

Client Loading Instructions For ProHelp® EPM, Release 7.7

This application note describes the steps necessary to install the ProHelp® EPM, Release 7.7, 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 7, Microsoft Windows Vista or Microsoft Windows XP. Support for older Microsoft client operating systems no longer exists.

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).
- 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. **Failure to install this will result in errors when attempting to launch Mattec’s System Reports application.**

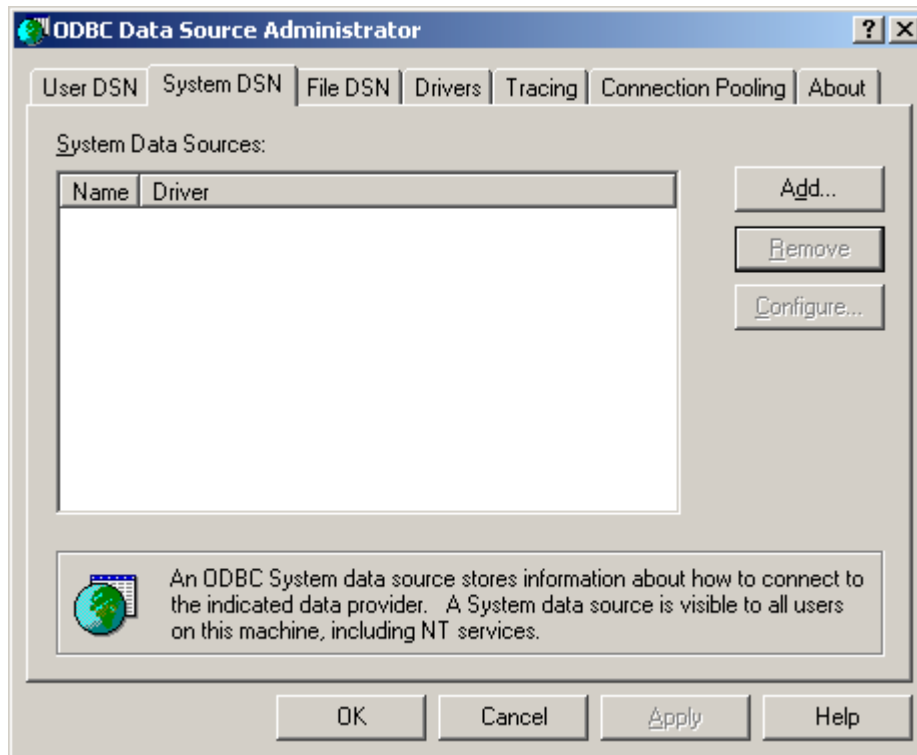
The following sections will simply describe these steps in more detail.

2. Create an ODBC Data Source

When installing on a 64 Bit operating system, it is necessary to create an ODBC source in the 32 bit space. In order to do this, launch the 32 bit version of the ODBC Administrator. This file can be found in the following location: C:\Windows\SysWOW64\odbcad32.exe.

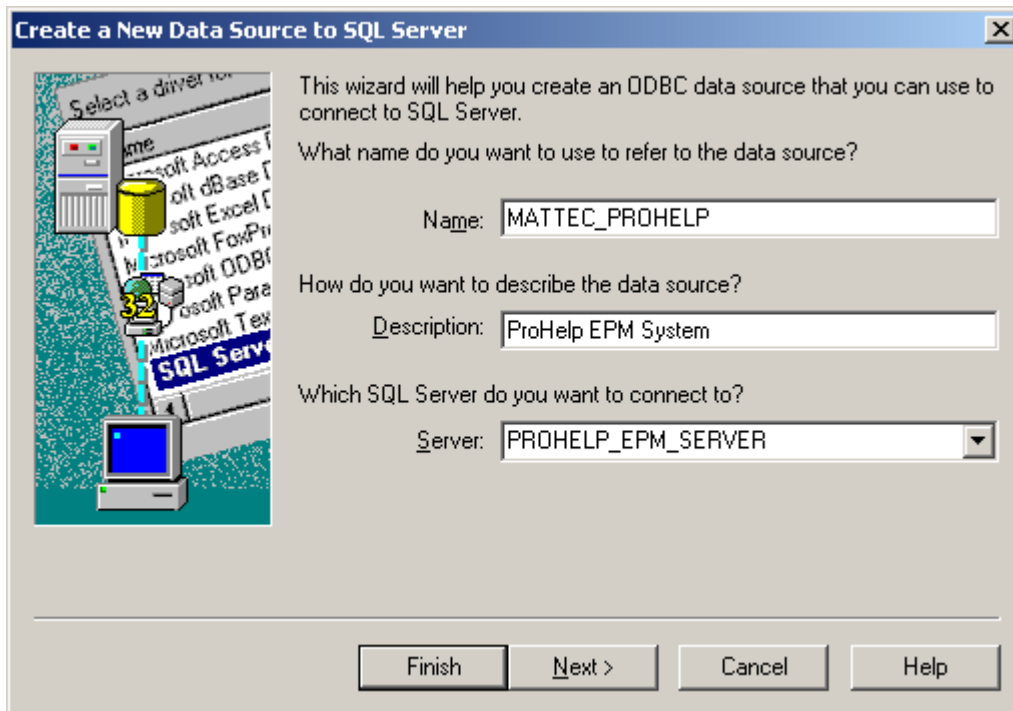
It is necessary to create an ODBC Data Source for the database on the SQL server computer. To do this, follow these steps:

