

Client Loading Instructions For ProHelp® EPM, Release 7.5

This application note describes the steps necessary to install the ProHelp® EPM, Release 7.5, client software on a workstation computer. It presumes that the ProHelp® EPM server software has already been installed and that the directory “prohelp” has been shared on the server computer.

The ProHelp® EPM client software is typically loaded on a personal computer running Microsoft Windows Vista or Microsoft Windows XP. Limited support may exist for Microsoft Windows 98.

1. Overview Steps

When you install the ProHelp® EPM client software on a personal computer, the following must be done:

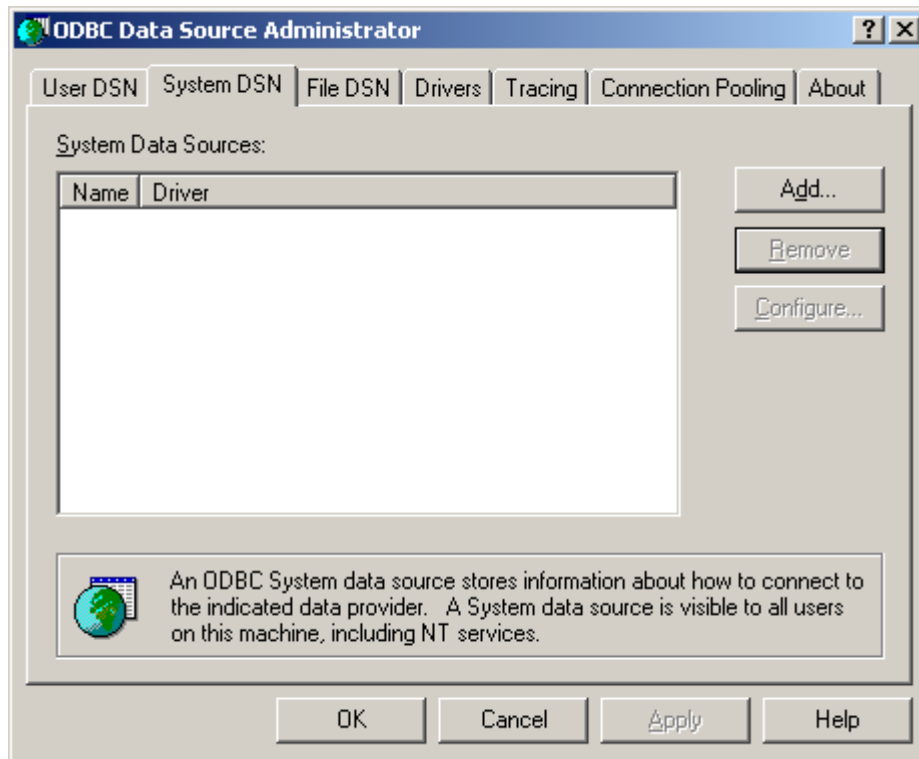
- Create an ODBC DSN that points to the server’s database. This ODBC DSN is commonly named **MATTEC_PROHELP**.
- Decide whether you will perform a **Remote Client** installation, a **Local Client** installation, or a combination of the two (on different computers). Contact the Mattec Customer Service Department for additional information.
- Install the ProHelp® EPM client software. To do this, run **..\Client\Setup.exe** on the installation CD.
- If you performed a **Local Client** installation, configure the software using System Names Edit.
- If this is the first time that the software has been installed on this computer, you should install the runtime license for Crystal Reports. To do this, run **..\Crystal Reports XI\Setup.exe** on the installation CD.

The following sections will simply describe these steps in more detail.

