you are working with an authorized dealer, you can ask them to obtain a Client ID for you.

4 Run the installer

Verify that Microsoft Word 2007/2010 is not running; also verify that no instances of WINWORD.exe are running in the background.

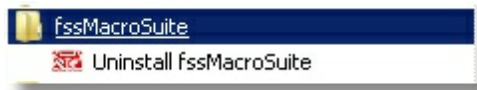
Press Ctrl+Shift+Esc.

Check the Processes tab to see if WINWORD.exe is active.

If Word is not currently running but WINWORD.exe exists in the Processes tab, click End Process and close the Task Manager.

If you have downloaded the fssMacroSuite installer from <http://www.feesimple.net> then double click it to run the install.

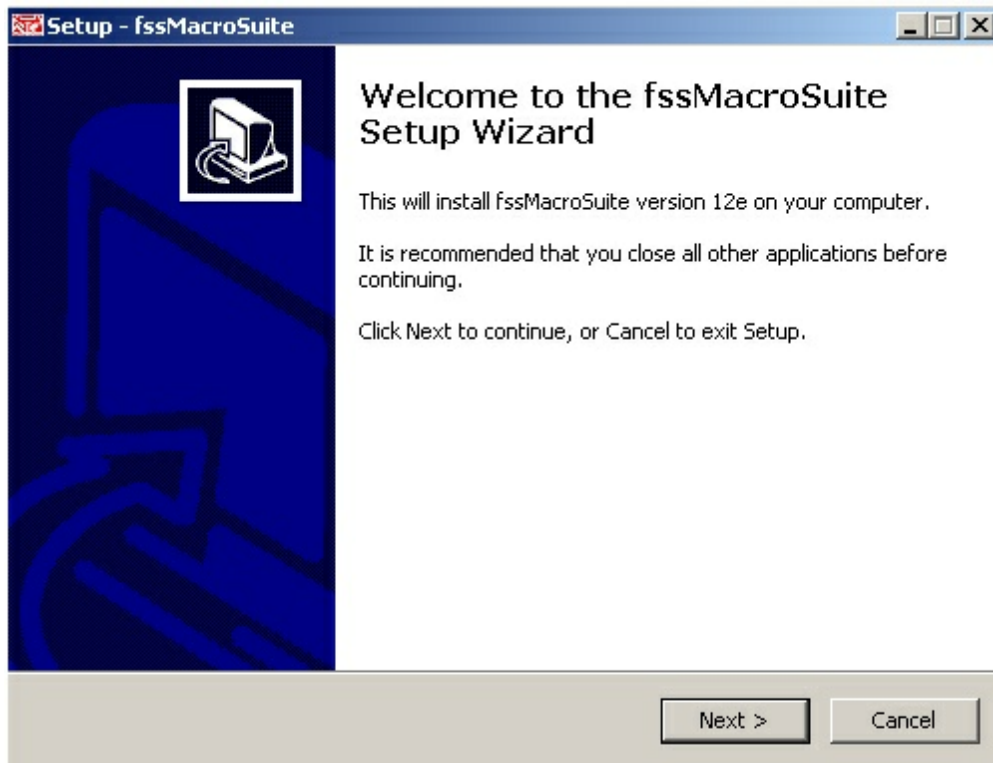
The installer will create a program group called fssMacroSuite and create an uninstall selection there.



The install creates a series of folders on "C:\Program Files\fss". This location must not change or there will be problems with code references. The following dialogs are shown by the installer.

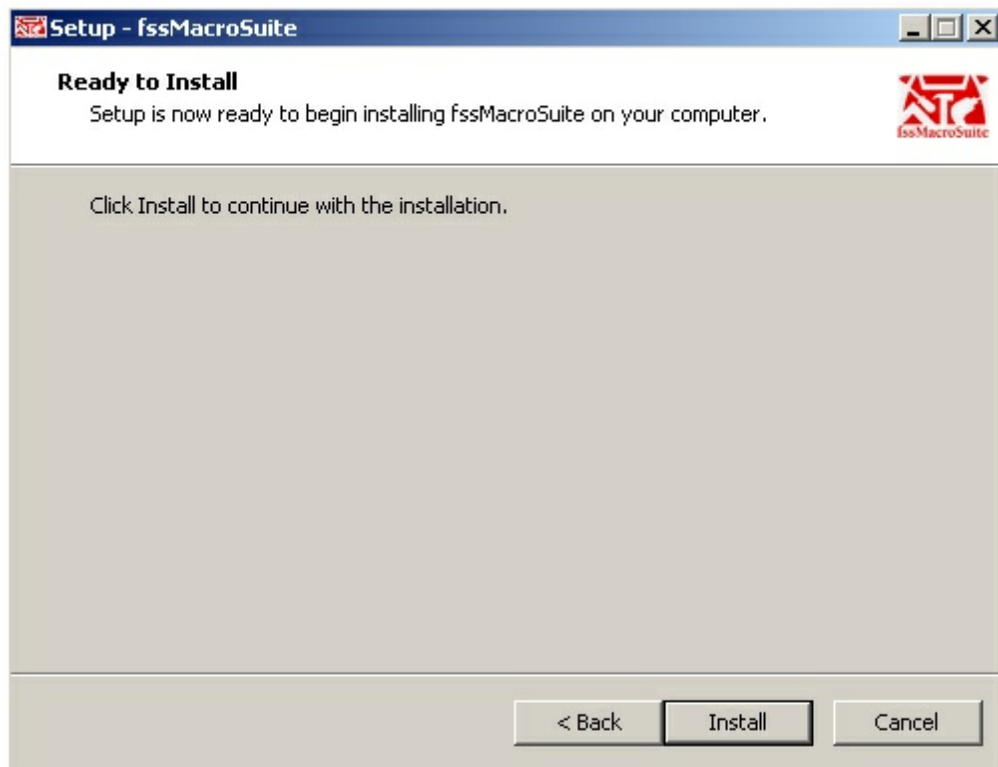
4.1 First install dialog (be sure to close Word)

The installer will copy a template to your global Word startup folder. For this reason, be sure to have Word closed before you start the install.