- 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.

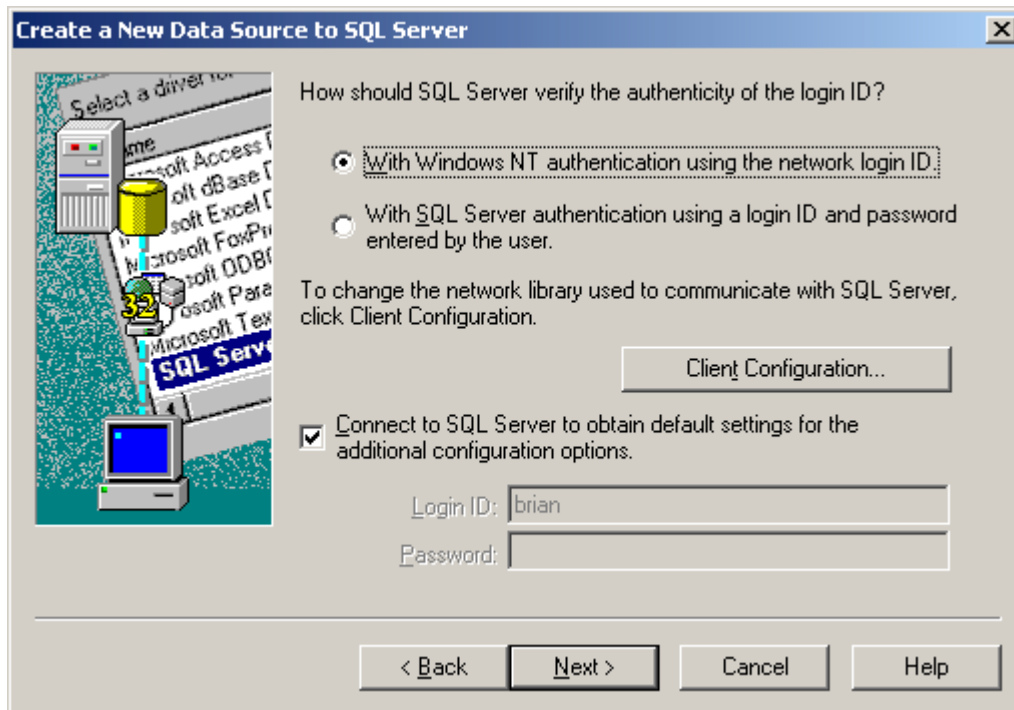


- In the **ODBC Data Source Administrator**, select the **System DSN** tab. Press the **Add..** button.
- When prompted to **Select a driver for which you want to set up a data source**, select **SQL Server**. Press **Finish**.

- When prompted, specify **MATTEC_PROHELP**, or an appropriate name, as the **Name**. If you are installing a remote client, this name must match the ODBC Data Source name that is specified on the server. For a local client, this name can be the same as, or different from, the actual ODBC name on the server computer. For simplicity sake, we recommend naming the data source the same as the actual name of the database on the server. Enter an appropriate **Description**, and specify the SQL server computer's name as the **Server**. Press **Next**.



