

## Suggestions on designing and duplicating your WorkCenter Database

You have already completed the first database management flash video named: **Database Management - #1 Database Overview - Tips in managing your WorkCenter databases.** That flash video gave you tips on database management and also areas in the database you will want to personalize. Now that you have customized your database you can duplicate this database for other users or for your own personal use.

We at vForms see two major areas where WorkCenter users will want to use these approaches to enhance their use of WorkCenter and also to assist company owners in quality and compliance controls with their employees using WorkCenter.

As we explained in the first video on Database Management, the default directory for your database file is: C:\Program Files\WorkCenter. Your database is named: WorkCenter.mdb. To duplicate the database, follow these instructions:

1. Close down your WorkCenter software program
2. Go to the directory where you WorkCenter.mdb files are located and copy and paste the file to your desktop.
3. Right click on the file and rename the file to meet your needs.
4. If you wish to make multiple copies, repeat the same process and place all of the new databases initially in a folder on your computer.

Once that is completed, you now have two or more databases that are identical in all aspects including Contact List Manger Lists, Action Plans, Reports and Library forms including any graphics added to these documents.

**Tip #1:** For a single user wanting multiple databases: Make sure the databases are named differently and have an appropriate name to identify their specific use. Copy this or these new databases to a computer folder of your choosing. We suggest a folder that your system backs up frequently to safeguard the data in case of computer failure or virus issues.

Open WorkCenter and then click on FILE and the OPEN. Go to the computer folders and open the databases one at a time. Once you have opened all databases, click on FILE and REOPEN. You will now notice all the databases that have been opened are showing in the menu screen. If you have named your database appropriately, you now can use this procedure to select the desired database you wish to open.

As you can see by this screen view, when we click on FILE and REOPEN, we have accessed several different databases with our WorkCenter software. You will also note across the top of WorkCenter, you will see the name of the database you have open at the top of the screen view.

**CAUTION: PLEASE KEEP IN MIND THAT WORKCENTER WILL OPEN THE LAST DATABASE YOU HAD OPENED WHEN YOU CLOSED DOWN THE WORKCENTER DATABASE. MAKE SURE YOU ARE IN THE CORRECT DATABASE WHEN YOU PERFORM ANY FUNCTIONS USING WORKCENTER.**

**Tip #2:** Company owners purchasing multiple copies of WorkCenter for their employee use. We suggest you follow the same procedure outlined in Tip #1 with a couple of modifications.

1. We would recommend that you name databases for specific loan officers, processors and other employees using their names. For example, lets say you have Tom and Mary and both are loan

officers. We would assign their database names as: Tom-WorkCenter.mdb and Mary-WorkCenter.mdb.

We would do that for the ease of identifying their database when you as the manager or supervisor wish to open that database and review activity and progress for your employees or team members.

2. We would also recommend that you place their individual databases in folders on your network system that only they and you or your supervisors can access based on administrative privileges. This procedure will keep other employees from accessing the individual databases and also allow you to open the database anytime you choose. You then have the ability to only sync in LOS data into their database based on filtering the files inside WorkCenter.
3. If you then open each of the databases using your copy of WorkCenter explained in Tip #1 above, you can easily gain access to their database by clicking on FILE and then REOPEN. Choose the employee name from the list and you will not need to concern yourself with where the file is located. You or your supervisor can open the database and review your employees progress at your discretion even if the employee has the database open.