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Client Loading Instructions for Mattec MES

Reference Document
Release #8.1

Contents

Introduction

This application note describes the steps necessary to install the ProHelp® EPM, Release 8.1, client software on a workstation computer. It presumes that the Mattec MESserver software has already been installed and that the directory "prohelp" has been shared on the server computer.

The Mattec MESclient 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.

Overview of Steps

When you install the Mattec MESclient 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 Mattec MESclient 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.

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:

1. Log in to the client computer as the user who will run ProHelp® EPM.

2. Click on the Microsoft Windows Start Menu, click **Settings**, and select Control Panel.

3. In the Control Panel window, double-click the Administrative Tools icon.

4. In the Administrative Tools window, double-click the Data Sources (ODBC) icon. The ODBC Data Source Administrator window will be displayed.
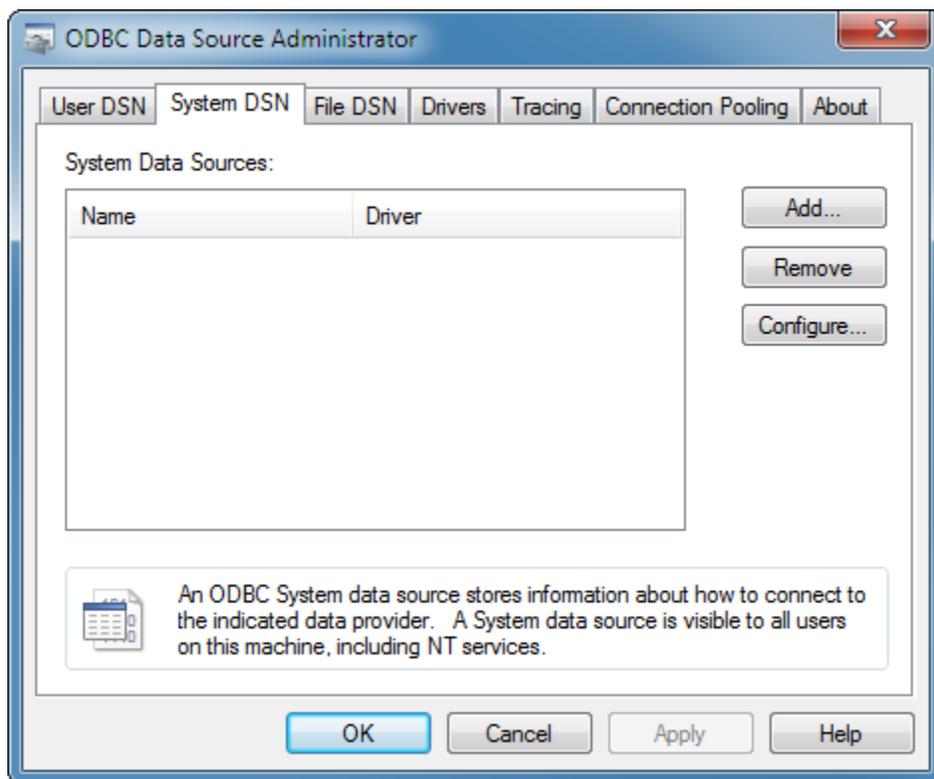
5. In the ODBC Data Source Administrator, select the **System DSN** tab.

6. Press the **Add…** button.

7. When prompted to select a driver for which you want to set up a data source, select **SQL Server**.

8. Press **Finish.** If SQL Server Native Driver 10.0 or higher is available, please choose this as it has some speed advantages.

9. 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.

