

Server Loading Instructions For ProHelp® EPM, Release 7.5

This application note describes the steps necessary to install the ProHelp® EPM, Release 7.5, software on the server computer. This application note is written for advanced users only.

On a modern computer using Microsoft SQL Server 2005, the entire installation process takes approximately 10-20 minutes, excluding the time to install Microsoft Windows Server and Microsoft SQL Server.

1. Preliminary Steps

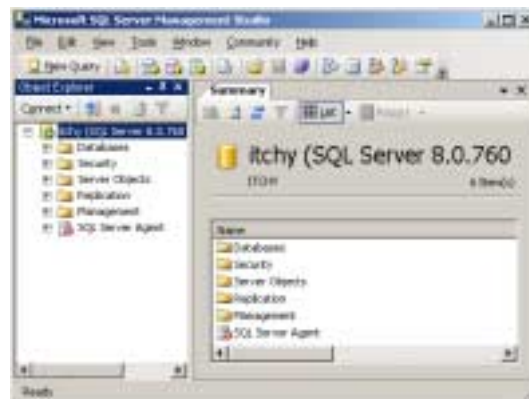
Before installing the ProHelp® EPM server software, it is necessary to do the following:

- Install and configure Microsoft Windows Server 2003.
- Install and configure Microsoft SQL Server 2005.