2. Create an ODBC Data Source

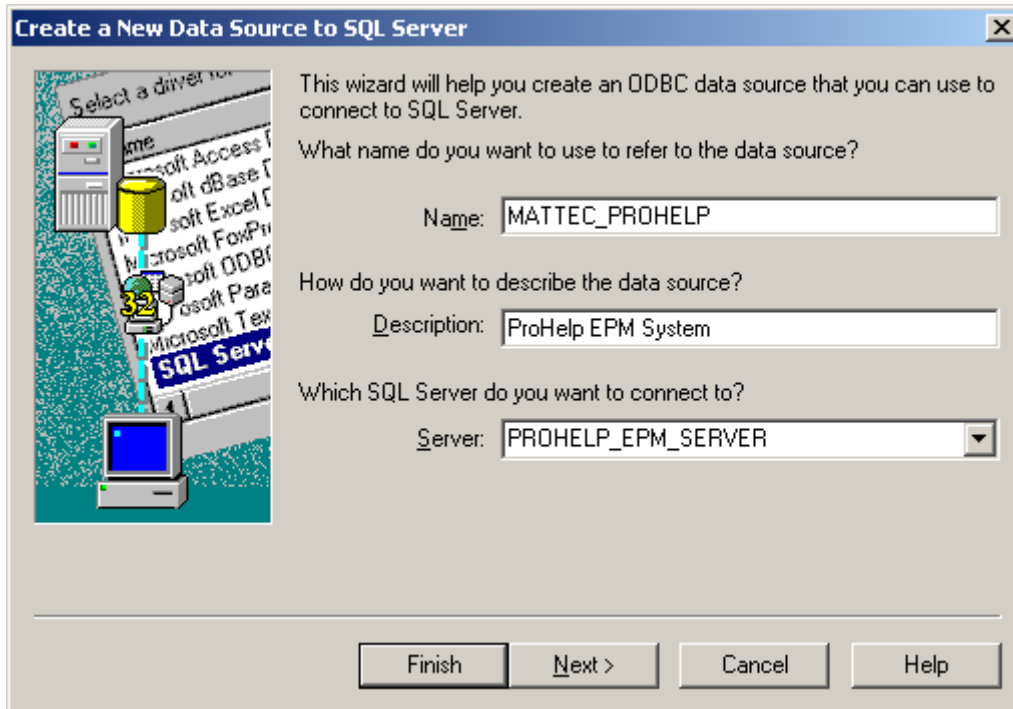
It is necessary to create an ODBC Data Source for the database on the server computer. To do this, follow these steps:

- Log in to the client computer as the user who will run ProHelp® EPM.
- Click on the Microsoft Windows **Start Menu**, click **Settings**, and select **Control Panel**.
- In the **Control Panel** window, double-click the **Administrative Tools** icon.
- In the **Administrative Tools** window, double-click the **Data Sources (ODBC)** icon. The **ODBC Data Source Administrator** window will be displayed.