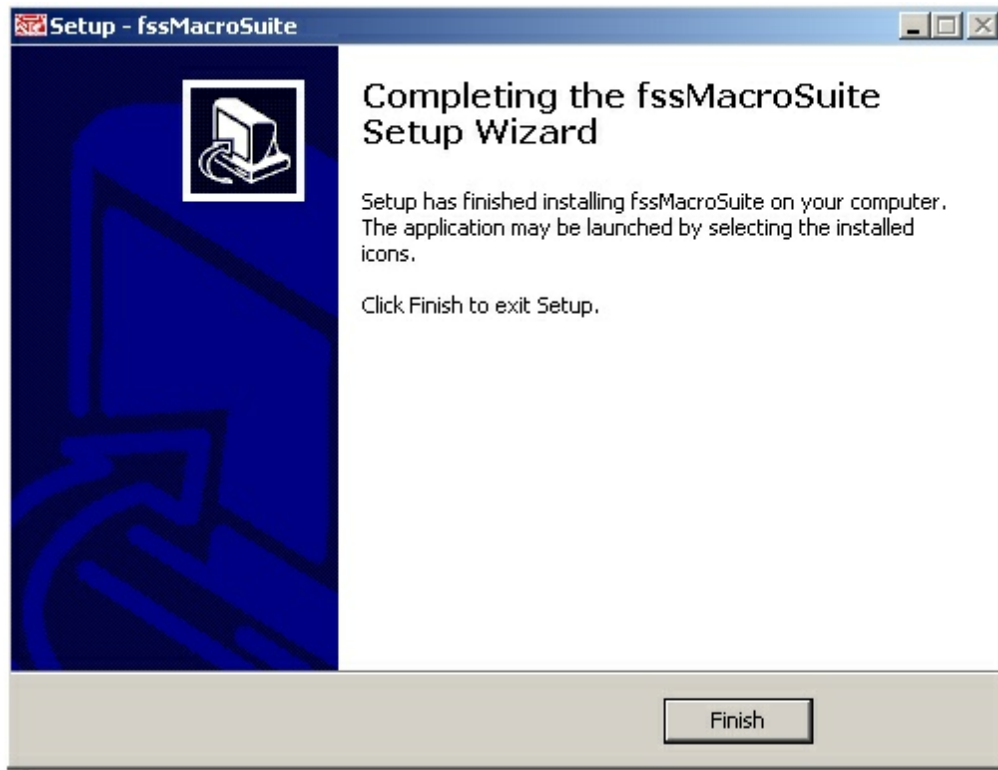
4.2 Second install dialog

Since the location of the demo file folders must be "C:\Program Files\fss" there is no dialog to select the install location.

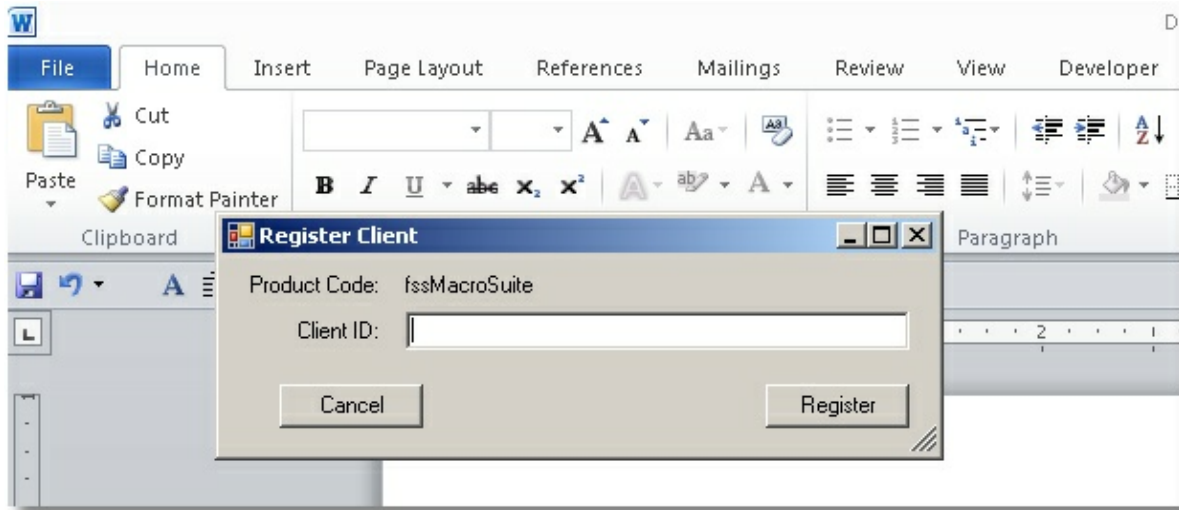


4.3 Final install dialog

The installer is finished.



4.4 Start Word and Enter your Client ID

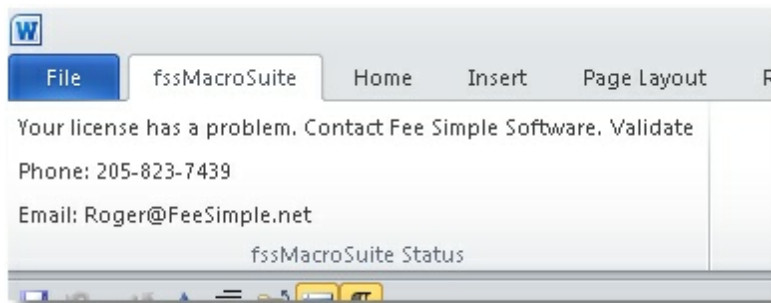


Enter your Client ID.

4.4.1 If you did not obtain a Client ID

If you start Word before you have obtained a Client ID, you will be prompted 4 times in succession for the Client ID, then Word will load and the Ribbon will display this fssMacroSuite Status tab. You may obtain a Client ID and then click the Validate button to enter the ID.

You may uninstall fssMacroSuite and reinstall it at a later time. There is no problem in repeated installs and uninstalls since all that happens primarily is file copying.



ere.