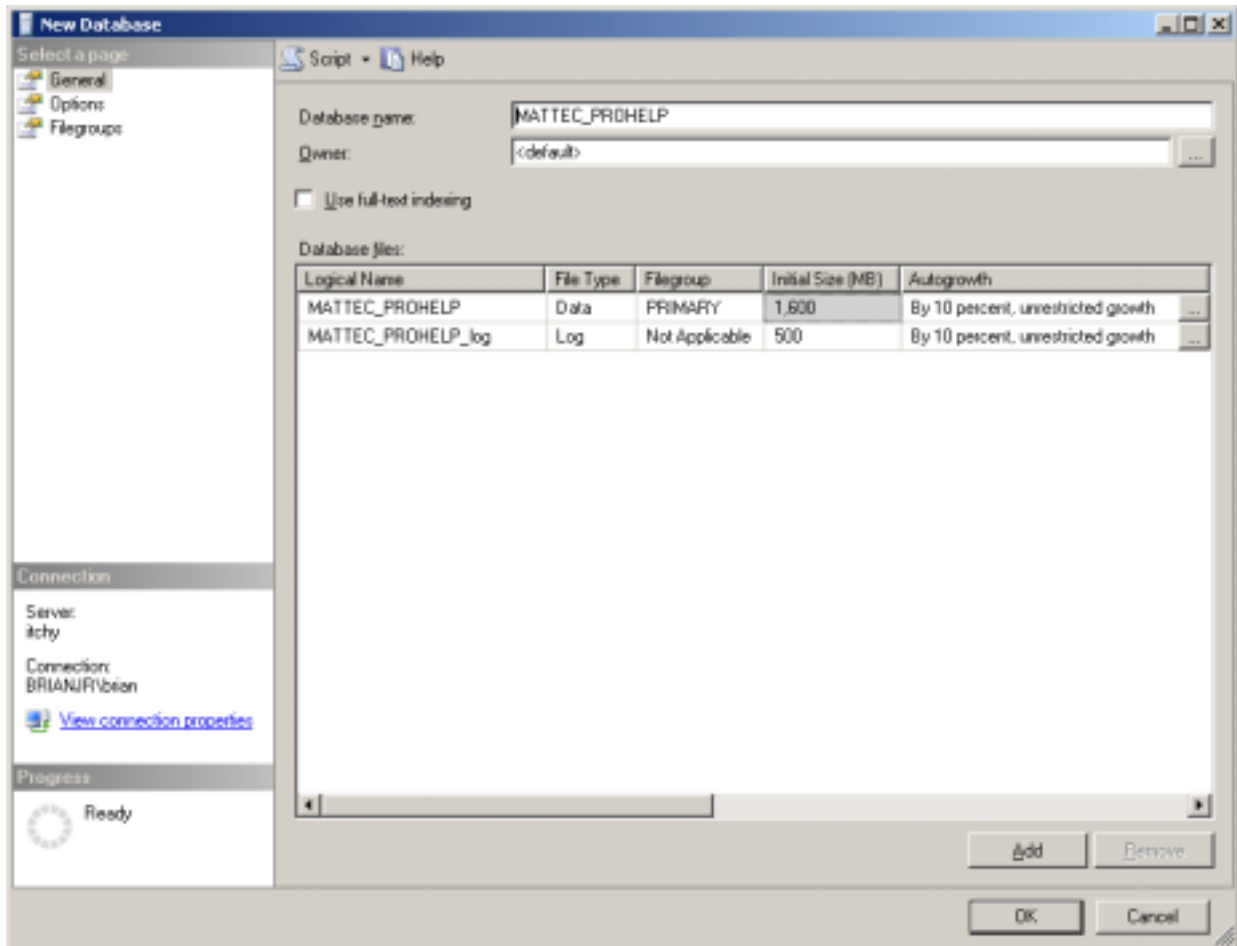
2. Configure the Database

Before installing the ProHelp® EPM server software, it is necessary to configure the Microsoft SQL Server database. To do this, follow these steps:

- Reboot the computer and log in as **Administrator**.
- Execute the **SQL Server Management Studio**. To do this, click on the Microsoft Windows **Start Menu**, click **Programs**, click **Microsoft SQL Server 2005**, and select **SQL Server Management Studio**.
- Navigate to the appropriate server name, as shown below:



- Right-click on **Databases** and select **New Database...**
- Name the database **MATTEC_PROHELP**, or an appropriate name, and configure it as described below:
 - A) Set the initial **Data** size to **1,600 MB**.
 - B) Set the initial **Log** size to **500 MB**.
 - C) Set the **Recovery Model** to **Simple**.

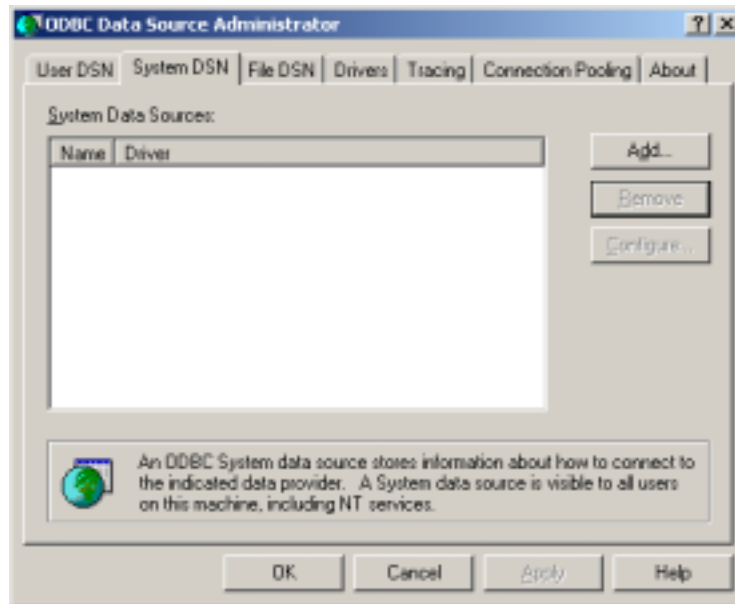


- Press **OK** to save your changes. It may take several minutes for the database to be created.