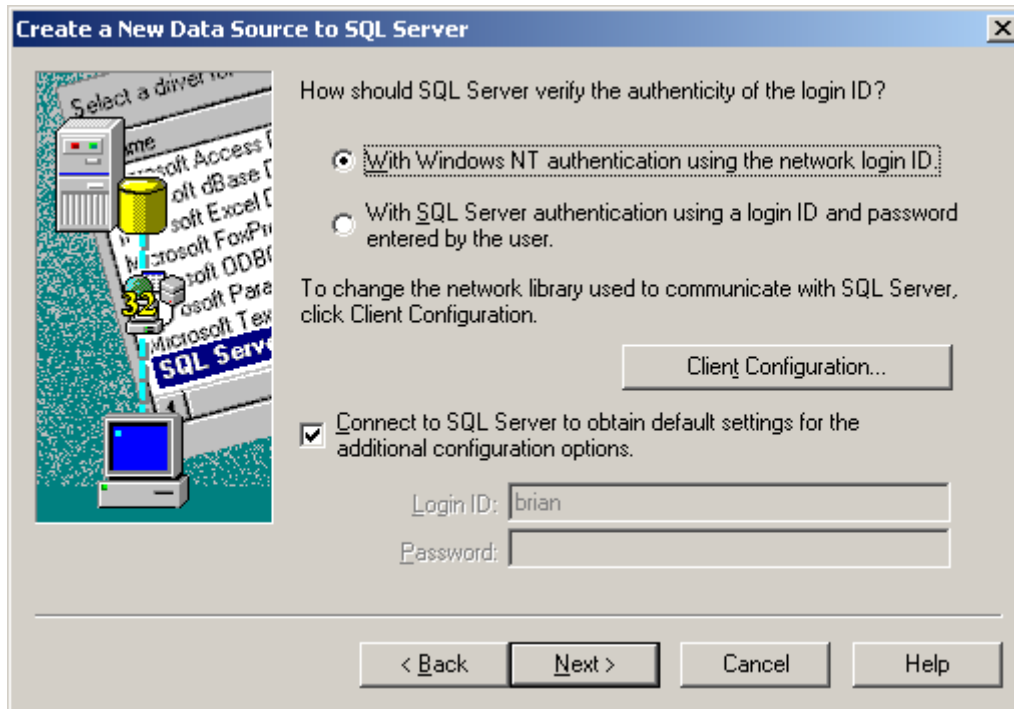


- In the **ODBC Data Source Administrator**, select the **system DSN** tab. Press the **Add...** button.
- When prompted to **select a driver for which you want to set up a data source**, select **SQL Server**. Press **Finish**.

- When prompted, specify *MATTEC_PROHELP*, or an appropriate name, as the **Name**. This name can be the same as, or different from, the actual database name on the server computer. Enter an appropriate **Description**, and specify the server computer's name as the **Server**. Press **Next**.

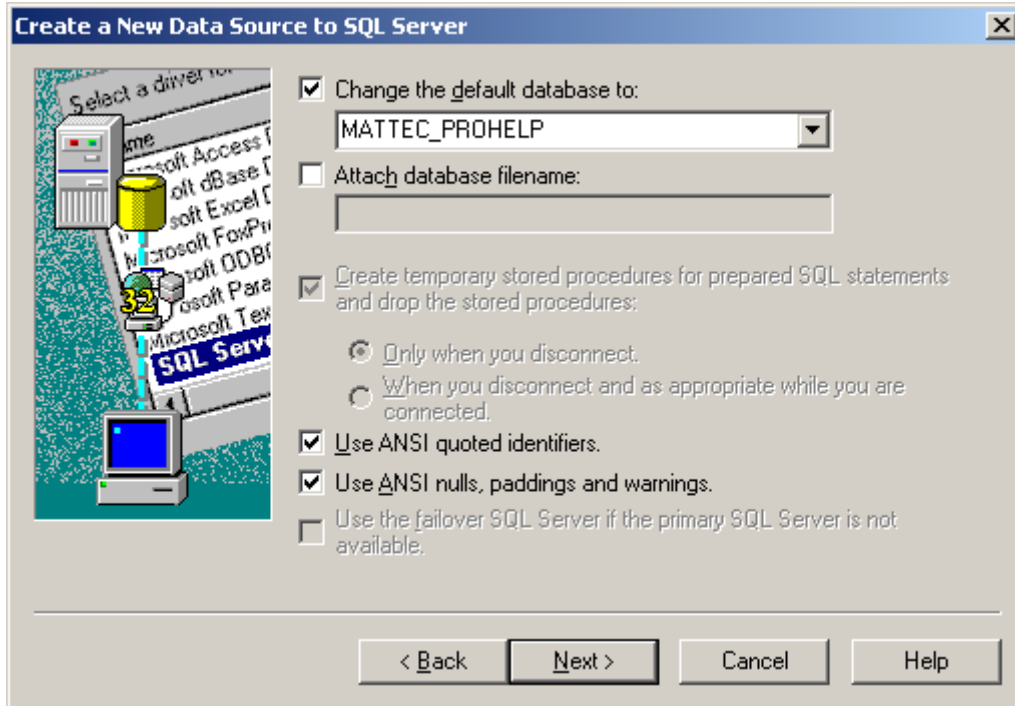


- Specify appropriate authentication options.