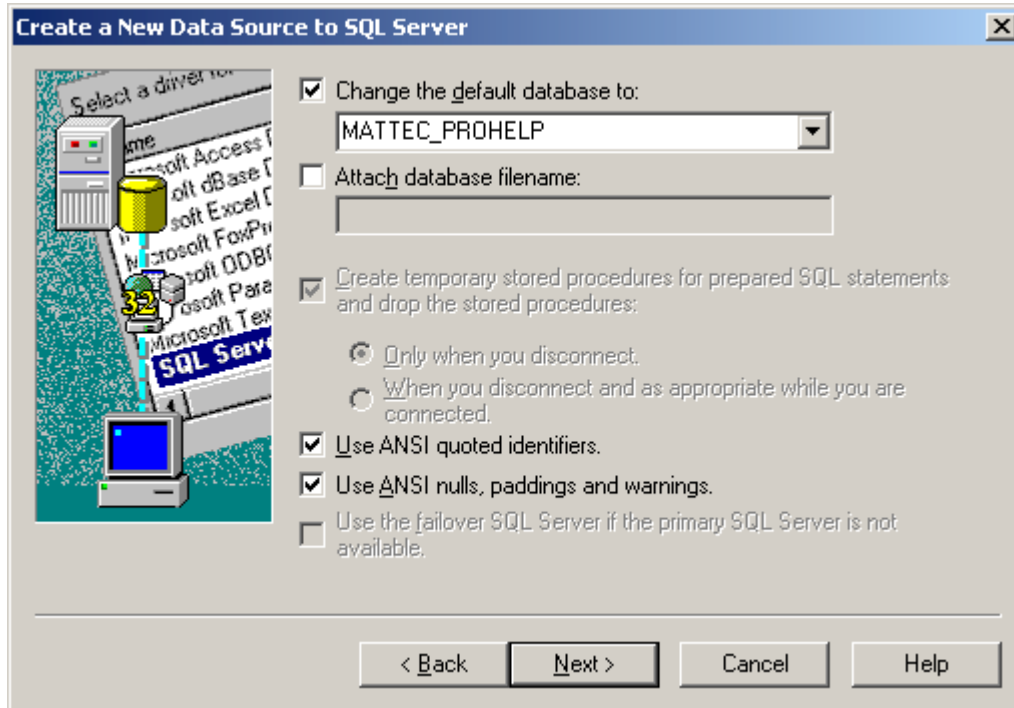
- Choose With Windows NT authentication using the network login ID.



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

If the Data Source creator fails after this step, it is most likely due to a permissions issue with the user you are installing this for. Please check that this user has an account either on the domain or on the SQL Server's computer and that this user is a member of the SQLUSERS group. This group is created by Mattec at install and gives users in this group the appropriate permissions to the SQL database. It is possible that your group name may differ. If you need assistance with this step, please contact the [Mattec Helpdesk](#).

- 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.

Remote From Server is the preferred client for the following scenario:

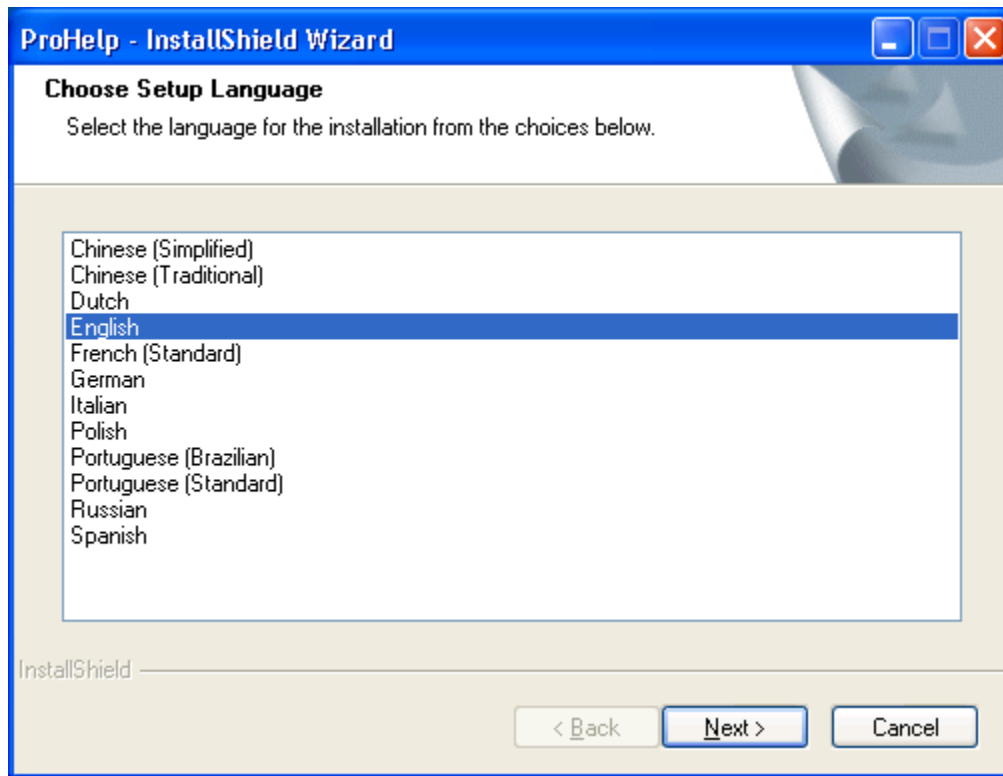
- The computer will remain on the local network at all times
- The user only needs to access one ProHelp® EPM system