5 Word Versions supported (2007 and 2010)

The Ribbon interface was first added to Word in the 2007 Edition. fssMacroSuite will work with Word 2007 and Word 2010. Since we connect to Outlook for Address List information with our special templates for Letterhead, Memo and Fax Cover Letters, you must be sure to use a version of the "Main" template that has been compiled for your version of Microsoft Office.

Word will resolve the code reference to Outlook as long as you start with a copy of the fssMacroSuite_Main.dotx "Main" template that has been saved in a compiled state for Office

2007.

If you open the "Main" template in Word 2010 and then copy it to an Office 2007 station you may create a problem. So always use the "Main" template that is shipped from us and is compiled into Office 2007 format when you post a copy of the "Main" template for copy to other stations.

If you are totally Word 2007 or totally Word 2010, this will not be a problem.

We set a **code reference** to the **fssMacroSuite_main.dotm** template. Because if this we **require** that you place the "main" template in the **global Word startup folder**. See [fssMacroSuite_Main](#)

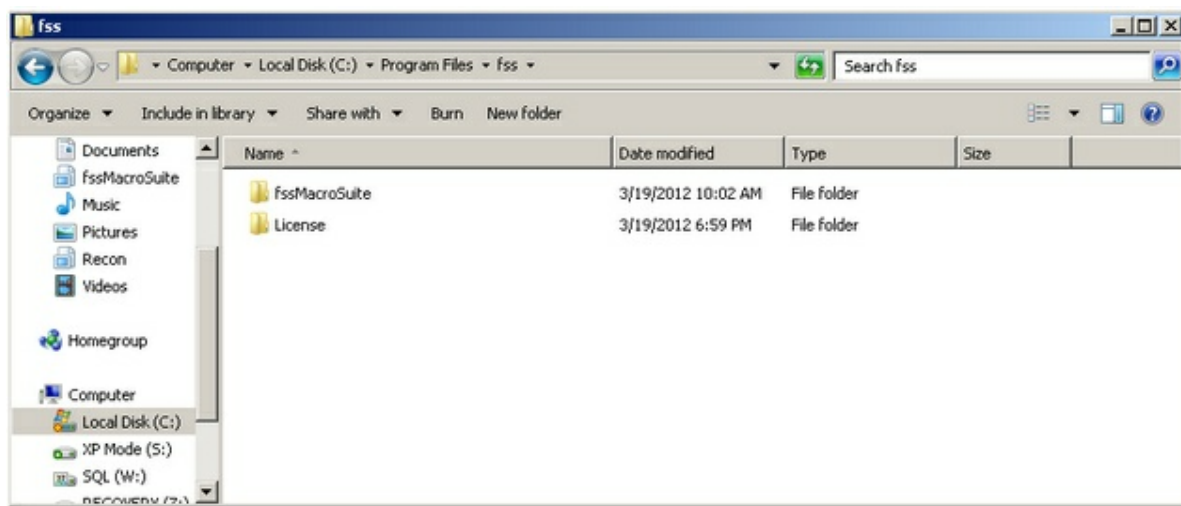
During the normal Demo install, we place a copy of the **fssMacroSuite_main.dotx** template in the global Word Startup folder for you.

6 The fssMacroSuite folder structure

Each folder that is created during the install is explained below.

6.1 Root Folder "C:\Program Files\fss"

The root folder for our install is **c:\Program Files\fss**

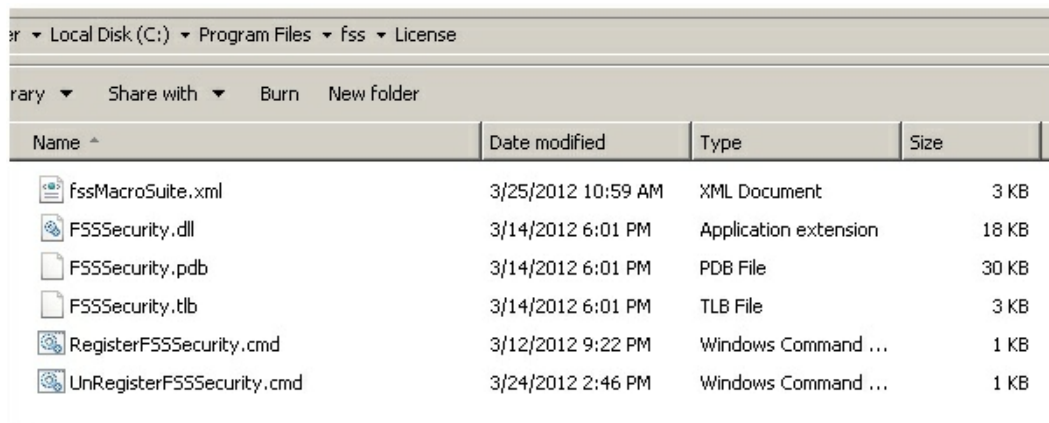


Two folders are created below **c:\Program Files\fss**:

They are **fssMacroSuite** and **License**.

6.2 License Folder "C:\Program Files\fss\License"

The license folder contains the following files:



Name ^	Date modified	Type	Size
fssMacroSuite.xml	3/25/2012 10:59 AM	XML Document	3 KB
FSSSecurity.dll	3/14/2012 6:01 PM	Application extension	18 KB
FSSSecurity.pdb	3/14/2012 6:01 PM	PDB File	30 KB
FSSSecurity.tlb	3/14/2012 6:01 PM	TLB File	3 KB
RegisterFSSSecurity.cmd	3/12/2012 9:22 PM	Windows Command ...	1 KB
UnRegisterFSSSecurity.cmd	3/24/2012 2:46 PM	Windows Command ...	1 KB

The file **RegisterFSSSecurity.cmd** will register the **FSSSecurity.dll** if the file was not registered during the install. If you ran our installer, the file was registered.