3. Create an ODBC Data Source

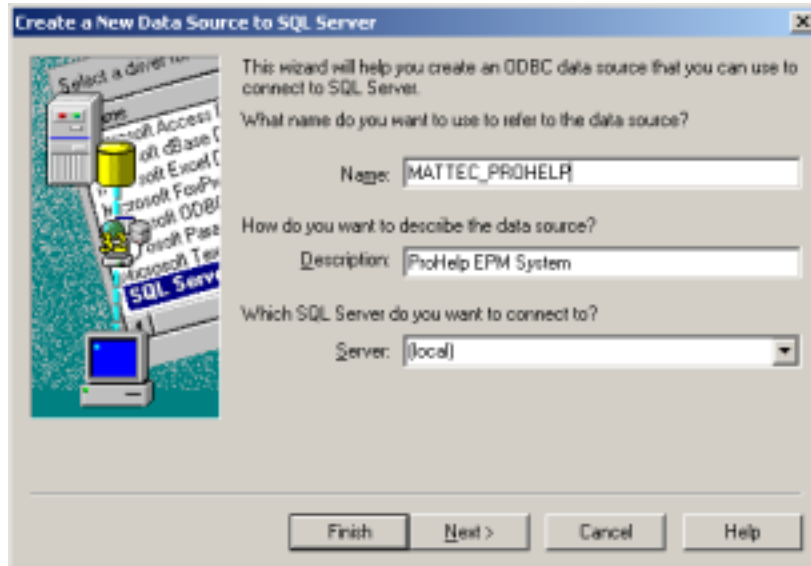
It is necessary to create an ODBC Data Source on the server for the database that was created in Step 2. To do this, follow these steps:

- Log in to the computer as **Administrator**.
- 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.

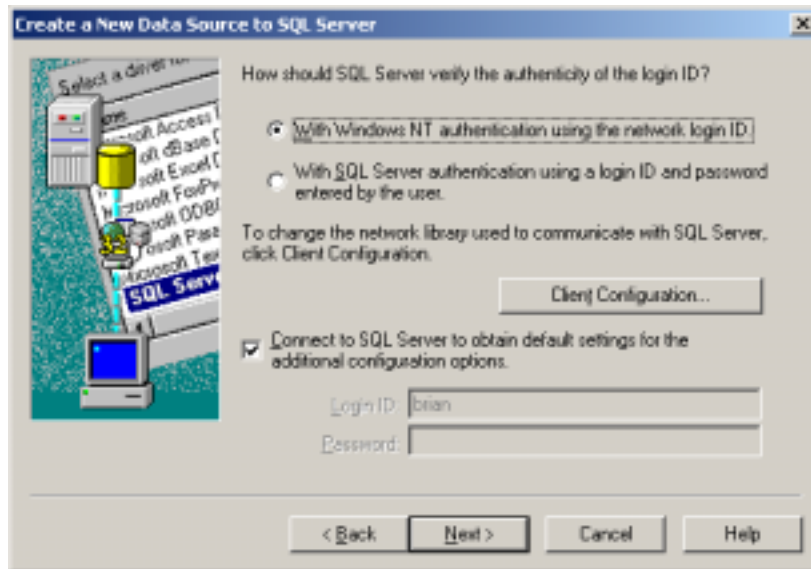


- In the **ODBC Data Source Administrator**, select the **System DSN** tab. Press the **Add...** button.
- When prompted to **select a driver for which you want to set up a data source**, select **SQL server**. Press **Finish**.

- 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 that was created in Step 2. Enter an appropriate **Description**, and select (**local**) as the **server**. Press **Next**.