Local Client is preferred under the following scenario:

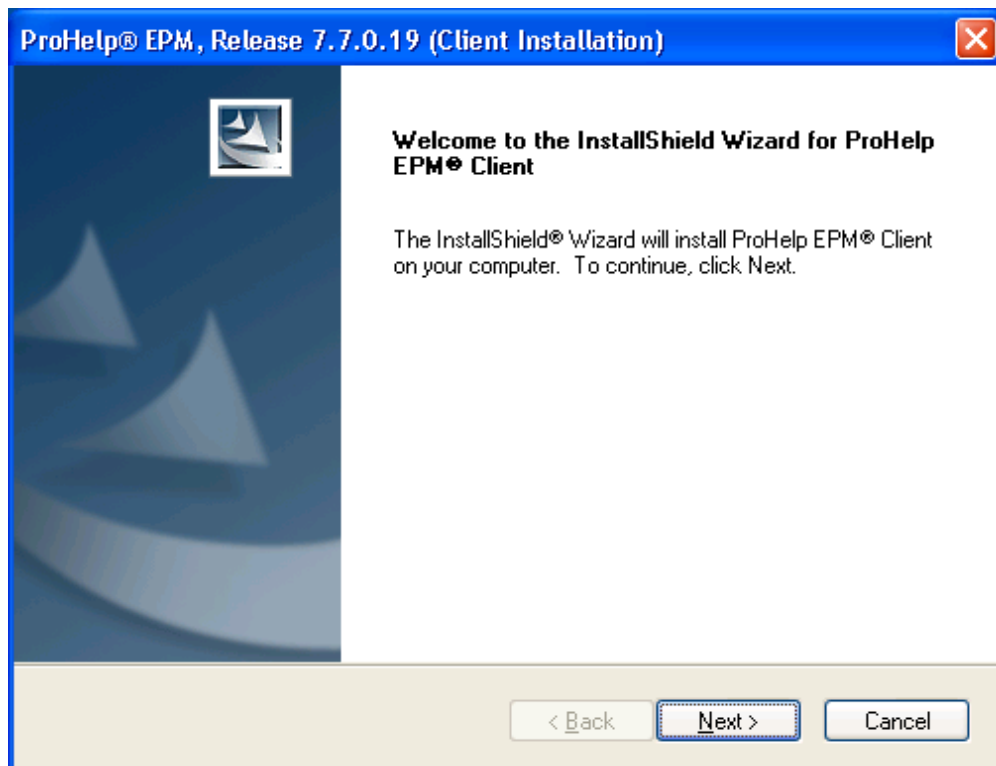
- The user will access the system via a VPN or other WAN
- The user needs to access more than one ProHelp® EPM system

Local clients have the advantage of being slightly faster to launch, due to the fact that the client application resides on the local computer. However, they require a bit more upkeep. Any special applications, patches or updates must be done on each and every client.

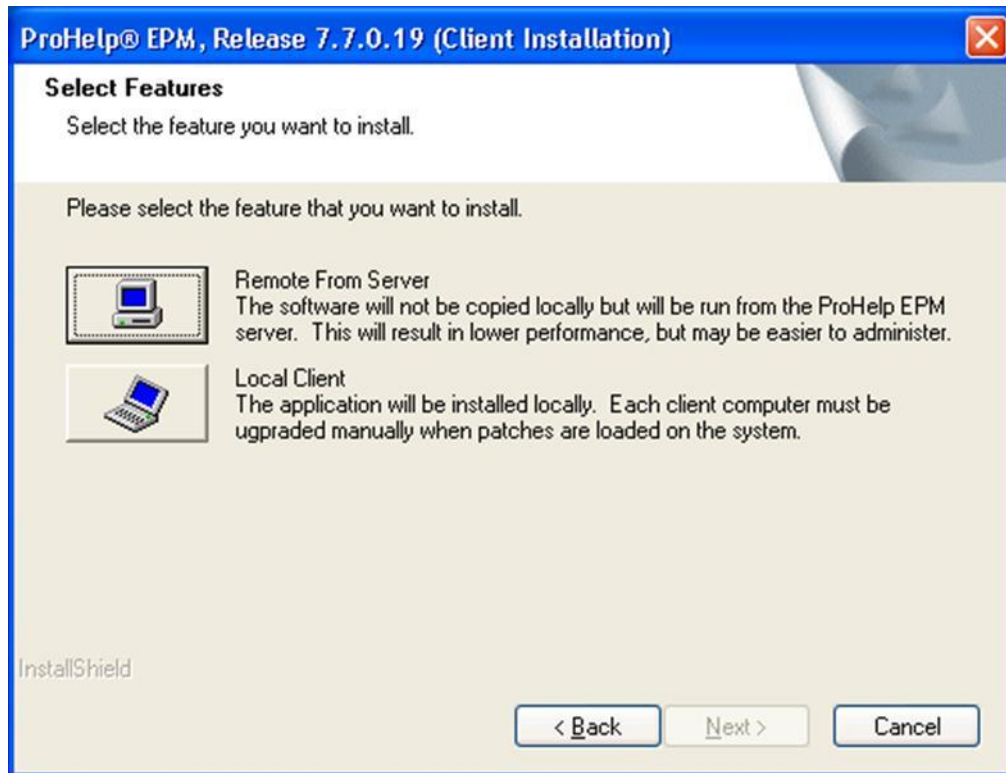
Remote clients are easier to administer, but can be a bit slower on initial launch. Since the application resides on the Mattec server, it must run the application over the network when first opened. However, when installing specials, patches or upgrades, it is usually not necessary to upgrade all of the clients each time.