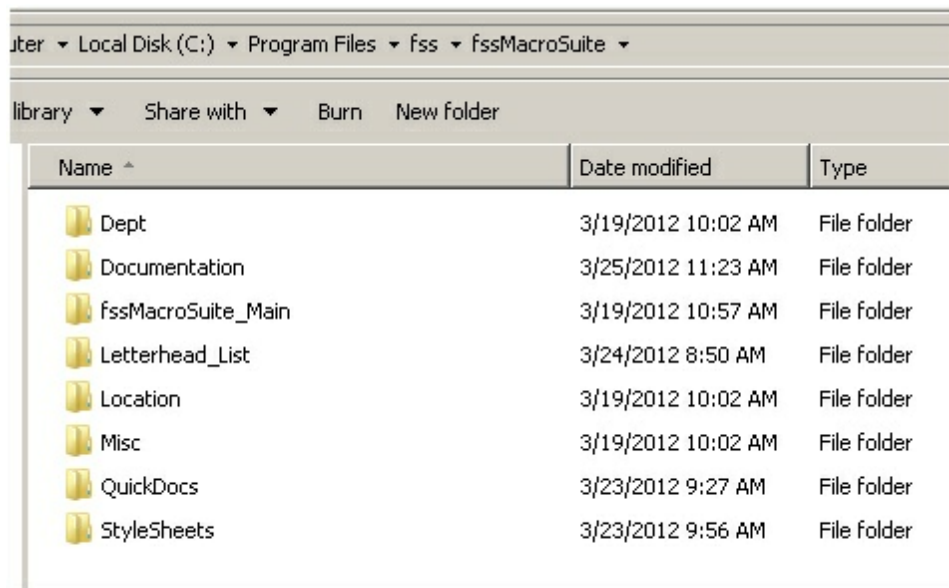
FSSSecurity.pdb and **FSSSecurity.tlb** are support file for **FSSSecurity.dll**.

The file **UnRegisterFSSSecurity.cmd** will unregister the **FSSSecurity.dll**.

The file **fssMacroSuite.xml** contains encrypted values that are used by the **FSSSecurity.dll**. It is created after registration and if deleted will be recreated by registering again.

You may register the same computer multiple times with no issue of duplication in the security database.

6.3 Base Program Folder "C:\Program Files\fss\fssMacroSuite"



Name ^	Date modified	Type
Dept	3/19/2012 10:02 AM	File folder
Documentation	3/25/2012 11:23 AM	File folder
fssMacroSuite_Main	3/19/2012 10:57 AM	File folder
Letterhead_List	3/24/2012 8:50 AM	File folder
Location	3/19/2012 10:02 AM	File folder
Misc	3/19/2012 10:02 AM	File folder
QuickDocs	3/23/2012 9:27 AM	File folder
StyleSheets	3/23/2012 9:56 AM	File folder

All of these seven folders are created during the install. **The names must not change.**

Four of the folders are used as template repositories (Dept, Misc, Location, QuickDocs).

Each folder will be discussed below:

6.3.1 Alias the three Template root folders

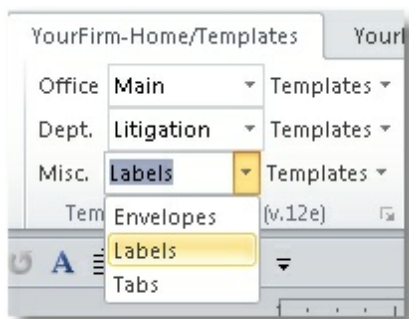
Label your category folders then select the "Default" folders for your category folders. The three folders must be named "Location", "Department", and "Misc" but can be labeled as needed.

"Location" folder Label	Office	Main	Browse ...
"Department" folder Label	Dept.	Litigation	Browse ...
"Miscellaneous" folder label	Misc.	Envelopes	Browse ...

There are three "hard-coded" top level root folders that you can use to categorize your firm's templates. You may not change the folder name but you may alias it to some other name as shown on the configuration dialog above. For more information see the [Configuration](#) section of this Install Guide.

Once you set up a folder structure for each of the three category folders, you copy the appropriate templates into those folders. There is no limit on the number of folders or the number of templates in a folder. Practically, you would not want to have more than 20 to 25 templates per sub-category so that all templates are listed in the dynamic menu list and scrolling is not necessary.

NOTE: Due to limitations with control over Ribbon labels, we suggest that you use short names for your three template folder labels and that they be somewhat the same length. See image below:

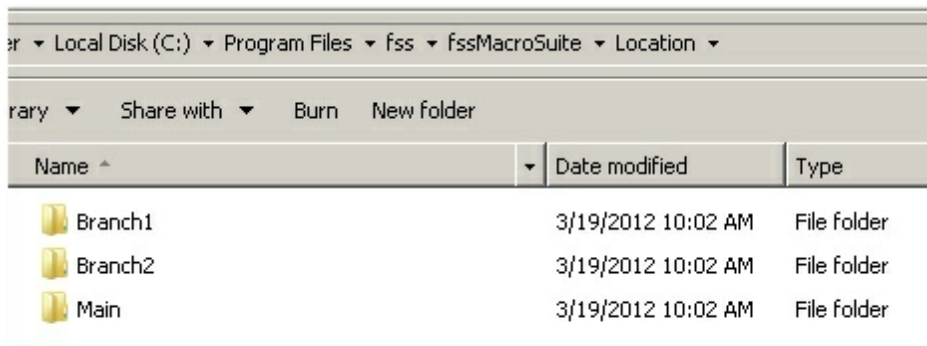


The Category folders were named Office (Location Folder), Dept. (Dept folder) and Misc. (Misc folder). In the dropdown list of sub-category folders for Misc. you see Labels, Envelopes, and Tabs. So use as brief a name that you can that serves the purpose. This is to conserve Ribbon space.

The names of the templates themselves can be more expansive. If you wish to sequence the names in a particular order, you will need to prefix them with a letter or number to sequence them, otherwise they will appear in the list in alphabetical order.

6.3.1.1 Location folder (Templates root folder)

Many law firms have branch offices, so the "Location" folder is often used for templates that could vary by office location.