10. Enter an appropriate Description, and specify the SQL server computer's name as the Server.

11. Press Next.
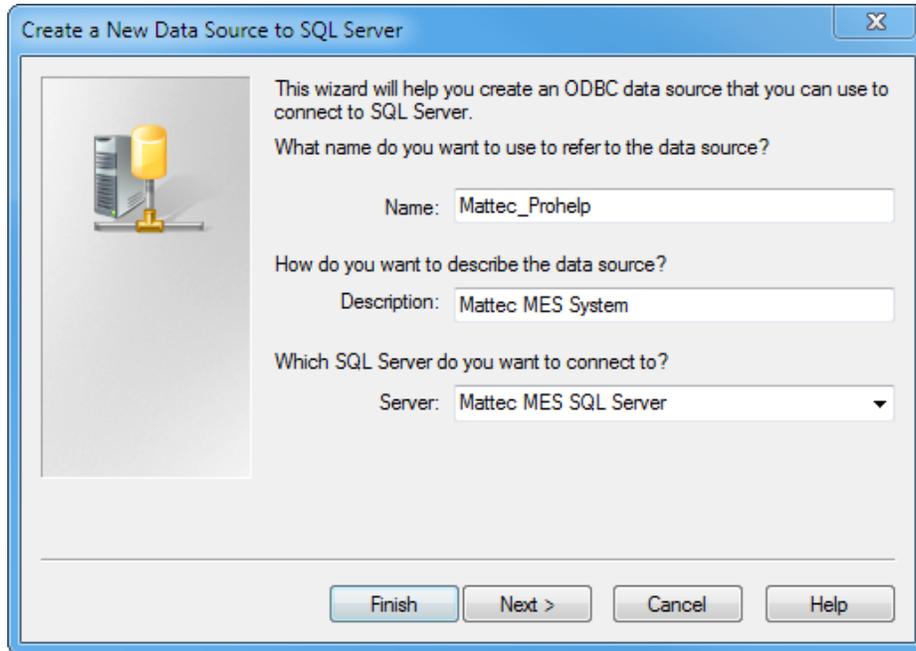
12. Choose With Windows NT authentication using the network login ID.

NOTE: 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.

13. Change the default database to the name of the database on the server computer (MATTEC_PROHELP). Press Next.
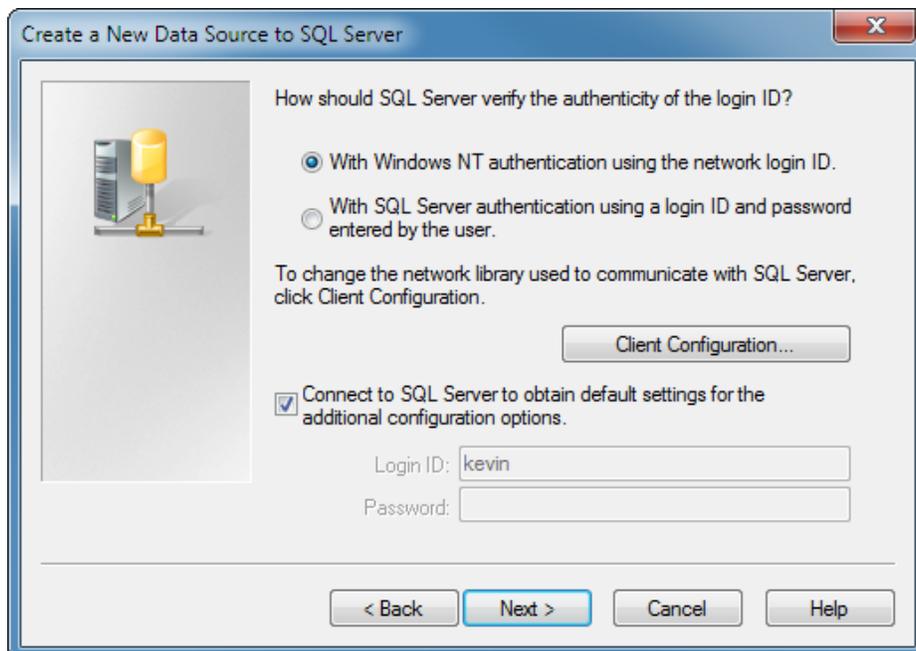
14. Proceed through any remaining screens accepting the default values until finished. Ensure that you Test Data Source and that the test is successful before exiting.

Install the Client Software

To install the Mattec MES Client software, follow these steps:

1. Insert the Mattec MES Version 8.1.0.1 Installation CD into the computer.

2. Run the program ..\Tools\vcredist_x86.exe.

3. Run the program ..\Client\ProHelpClient8.1.0.1.exe.

4. Answer the questions asked by the Installation Wizard, as appropriate.

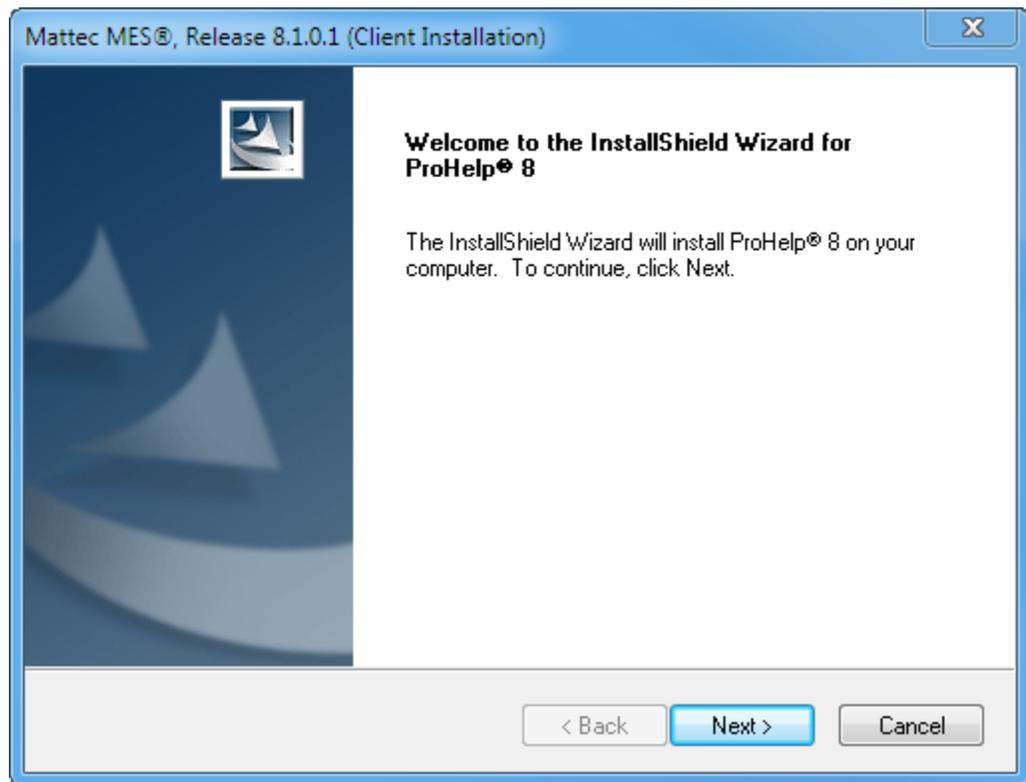**Remote From Server** is the preferred client for the following scenario:

- The computer will remain on the local network at all times
- The user only needs to access one Mattec MES system

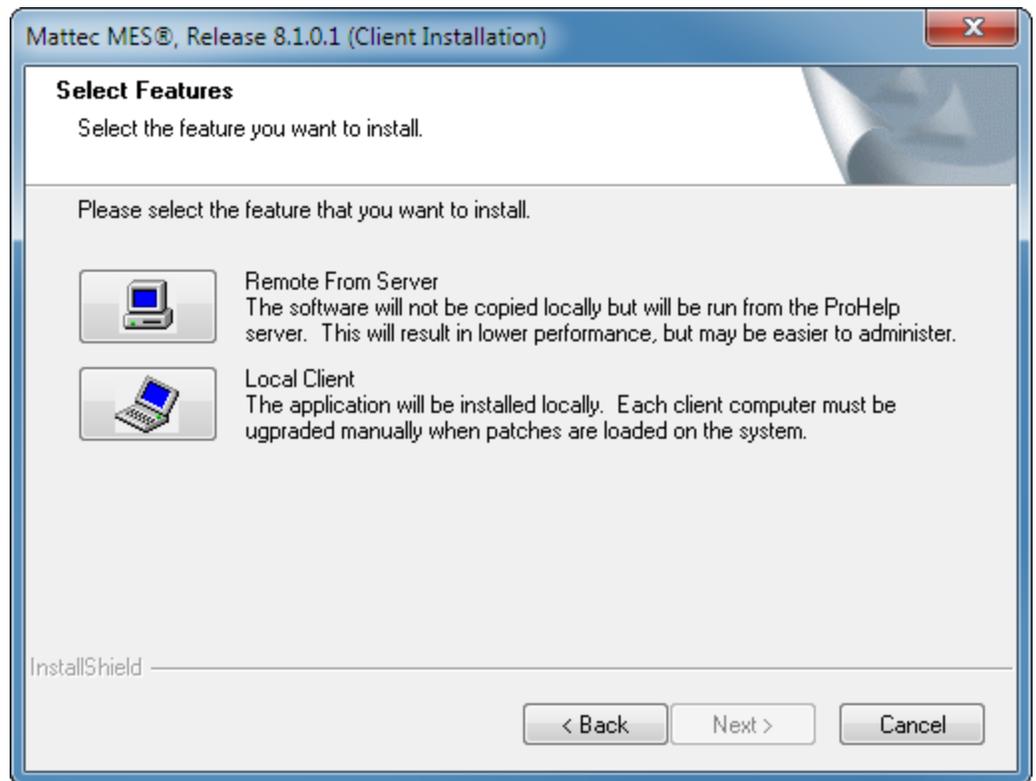**Local Client** is preferred under the following scenario:

- The user will access the system via a VPN or other WAN
- The user needs to access more than one Mattec MES 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
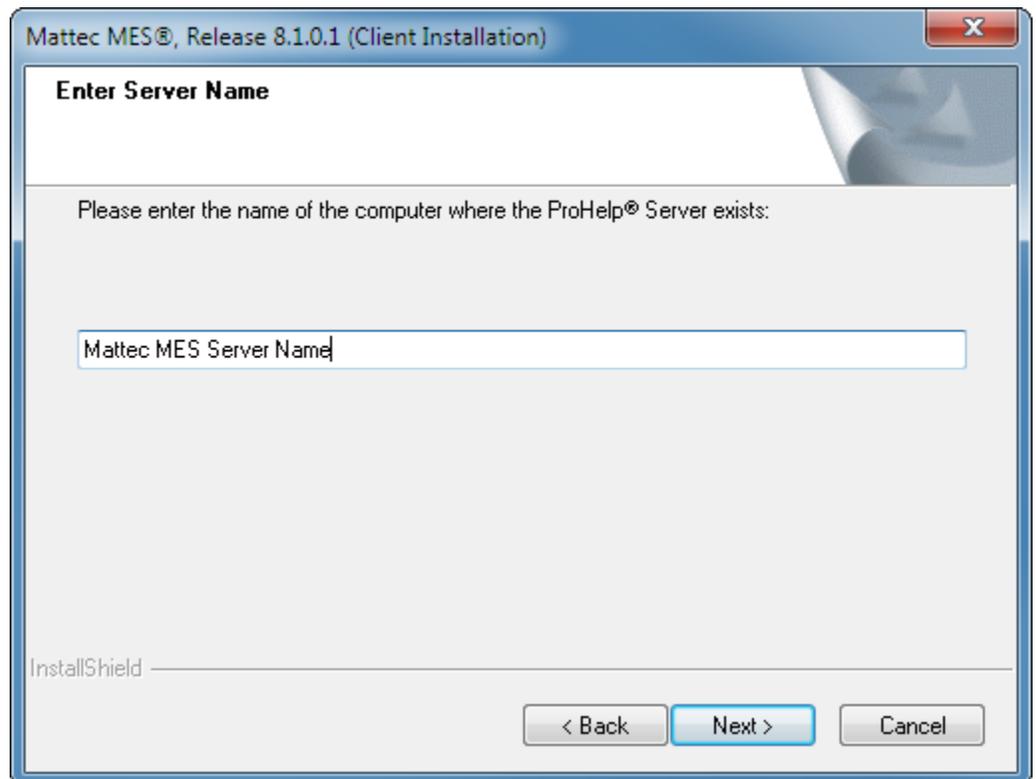
Remote clients are easier to administer, but can be a bit slower on initial launch. Since the application resides on the Mattec server, it must run the application over the network when first opened. However, when installing special or patches, it is usually not necessary to upgrade all of the clients each time.
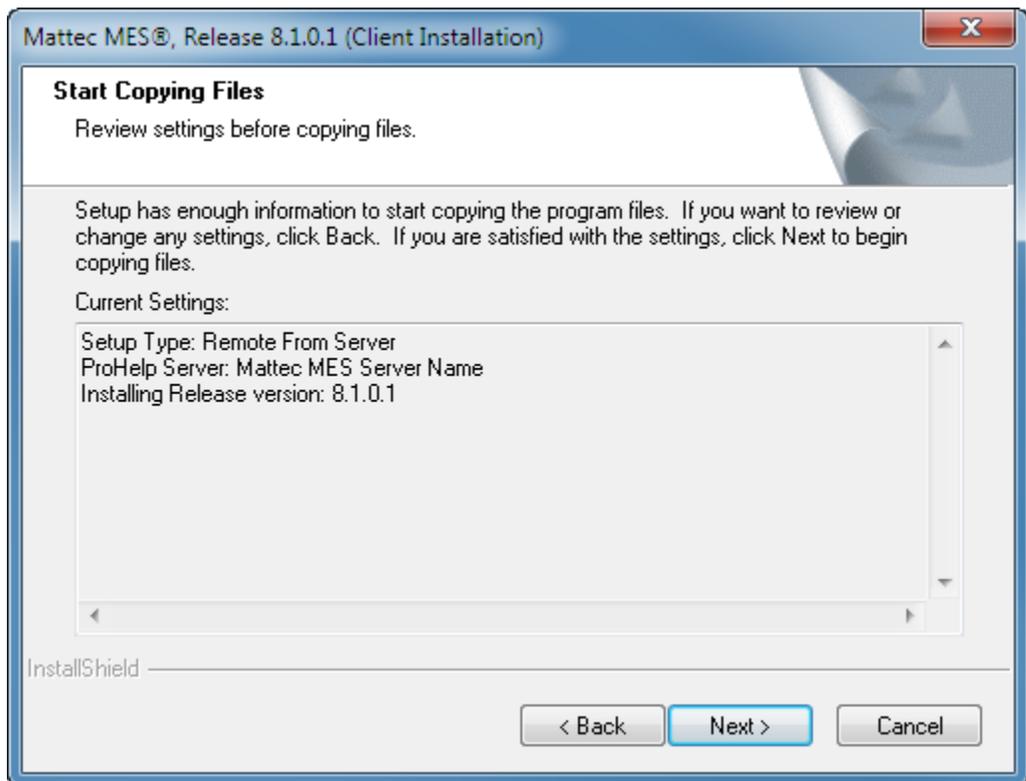