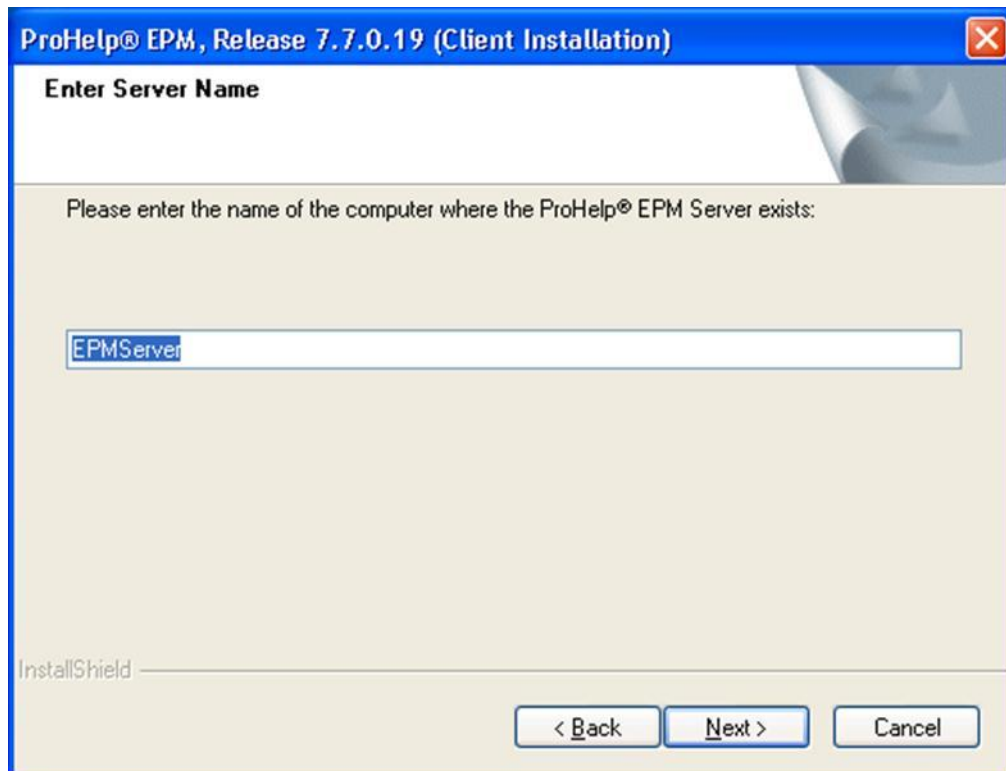
- Choose the appropriate language for the Installation