The screenshot shows a Windows Explorer window with the address bar set to 'Local Disk (C:) > Program Files > fss > fssMacroSuite > Location'. The toolbar includes 'Library', 'Share with', 'Burn', and 'New folder'. The main pane displays a table of folders:

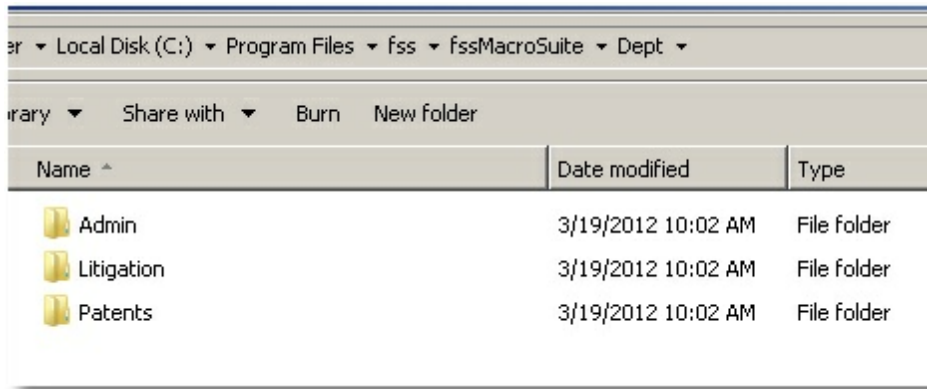
Name ^	Date modified	Type
Branch1	3/19/2012 10:02 AM	File folder
Branch2	3/19/2012 10:02 AM	File folder
Main	3/19/2012 10:02 AM	File folder

If your firm has locations in Chicago, New York, and Los Angeles, you might name the three folders under Location accordingly.

Note: If you don't have branch offices, then you may alias the Location folder for another purpose, like Practice.

6.3.1.2 Dept folder (Templates root folder)

The Dept templates root folder was designed for sub-folders for practice areas or departments in a law firm. If you do not have multiple offices then you could use the Location folder for Practice and the Dept folder for Departments.

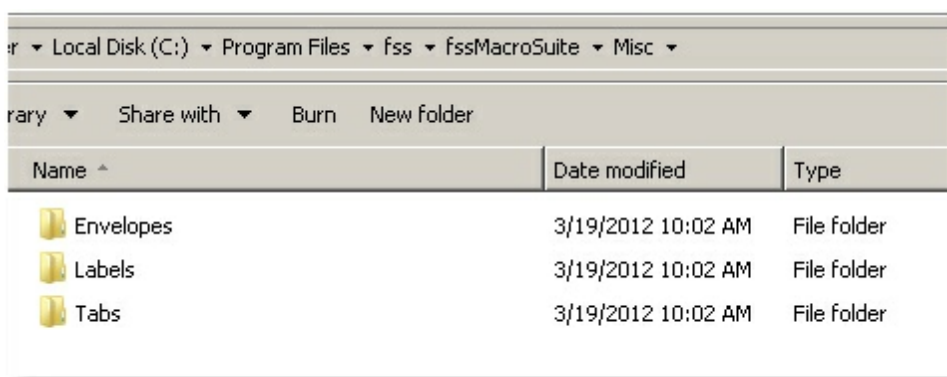


The screenshot shows a Windows Explorer window with the address bar set to 'Local Disk (C:) > Program Files > fss > fssMacroSuite > Dept'. The toolbar includes 'Library', 'Share with', 'Burn', and 'New folder'. The main pane displays a table of folders:

Name ^	Date modified	Type
Admin	3/19/2012 10:02 AM	File folder
Litigation	3/19/2012 10:02 AM	File folder
Patents	3/19/2012 10:02 AM	File folder

6.3.1.3 Misc folder (Templates root folder)

The Misc templates root folder was designed to be a repository for templates that are somewhat universal in nature and that fit in the other categories.



6.3.2 Documentation folder

The fssMacroSuite User Guide (**fssMacroSuite_UserGuide.pdf**) and Installation Guide (**fssMacroSuite_InstallGuide.pdf**) are copied here during the install.

6.3.3 fssMacroSuite_Main

During the install, a copy of fssMacroSuite_main.dotm was placed in the appropriate Word Startup folder based on your Windows Version. If you are doing a **manual install then follow these guidelines**:

We set a **code reference** to the fssMacroSuite_main.dotm template. Because if this we **require** that you place the "main" template in the **global Word startup folder**. See the table below:

Go to: C:\Program Files\fss\fssMacroSuite\fssMacroSuite_Main\

Copy fssMacroSuite_Main.dotm to the Word global startup folder.

Windows 7	Word 2007	C:\Program Files (x86)\Microsoft Office\Office12\STARTUP
	Word 2010	C:\Program Files (x86)\Microsoft Office\Office14\STARTUP
Windows XP	Word 2007	C:\Program Files\Microsoft Office\Office12\STARTUP
	Word 2010	C:\Program Files\Microsoft Office\Office14\STARTUP

Note: The global Word startup folder is usually included in Word's trusted locations. Many firms may use Roaming Profiles. There is nothing user specific about the fssMacroSuite_main.dotm template. Any user specific configuration choices that are made in the Configuration step are stored in ini files by user name and details about those files follow below in [User specific INI files](#).

6.3.4 Letterhead_List

This is the location for the document named **fssMacroSuite_Letterhead_list.docx**. This is a fixed location. Neither the file name nor the folder name may be changed. For more information see the configuration section [Letterhead List](#) below.

6.3.5 QuickDocs

There are three buttons that can be defined at each computer station to open templates. We use the term "QuickDocs" for the Ribbon Group that contains the three buttons. You may place more than three templates in this location if certain users will want a different combination of three templates. Typically

the three buttons are labeled and configured for Letterhead, Fax Cover and Memo. See [Configuration](#) for more details.

6.3.6 StyleSheets

This is a fixed folder name and it must not be changed. Our Numbering routine makes use of the style sheets that are stored here. See the User Guide for more information about the paragraph numbering ribbon group.

6.4 User specific INI files

The fssMacroSuite uses ini files to control user settings. These ini files are saved in AppData under the User's name.