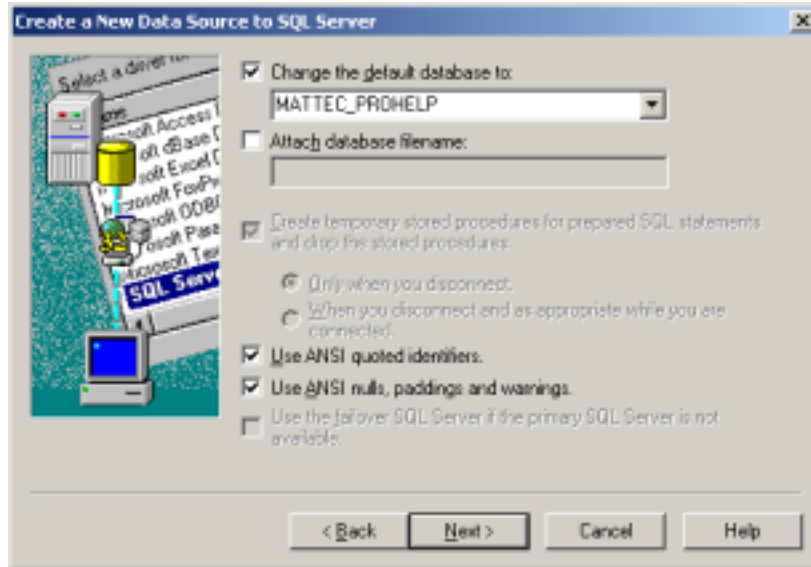


- Specify appropriate authentication options.



- 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 that was created in Step 2 (*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 Server Software

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

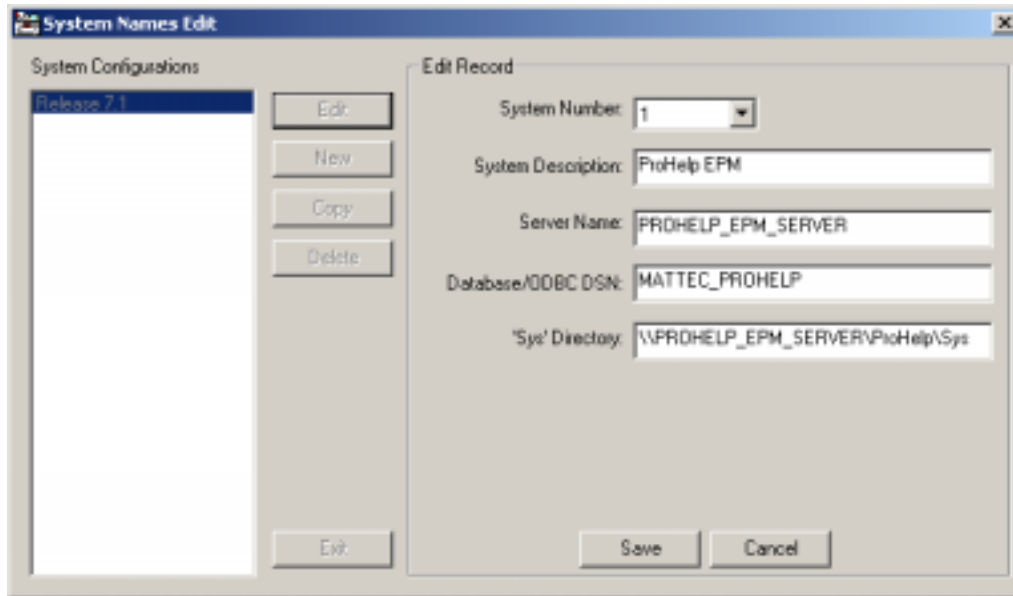
- Insert the ProHelp® EPM Installation CD in the server computer.
- Run the program `..Tools\vcredist_x86.exe`.
- Run the program `..\Server\Setup.exe`.
- Answer the questions asked by the Installation Wizard as appropriate.
- When the installation is finished, select to reboot the computer.
- After the computer reboots, log in as **Administrator**. Important components will be registered as part of the installation process after you log in.
- Grant database and system access as appropriate. This is described further in Step 8.
- Using Explorer, navigate to the `C:\Program Files\Mattec\ProHelp` directory. Right-click on the directory, select **sharing and security**, and select to **share this folder** as *ProHelp*. Grant **Permissions** to all users who will access ProHelp® EPM.
- Create the **system Name** file as described in Step 5.
- Copy the options file that has been provided by Mattec into the `C:\Program Files\Mattec\ProHelp\Sys\AuxData` directory.