5. Choose **NEXT**.

Mattec MES®, Release 8.1.0.1 (Client Installation)

Select Features
Select the feature you want to install.

Please select the feature that you want to install.

Remote From Server
The software will not be copied locally but will be run from the ProHelp server. This will result in lower performance, but may be easier to administer.

Local Client
The application will be installed locally. Each client computer must be ugpraded manually when patches are loaded on the system.

InstallShield

< Back   Next >   Cancel

6.   Choose either a Remote from Server or Local Client as appropriate

Mattec MES®, Release 8.1.0.1 (Client Installation)

Enter Server Name

Please enter the name of the computer where the ProHelp® Server exists:

Mattec MES Server Name

InstallShield

< Back   Next >   Cancel

7. For Remote from Server, enter the name of the Mattec MES server.

8. Review this summary screen and verify the information is correct, then choose NEXT

For LOCAL Clients, follow these instructions:
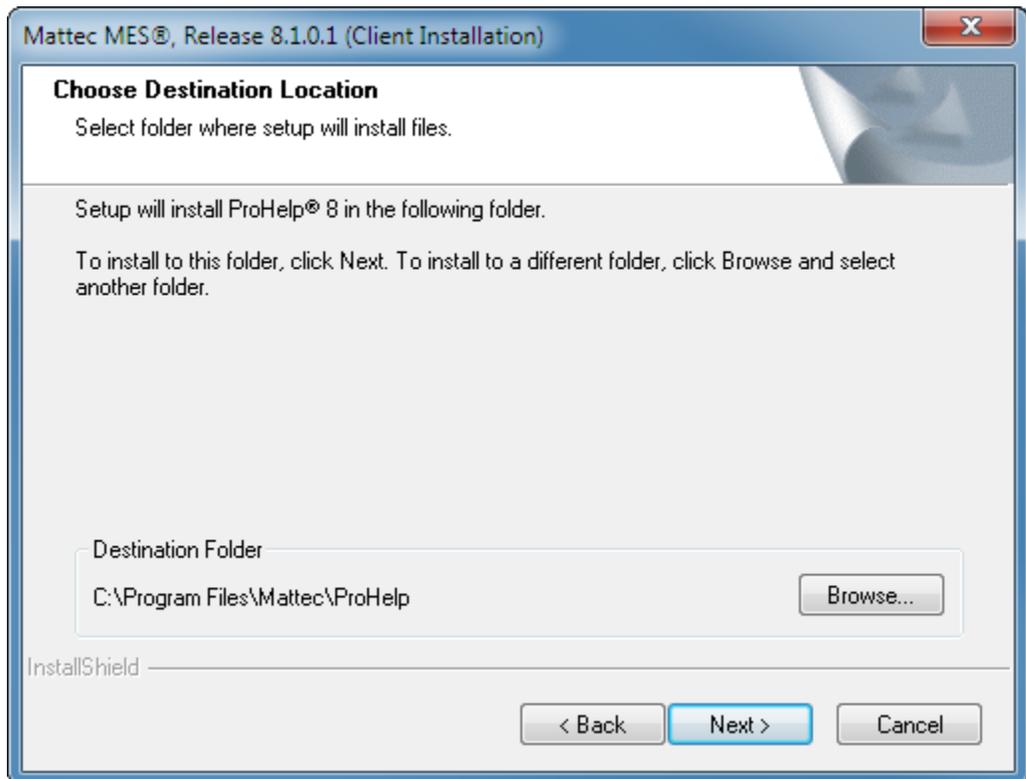
9. This should point to the installation folder where the software is to be installed. If this is a network (\\servername\) versus a local path (c:\program files\..), do **NOT** continue the installation. Please stop, uninstall the Mattec software and begin from scratch. **Failure to stop at this point, MAY render your server non-operational.**
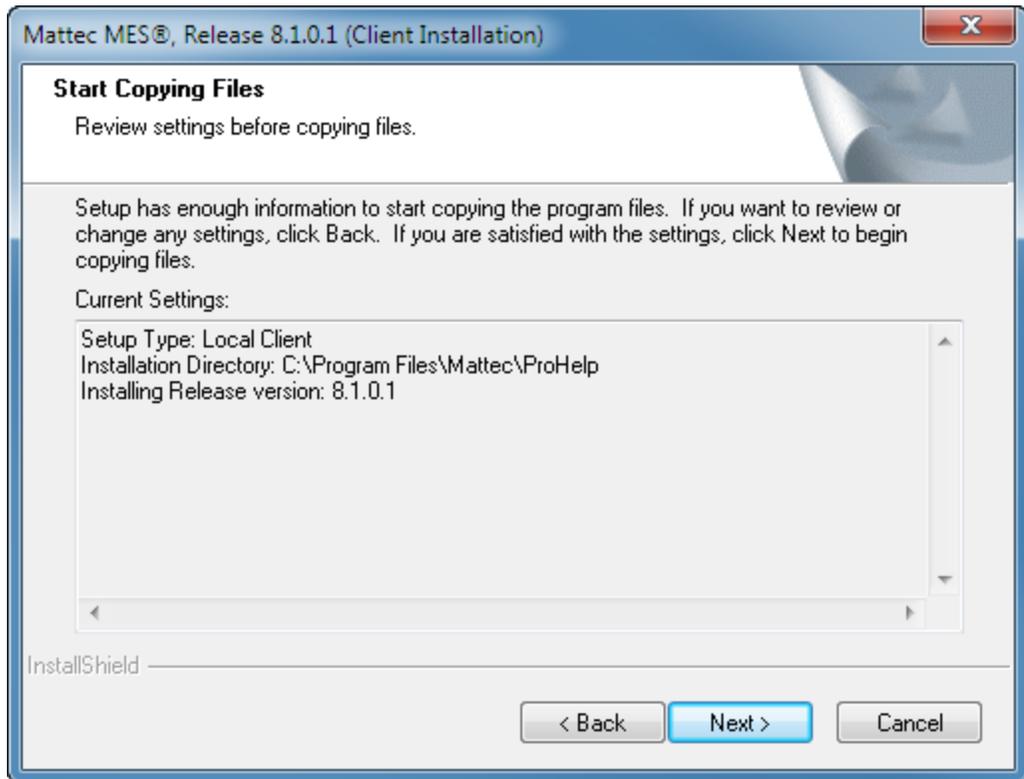
10. Review this summary screen and verify the information is correct, then choose **NEXT**.

Whether this is a new installation, or an upgrade from a previous version, the system should immediately register the files needed and a reboot of the system is not required.

11. 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.
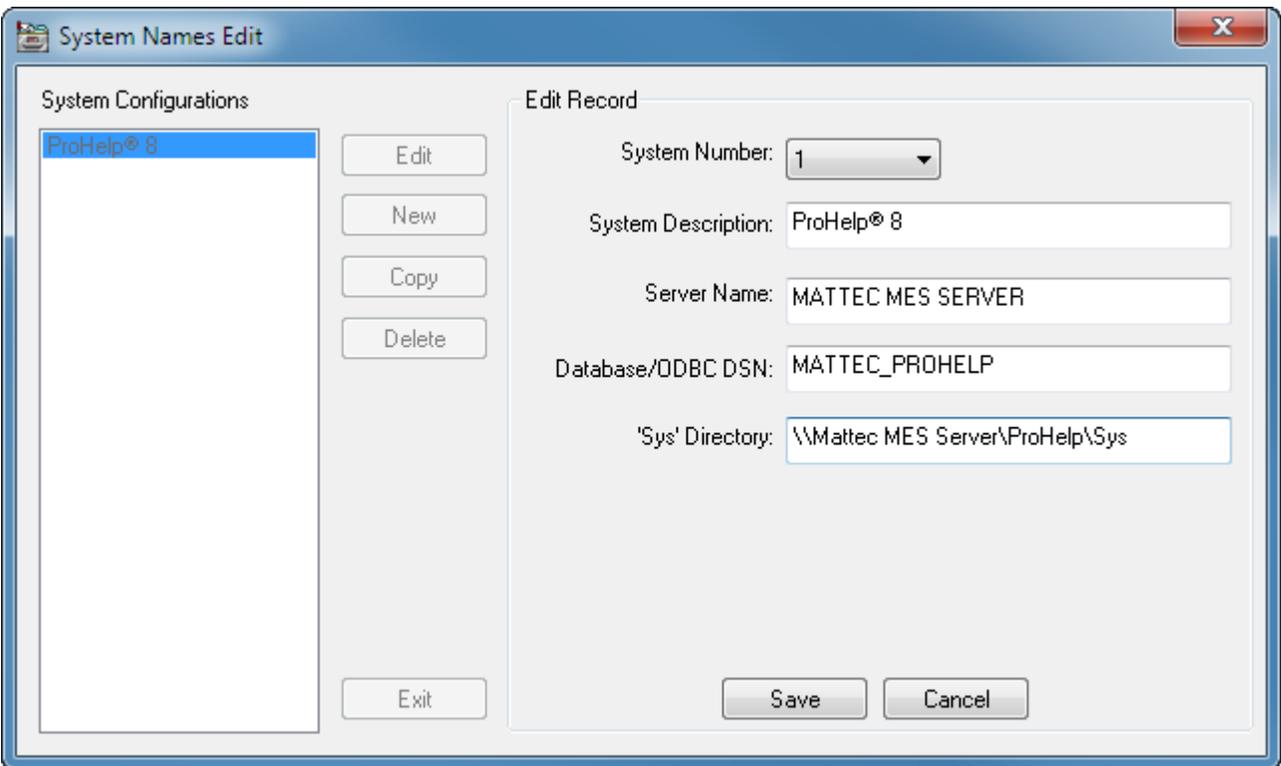

System Names Edit

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 Mattec MES system. The System Names Edit program is used to perform this configuration.

NOTE: 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:

1. Click on the Microsoft Windows Start Menu, click Programs, click Mattec, click Utilities, and select System Names Edit.
2. When prompted for the password, use the password **Cettam@1301**

The System Names Edit program will be displayed.

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

The following fields are available in the S ystem Names Edit screen:

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

4. To point the client to multiple Mattec MES 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.
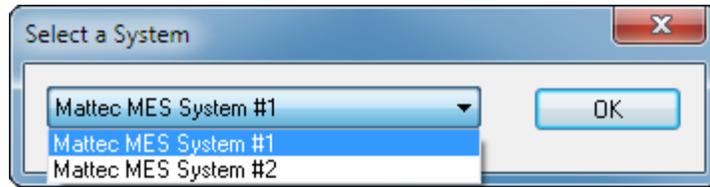
Additionally, in order to run the system reports inside of the Mattec software, you must run the Crystal Reports runtime engine. This is located on the same CD as the client installer.

To install this, follow the instructions below.

1. Run the program ..\Crystal Reports XI\setup.exe.

2. Answer all dialogues as appropriate.

At this point, the Mattec MES client procedure is complete.

If further assistance is needed when installing or configuring a Mattec MES client, please contact the Mattec Helpdesk.