For a Windows 7 user the path would be:

C:\Users**someusername**\AppData\Roaming\fssMacroSuite

For an Windows XP user the path would be:

C:\Documents and Settings**someusername**\Application Data\fssMacroSuite

If your firm uses roaming profiles then each user will maintain their settings.

The ini files are named **fssMS_Local.ini** and **fssMS_Global.ini**. In testing, ini files were faster than registry entries, so they were utilized.

fssMS_Global.ini contains settings that are typically consistent from station to station in a network.

```
[config]
StartFolder=C:\Program files\fss\fssMacroSuite\
Dept_Default=Litigation
Loc_Default=Main
Misc_Default=Envelopes
Home_Tab_Default=YourFirmName-Home/Templates
TOC_Tab_Default=YourFirmName-TOC/TOA/Numbering
Location_Label=Office
Dept_Label=Dept.
Misc_Label=Misc.
```

fssMS_Local.ini contains settings that can be variable by user, such as who is the default letterhead attorney for this station and what QuickDocs are assigned for this station.

```
[Attorney]
Key=Cheatham, Will I.
One=Cheatham, Will I.
Two=Will I. Cheatham
Three=Insincerely
Four=WICheatham@dch-law.com
Five=(212) 444-3335
Six=WIC
Seven=Attorney-at-law
Eight=Will Cheatham
[QuickDocs]
QDLabel1=Letterhead
QuickLetterhead=fssMS_Demo_Letterhead_12e.dotm
QDLabel2=Memo
QuickMemo=fssMS_Demo_Memo_12e.dotm
```

```
QDLabel13=Fax
QuickFax=fssMs_Demo_Fax_Cover_12e.dotm
```

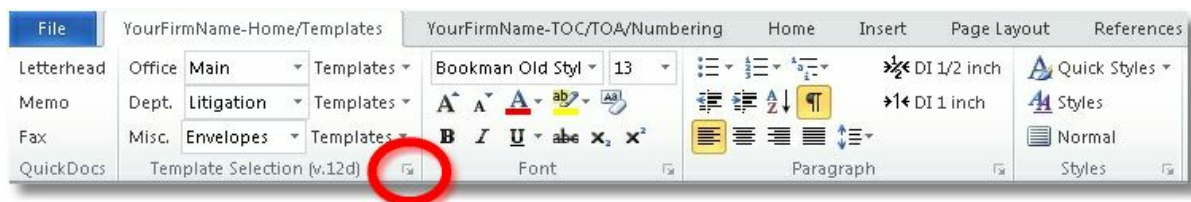
7 Configuration

If you wish to test fssMacroSuite with your own list of attorneys and templates, you will need to do some configuration. Contact Fee Simple Software for information on training and template creation/modification.

For demo purposes, very little configuration will be necessary. See the User Guide for more information.

7.1 User by User Configuration

Start Microsoft Word 2007/2010. In the Template Selection group, click the dialog launcher icon:



The following configuration dialog displays

Configure the fssMacroSuite Template Folder Path and Default Template Categories

First time setup: You must first use the browse button to browse to the templates "parent" folder. If you do not know the location of your templates "parent folder" ask someone in your support staff.

Templates path:

Label your category folders then select the "Default" folders for your category folders. The three folders must be named "Location", "Department", and "Misc" but can be labeled as needed.

"Location" folder Label:

"Department" folder Label:

"Miscellaneous" folder label:

You must click on the "Refresh" button to see choices for the Default Attorney.

Default Attorney for Letterhead Templates:

Label each Quickdoc on the left and then browse and select the Quickdoc template.

Quickdocs Label 1:

Quickdocs Label 2:

Quickdocs Label 3:

Finally change the name of your SMS Home Template tab and TOC/TOA tabs if you wish.

Your name for the Home/Templates Tab:

Your name for the Table of Contents/Table of Authorities/Numbering Tab:

Be sure to hit "Save Configuration Settings" and then "Close". Validate Security is rarely used.

Under **Template path**, click the Browse button and select the Macro Suite top level "root" folder. With a normal install the folder will be named: **c:\Program Files\fss\fssMacroSuite**.

Note: You can add or rename the folders under the **Department**, **Location**, and **Miscellaneous** folders

Under **Default folder for the Department Templates**, select the appropriate folder, e.g., Admin.

Under **Default folder for Location templates**, select the appropriate folder, e.g., Main. You may wish to rename the "Main" folder to the name of the city of your primary office.

Under **Default folder the Miscellaneous Templates**, select the appropriate folder, e.g., Misc.

Under **Default Attorney for Letterhead Templates**, select an attorney specific to that particular user.

Optional: You may change the first tab in the ribbon to display the firm name instead of Macro Suite-Home/Templates:

Under **"Your name for the Home/Templates Tab"** enter the [Firm Abbreviation] in front of the word "Templates."

Under “**Your name for the Table of Contents/Table of Authorities/Numbering Tab**” enter the [Firm Abbreviation] in front of the phrase “TOC/ToA/Numbering.”

Browse to the **Quick Docs** section. **Select and Label each Quick Doc in turn.** Short labels are recommended since the label can take up a lot of Ribbon space.

Click “**Save Configuration Settings.**”

Click Close.

Exit and restart Word.

7.1.1 Configuration INI files

Note: The values that you set in the configuration dialog are **automatically** stored in ini files in these locations, depending on your version of Windows:

Windows 7	Word 2007	C:\Users\YourUserName\AppData\Roaming\fssMacroSuite\
	Word 2010	C:\Users\YourUserName\AppData\Roaming\fssMacroSuite\
Windows XP	Word 2007	C:\Documents and Settings\yourusername\Application Data\fssMacroSuite
	Word 2010	C:\Documents and Settings\yourusername\Application Data\fssMacroSuite

7.2 Letterhead List

fssMacroSuite provides templates that connect with Outlook to provide “**To**” data.

The Letterhead List is a Word document that contains a table of staff names for the “**From**” data.

Typically the letterhead list will be populated with all firm attorneys. Some firms also include the firm's staff members. To do this, they use column Eight and put in the staff member's name and a soft return followed by the staff member's title.