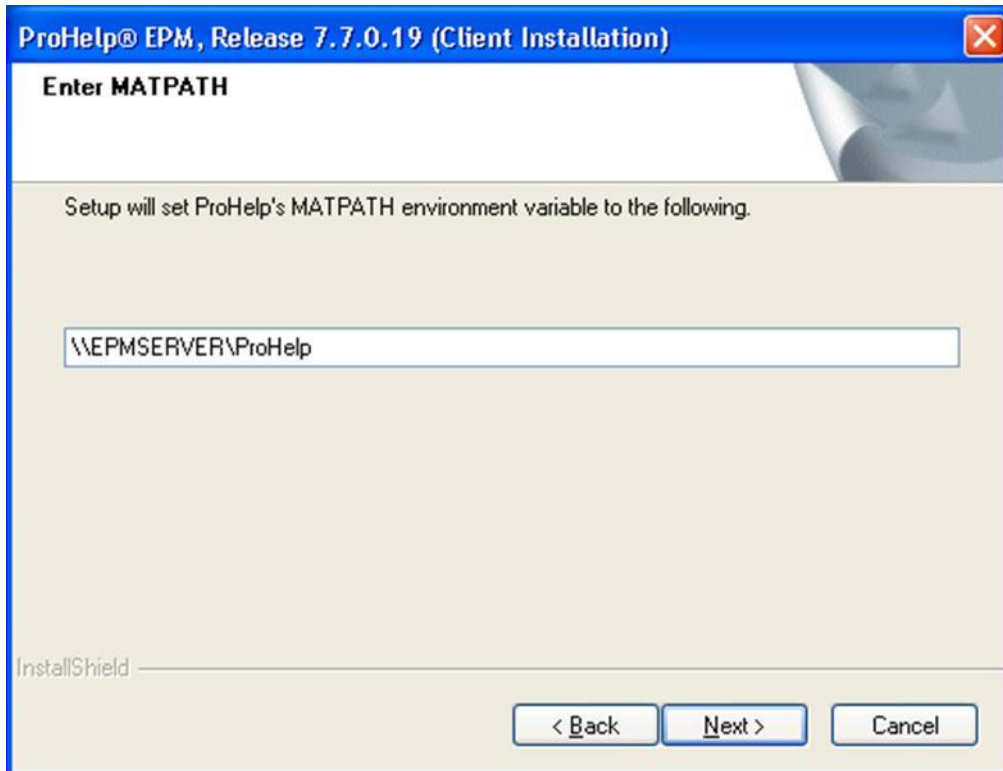
- Choose ***NEXT***



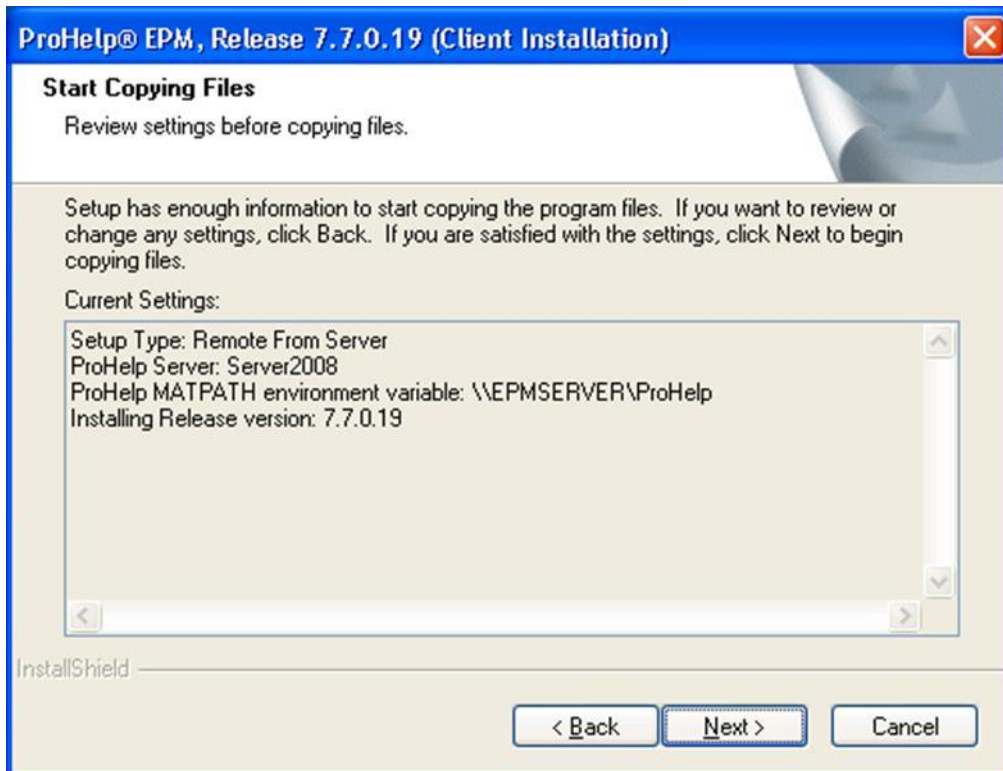
- Choose either a **Remote from Server** or **Local Client** as appropriate



- For **Remote from Server**, enter the name of the ProHelp® EPM server.