- If you modify the **Client Configuration**, the setting **TCP/IP** is preferred. This is the default setting.

- Change the default database to the name of the database on the server computer (*MATTEC_PROHELP*). Press **Next**.

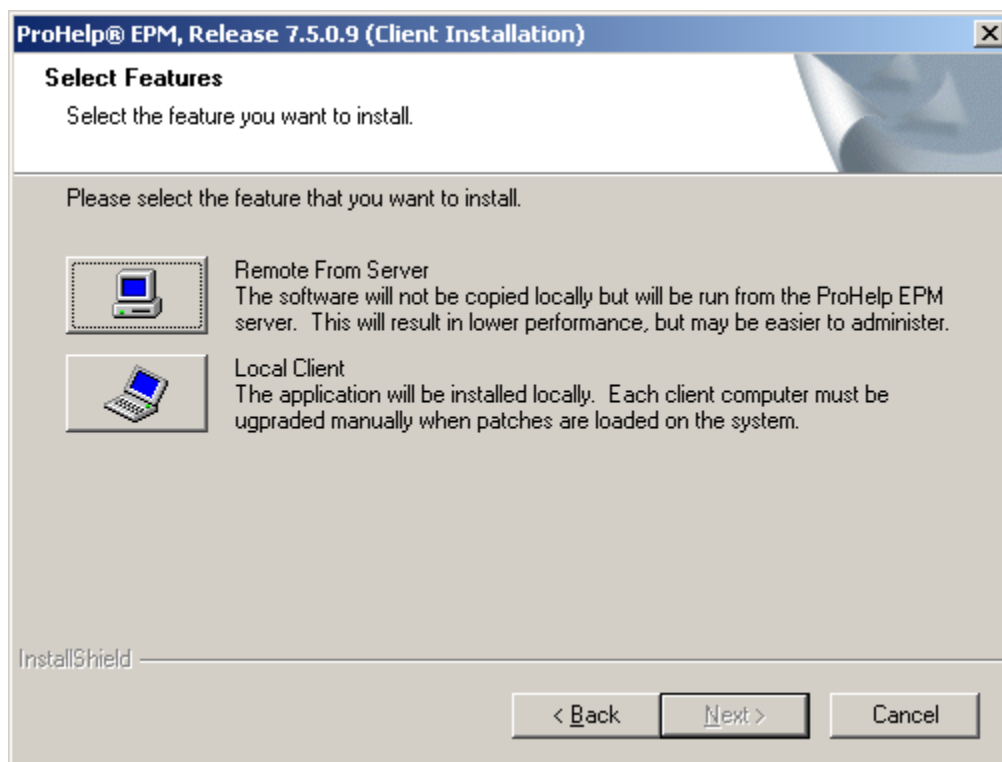


- Proceed through any remaining screens accepting the default values until finished. Ensure that you **test data source** and that the test is successful before exiting.

4. Install the Client Software

To install the ProHelp® EPM Client software, follow these steps:

- Insert the ProHelp® EPM Installation CD in the server computer.
- Run the program `..\Tools\vc redistrib_x86.exe`.
- Run the program `..\Client\Setup.exe`.
- Answer the questions asked by the Installation Wizard, as appropriate.



- If this is a new installation, when the installation is finished, select to reboot the computer. After the computer reboots, log in to the computer. Important components will be registered as part of the installation process after you log in.