To update staff names in the letterhead list, please follow these steps:

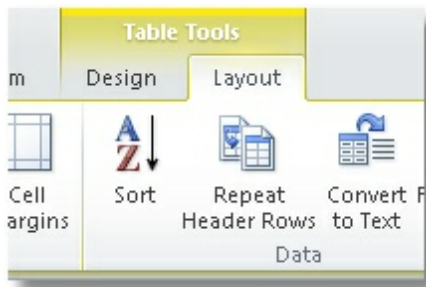
1. Open: **C:\Program Files\fss\fssMacroSuite\Letterhead_List\fssMacroSuite_Letterhead_list.docx**

fssMacroSuite-Staff Letterhead Listing

bkmFrom_One1 to bkmFrom_One4	bkmFrom_Two1 to bkmFrom_Two4	bkmFrom_Three1 to bkmFrom_Three4	bkmFrom_Four1 to bkmFrom_Four4	bkmFrom_Five1 to bkmFrom_Five4	bkmFrom_Six1 to bkmFrom_Six4	bkmFrom_Seven1 to bkmFrom_Seven4	bkmFrom_Eight1 to bkmFrom_Eight4	bkmFrom_Nine1 to bkmFrom_Nine4	bkmFrom_Ten1 to bkmFrom_Ten4
Last,First Mandatory	Signature Mandatory	Closing Mandatory	Email Mandatory	Direct Dial Phone Mandatory	Initials Mandatory	Title Optional	Letterhead Name Optional	Optional	Optional
Cheatham, Will I.	Will I. Cheatham	Insincerely	WICheatham@dc-law.com	(212) 444-3335	WIC	Attorney-at-law	Will Cheatham		

Dew ey, John R.	John Dew ey	Sincerely	JRDew ey@dch- law .com	(212) 444- 3334	JRD	Attorney- at-law	John R. Dew ey		
How e, Andy K.	Andy How e	Warmly	AKHow e@ dch- law .com	(212) 444- 3336	AKH	Attorney- at-law	Andy K. How e		

2. Input the names, titles, and preferred letter closings. You should consult with your fssMacroSuite contact about the use of the columns. Those fields marked "mandatory" must be used as directed in order to work with the associated Letterhead/Memo/Fax templates.
3. Use the Sort tool on the first column in the table to sort by Last Name, First Name. Note: The sort button only appears when you are in a table. It appears in the Table Tools tab as shown below.



4. Save and close fssMacroSuite_Letterhead_list.docx.

8 Versioning

fssMacroSuite uses a simple two digit year plus a letter to create a version string. Every attempt will be made to keep templates and future versions of the fssMacroSuite compatible. The beginning version that you must have to attain backward compatibility is version 12e. All letterhead, memo and fax templates that were created prior to version 12e should be updated.

The version of fssMacroSuite is shown on the ribbon group **Template Selection** in parenthesis as seen on the screen shot below. If your version of fssMacroSuite doesn't show a version number at this location, then it predates the 12e version and you should obtain an update.

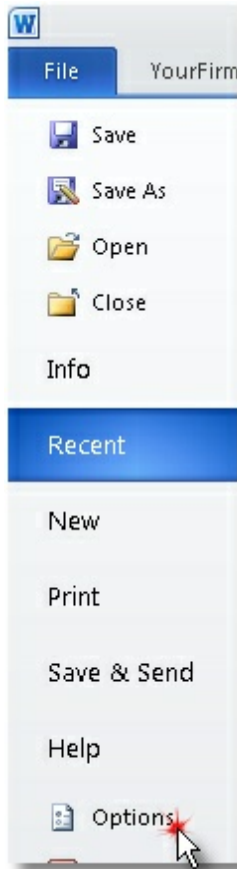


9 Best Practices for Deployment

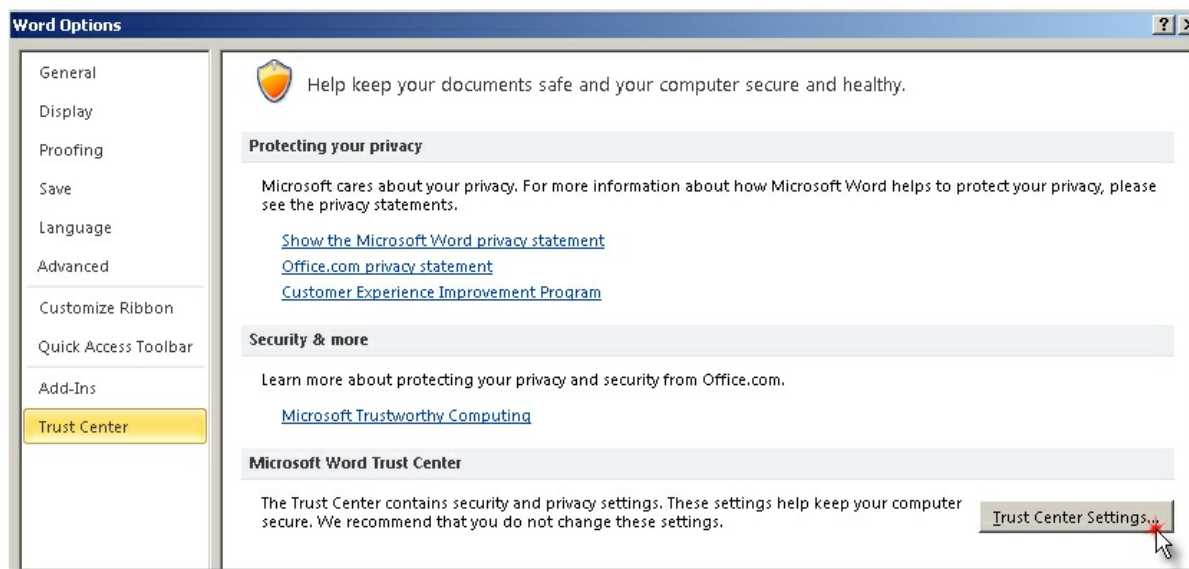
See details below:

9.1 Make the fssMacroSuite Root folder a Trusted Location for Word

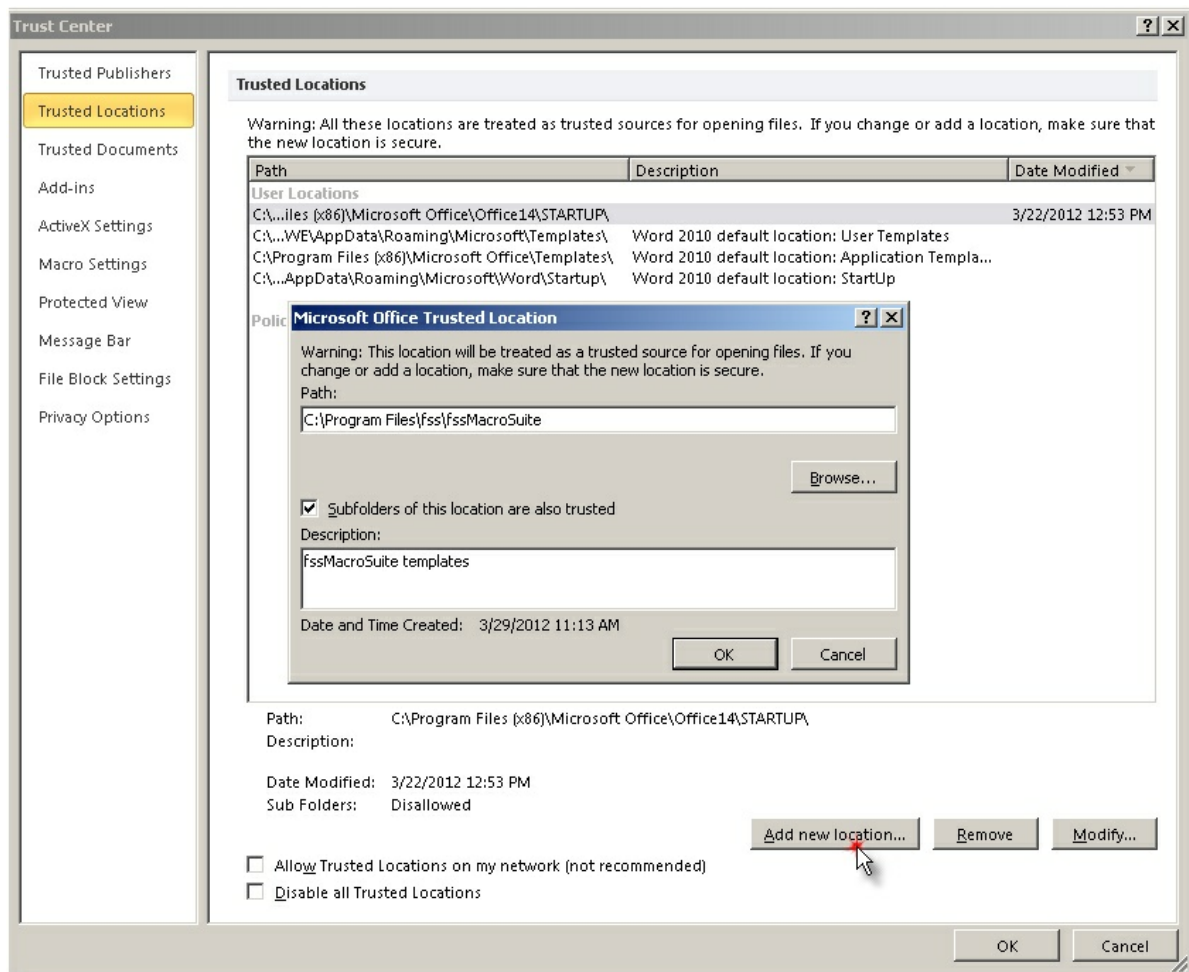
Open Word and click on the File Menu, then select Options



Pick Trust Center on the Left hand pane, then click the Trust Center Settings button



Click on Add New Location and then fill in the dialog. Be sure to save your settings.



9.2 Create a Server Drive Copy of the Templates

Because of contention for shared files and for speed considerations, we recommend that all fssMacroSuite template files be stored on each user's c: drive.

To make administration easy, maintain a copy of the templates and folder structure on a server drive and use Group Policies or the free utility from Microsoft, Robocopy, to copy down changes to each user during Windows startup.

See details below:

9.2.1 Use Group Policies to Copy Server Templates to each Network Computer

Use Group policies to copy fssMacroSuite templates to each network user. (to be developed)

9.2.2 Use RoboCopy to Copy Server Templates to each Network Computer

If your firm is not familiar with Group Policies, then a good alternative is to use the free file copy utility named Robocopy.

Robocopy.exe is part of a large group of utilities provide by Microsoft.

<http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=17657>

Documentation for Robocopy can be found at this site.

[http://technet.microsoft.com/en-us/library/cc733145\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc733145(WS.10).aspx)

These are the switches that we recommend, where D:\D_Source is your server drive folder that contains your fssMacroSuite folders that you want copied to each user's station and C:\C_Target most likely would be our standard C:\Program Files\fss\fssMacroSuite.

robocopy "D:\D_Source" "C:\C_Target" *.* /s /w:0 /r:1 /log:C:\mRoboCopyLogfile.txt

/s = Copies subdirectories. Note that this option excludes empty directories

/w:0 = Specifies the wait time between retries, in seconds. The default value of *N* is 30 (wait time 30 seconds).

/r:1 = Specifies the number of retries on failed copies. The default value of *N* is 1,000,000 (one million retries).

/log: = Writes the status output to the log file (overwrites the existing log file).

After you have created a robocopy .cmd file and installed robocopy on the user's station, place .cmd file in Windows Startup folder. Each time you start Windows Robocopy will copy any changed files from the server to the user's fssMacroSuite folder. All that you will need to do to disseminate changes is to place new templates in the server directory.

For more information about the Windows Startup folder see this article: <http://www.sevenforums.com/tutorials/1401-startup-programs-change.html>

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