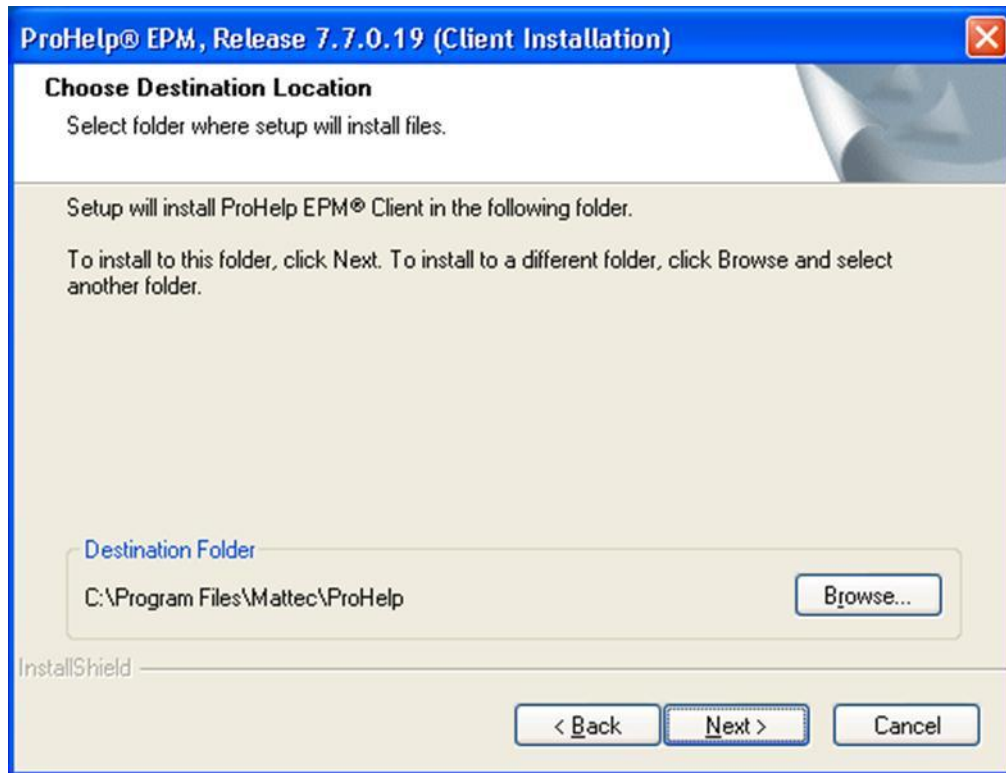


- This should point to the shared folder on the ProHelp® EPM server.

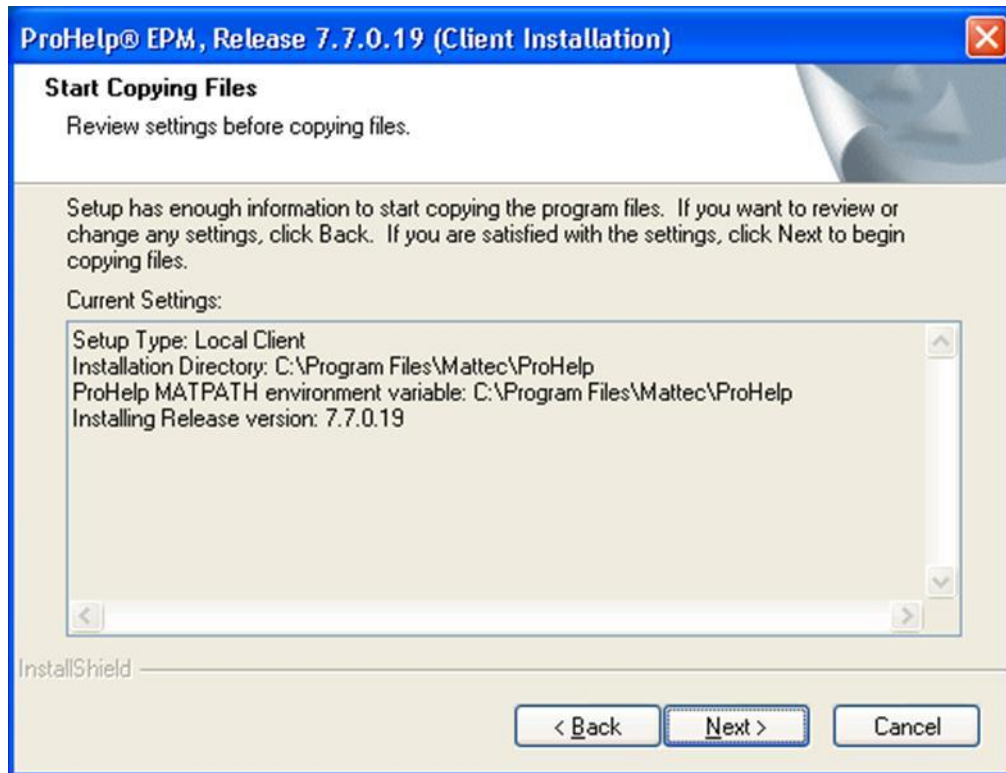


- Review this summary screen and verify the information is correct, then choose **NEXT**

For **LOCAL** Clients, follow these instructions:



- This should point to the installation folder where the software is to be installed. If this is a network ([\\servername](#)) versus a local path (c:\program files\..), do **NOT** continue the installation. Please stop, uninstall the Mattec software and begin from scratch.



