Transferring Your Caseworx Install to a New Computer

After upgrading or replacing your computer, it's easy to transfer your case files to the new machine with a few simple steps.

1. Begin by installing a new copy of Caseworx on the new computer using the installer. The newest version can be found at https://jklsoftware.com/products/caseworx/ under the "Downloads" section. Once installed, start Caseworx on the new computer and perform any updates that are found.

2. On the old computer, start Caseworx and log in. Perform a "Master Backup" from the Tools->Backup/Restore menu. This will create a .cbp package with all of your case data and imaging. You can place the backup package on a USB drive or network share that can will be accessed from the new computer to restore. If the "Master Backup" menu item is grayed out, be sure you are logged into your Caseworx account.
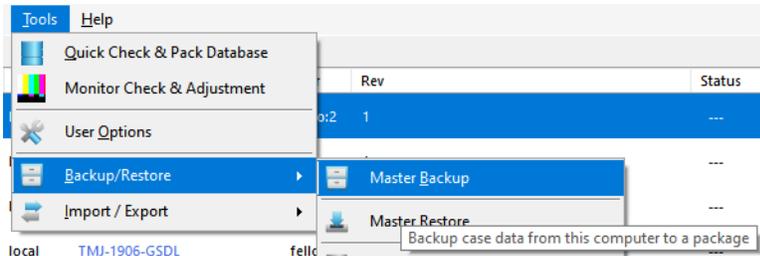
3. From the new computer with the fully installed version of Caseworx, start Caseworx, but DO NOT log in. Simply close the login screen. If you are already logged in, Log Out from the "Program->Logout of Account" menu.
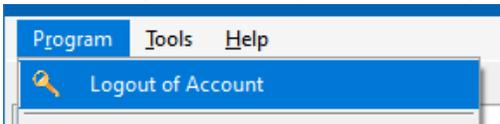
4. Then, access the "Master Restore" from the Tools->Backup/Restore menu. Click the "Browse" button and select the .cbp package you exported previously from the old computer. Check the "No backup of previous data" option as this is a new install and we don't need to save the default data on the new computer. Click "Start Restore" to begin restoring.
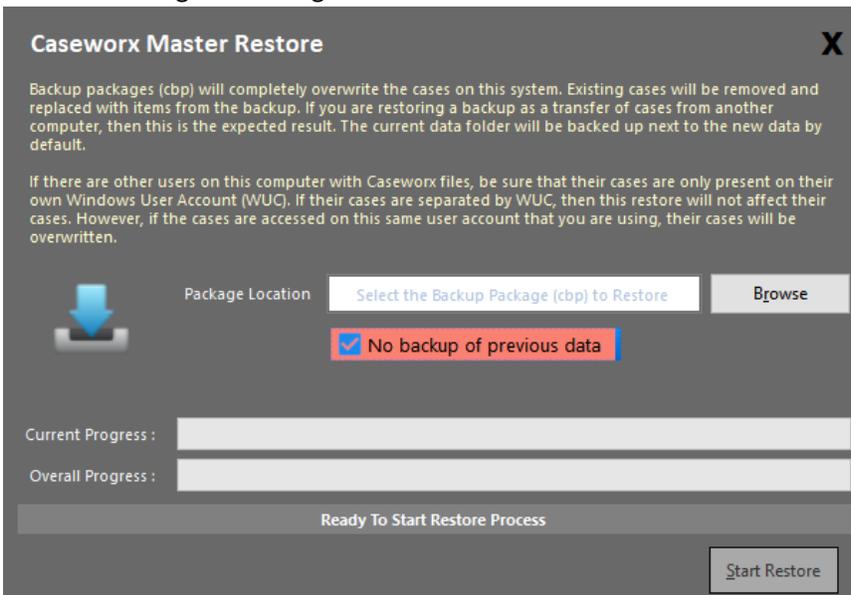
5. Once the data has been restored, close and restart Caseworx. Upon restarting, you will see all data and settings on the new computer as they were on your old machine.

6. NOTE: If your computer isn't set up for daily/weekly full-disk backups, this is a quick and convenient method to backing up the data of your Caseworx install!