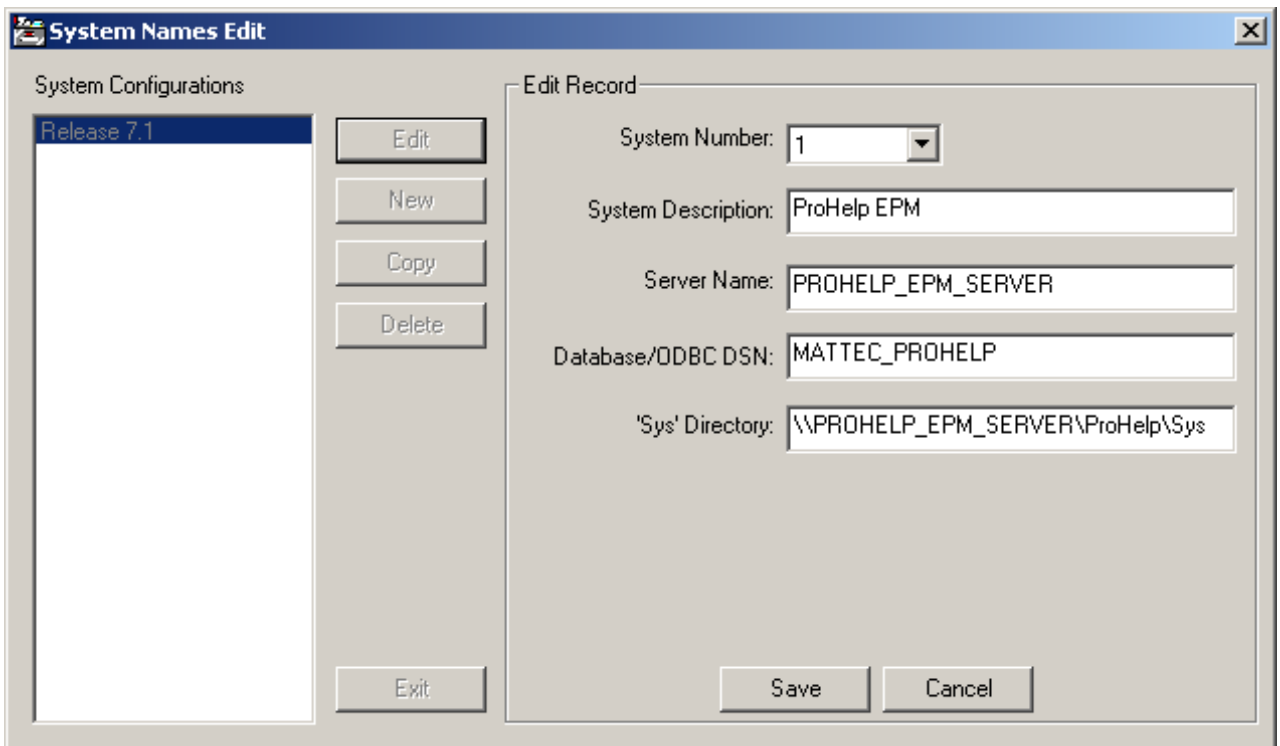
5. System Names Edit

If you performed a **Local Client** installation, and this is a new installation, then the client computer must be configured to allow applications to connect to the ProHelp® EPM system. The System Names Edit program is used to perform this configuration.

This step is not necessary, and should not be performed, if you performed a **Remote Client** installation.

To run the System Names Edit program, follow these steps:

- Click on the Microsoft Windows **Start Menu**, click **Programs**, click **Mattec**, click **Utilities**, and select **System Names Edit**.
- The **System Names Edit** program will be displayed.



System Names Edit Program

Create a configuration that points to the server computer, as appropriate. If this computer will access multiple ProHelp® EPM systems, define those systems here.

The following fields are available in the System Names Edit screen:

Field	Value
System Number	<i>1</i>
System Description	<i>ProHelp EPM</i> , or enter an appropriate description.
Server Name	Enter <i>SERVERNAME</i> , where <i>SERVERNAME</i> is the name of the ProHelp® EPM server.
Database / ODBC DSN	The name of the ODBC DSN that is capable of connecting to the database.
'Sys' Directory	\\ <i>SERVERNAME</i> \ProHelp\SYS, where \\ <i>SERVERNAME</i> is the name of the ProHelp® EPM server.

Contact the Mattec Customer Service Department if you need assistance determining the values for any of the above configuration parameters.