- Review this summary screen and verify the information is correct, then choose **NEXT**
- 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 as the same user used to install the client. Important components will be registered as part of the installation process after you log in.
- For upgrades, the system should immediately register the files needed and a reboot of the system is not required.
- Remote clients are finished at this point, however local clients will need all specials and/or patches applied. Please follow the instructions as described in the readme.txt file. This can be found in the \patches folder, or was sent with your special software .

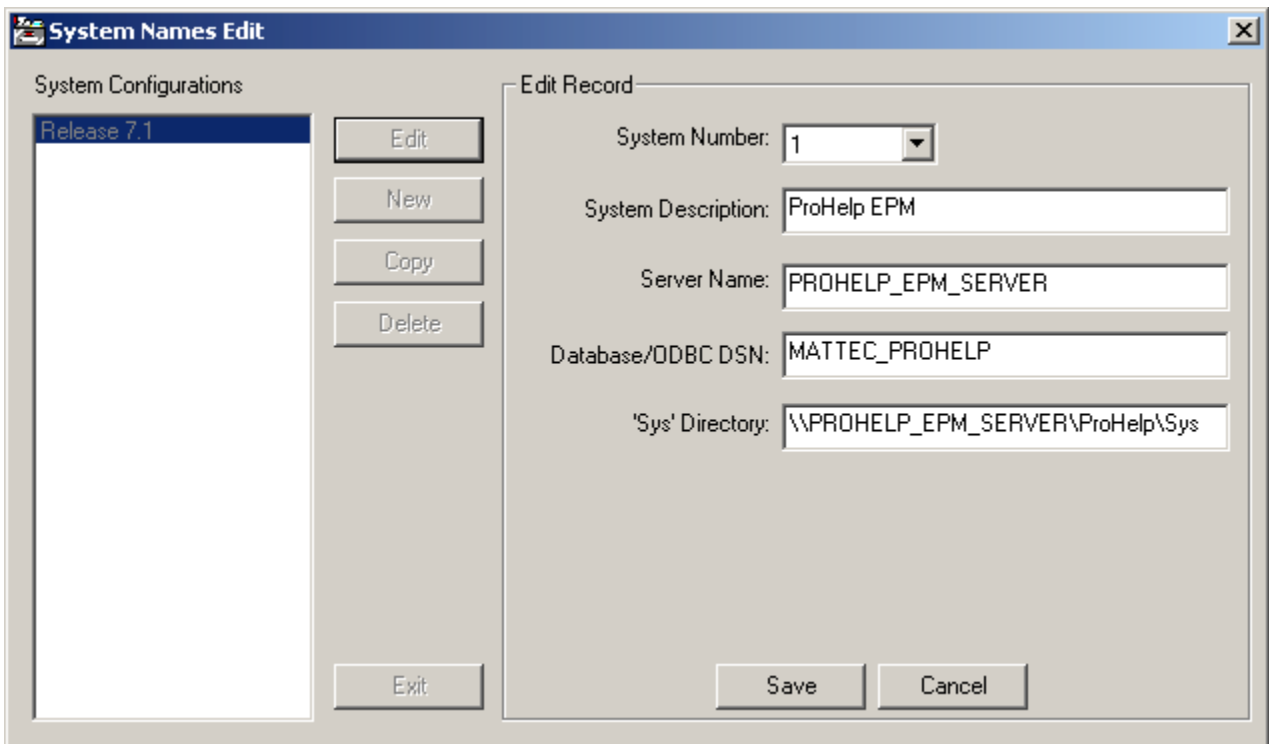
5. System Names Edit

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**.
- When prompted for the password, use the word *cettam*
- The **System Names Edit** program will be displayed.



System Names Edit Program

Create a configuration that points to the server computer, as appropriate.

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

Field	Value
System Number	1
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.

To point the client to multiple ProHelp® EPM systems, repeat the System Names Edit step. Each system will need a unique System number and Data Source Name.

When multiple Systems are configured, the user will be presented with a drop down menu to choose the appropriate system when launching the Main Menu application.



If further assistance is needed when installing or configuring a ProHelp® EPM client, please contact the [Mattec Helpdesk](#).