5. System Names Edit

After loading the ProHelp® EPM software on the server computer, the computer must be configured to allow client applications to connect to the ProHelp® EPM system. The System Names Edit program is used to perform this configuration.

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

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.

6. Configure the Mattec Services

Before your system will start automatically after a reboot, it is necessary to configure the Mattec MIU Service. To do this, follow these steps:

- Log in to the computer as **Administrator**.
- Execute the **Services Administrator**. To do this, 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 **Services** icon.
- Double-click the **Mattec MIU Service**.
- Set the service to **Automatic**.
- You should never select to logon as the **Local System Account**. Instead, place a checkmark by **This Account** and specify a valid user name and **Password** for an administrative user who has access to SQL Server.
- Press **OK** to save your changes.
- Click the **File** menu and select **Exit** to exit the **Services Administrator**.

The Mattec Service Monitor is a service that will restart the Mattec MIU Service (or other services) if it stops running. To enable the Mattec Service Monitor, repeat the steps above for the service named **Mattec Service Monitor**.

7. Configure the Event View

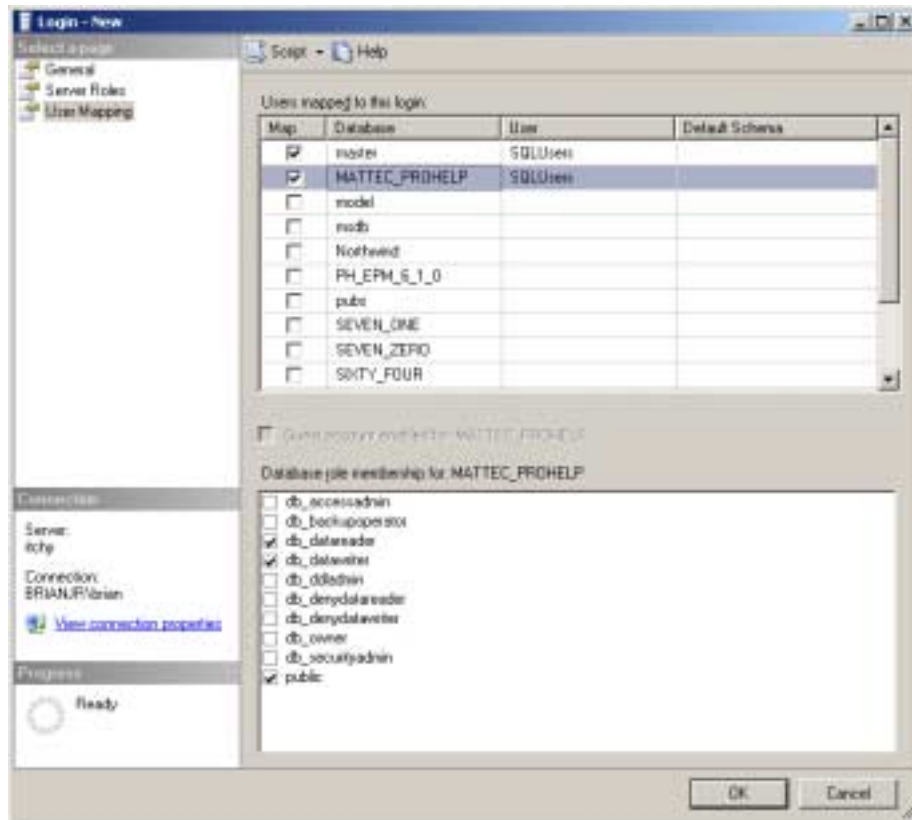
It is desirable to configure the Event Viewer. To do this, follow these steps:

- Log in to the computer as **Administrator**.
- Execute the **Event viewer**. To do this, 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 **Event Viewer** icon.
- Right-click the **Application** log and select **Properties**. Set the log to **overwrite events as needed**. Press **OK** to save your changes.
- Repeat the above step for the **security** and **system** logs.
- Click the **File** menu and select **Exit** to exit the **Event viewer**.

8. Database and Security Access

To grant database access to Microsoft Windows users, follow these steps:

- Log in to the computer as **Administrator**.
- Execute the **SQL Server Management Studio**. To do this, click on the Microsoft Windows **Start Menu**, click **Programs**, click **Microsoft SQL server 2005**, and select **SQL Server Management Studio**.
- Navigate to the appropriate **Server** in the **Object Explorer**.
- Select the **security** folder and click **Logins**.
- Right-click in the white area and select **New Login**. Add a login for the group **SQLUsers**.
- Select the **User Mapping** page.



- Set database access for the `SQLUsers` group as described below:

Database	Permit in database role
<i>MATTEC_PROHELP</i>	<code>public</code>
<i>MATTEC_PROHELP</i>	<code>db_owner</code> (select this for administrative groups)
<i>MATTEC_PROHELP</i>	<code>db_datareader</code>
<i>MATTEC_PROHELP</i>	<code>db_datawriter</code>
<code>master</code>	<code>public</code>
<code>master</code>	<code>db_datareader</code>
<code>master</code>	<code>db_datawriter</code>

- Set database access for other Microsoft Windows groups as required.

9. Advanced Installation Notes

Advanced installation notes for ProHelp EPM can be found in the following sections:

Installing Microsoft SQL Server

- Microsoft SQL Server can be installed on the same computer where the ProHelp® EPM Server software will be installed, or it can be installed on a different computer.
- Microsoft SQL Server can be installed as a **Named Instance**, if desired.

64-Bit Systems – Server Installation

The ProHelp® EPM server (and client) software can be installed on 64-bit Microsoft Windows Server 2003 utilizing 64-bit Microsoft SQL Server 2005.

When installing ProHelp® EPM on 64-bit systems, make the following changes to the standard installation instructions:

- In Step 3, create a **32-bit ODBC DSN**. To do this, run the program `C:\Windows\SysWOW64\odbcad32.exe`.
- During the installation in Step 4, modify the location of the **SQL Server BINN** directory. The correct location is `C:\Program Files\Microsoft SQL Server\90\Tools\Binn`.

By default, the installation program will probably think the BINN directory is located in the `C:\Program Files (x86)\....` directory structure.

64-Bit Systems – Client Installation

The ProHelp® EPM client software can be installed on 64-bit Microsoft Windows operating systems.

When installing the ProHelp® EPM client on a 64-bit system, make the following changes to the standard client installation instructions:

- Create a **32-bit ODBC DSN**. To do this, run the program `C:\Windows\SysWOW64\odbcad32.exe`.

ProHelp® EPM Security

Users of the ProHelp® EPM system must be granted access to different areas of the software. This is done using standard Microsoft Windows security. This can be implemented using local security or domain security, and is described further in the *ProHelp® EPM System Administration Manual, #810-0014*.

Older Microsoft Software

ProHelp® EPM, Release 7.5.0, is typically installed on Microsoft Windows Server 2003 and Microsoft SQL Server 2005. However, it can still be installed on Microsoft Windows Server 2000 and/or Microsoft SQL Server 2000. Installation times for SQL Server 2000 are dramatically longer than installation times for SQL Server 2005.

Multiple Monitoring Nodes

ProHelp® EPM, Release 7.1.1 and later, supports multiple monitoring nodes. One node is designated the “Primary” Monitoring Node and is responsible for installing/upgrading the database. Additional monitoring nodes are designated “Secondary” Monitoring Nodes.

The standard Server Installation program is identical to the Primary Monitoring Node installation program.

In order to install a Secondary Monitoring Node, the Mattec Manufacturing Department will edit the file `setup.ini` that is located in the `..\server` directory and add the following line:

```
[Startup]
AllowMultipleNodes=1
```

When the above modification has been made, you will be prompted whether the server computer that you are loading on is the Primary Monitoring Node or the Secondary Monitoring Node. See below:

