

PMP Installation and Networking Instructions

This document provides:

- installation instructions for **New Users**
- installation instructions for **Existing Users** installing on a new computer
- network installation instructions.

Vista / Windows 7 Users: must be logged into your computer as an *Administrator*. Contact your tech or computer administrator for information on user accounts.

1. PMP Main Computer Installation

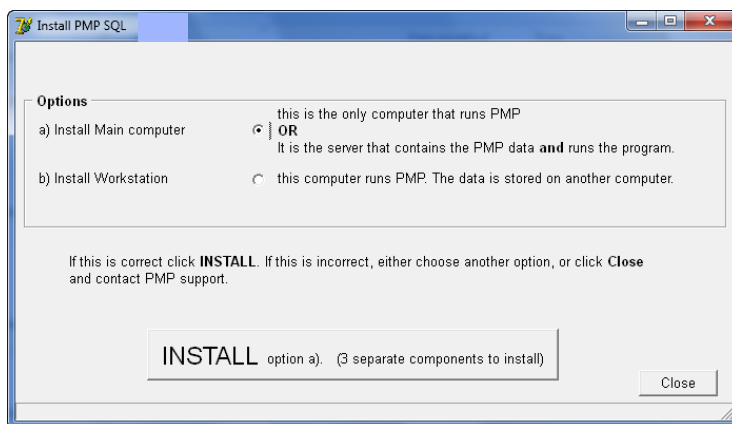
Double click the icon **My Computer** or locate **My Computer** from the **Start** menu.

Vista / Windows 7 Users: will see **Computer**.

Double click the **CD drive:**. It will be titled **PMP Version 6000**. Double click **New Install & Networking**, then **New Installation Program** or **New Installation Program.exe**.

Vista / Windows 7 Users: right click on **New Install** and choose *Run as Administrator*.

The *Install PMP SQL* screen will show **Options**. For single or stand alone computers and for servers, choose **Option a)**. Click **Install** and **OK** on the next screen. The installation process will install all required components and they will run one after the other based upon the selected option.



On the *Setup Firebird Database Server* screen click **Next**. Click **I accept the agreement**. Click **Next**. All the defaults for this installation are correct and modifications are not required. Continue to click **Next** until you reach the *Ready to Install* screen. Click **Install**, **Next**, then **Finish**.

The installation of the next component will start automatically. On the *PMP SQL Database* screen click **Next**. Continue to click **Next** through all the screens until you reach the *Completing the InstallAware Wizard for PMP* screen. Click **Finish**.

The installation of the next component will start automatically. On the *PMP SQL* screen click **Next** on the *Previous Version Uninstallation* screen, then **Next** on the *Welcome* screen. Click **Finish**.

Close all windows.

You should now see the icons **PMP SQL**, **Backup SQL**, and **PMPs Utilities** on your desktop.



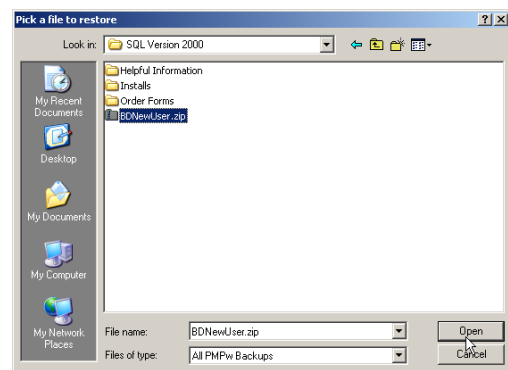
2. Add the Practitioners

Double click **Backup SQL**.

Vista / Windows 7 Users: right click on **Backup SQL** and choose *Run as Administrator*.

Click the **Restore** tab. Select **#8. Other**.

Pick a file to restore will appear.



- **New Users:** Click the down arrow to the right of **Look in:**. Locate and double click the CD drive which is named *PMP Version 6000*.

Double click the file called **BDNewUser.zip**.

On the *Restore* screen click **Live Database**, **Start Restore**, and on the *Please Confirm* screen click **Yes**.

- **Existing Users:** Click the down arrow to the right of **Look in:**. Locate and double click the backup file named **BMxxxxxx.zip** or **BDxxxxxx.zip**, where the x's stand for year, month, date.

On the *Restore* screen click **Live Database**, **Start Restore**, and on the *Please Confirm* screen click **Yes**.

3. Establishing Regional Languages and Options

Regional settings control the way PMP reads the date.

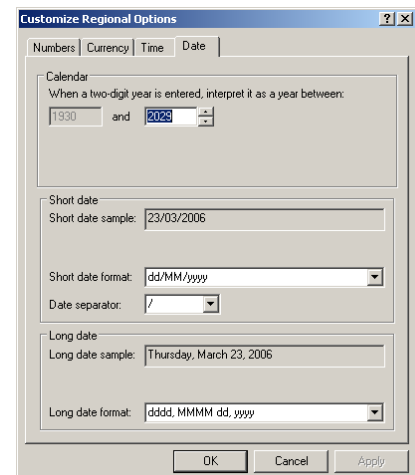
Click **Start, Settings, Control Panel, Regional and Language Options**.

Click the down arrow and select **English (United States)**. Click the **Customize** button, then the **Date** tab.

Look at the **Short date format**. It must read **dd/MM/yyyy** exactly.

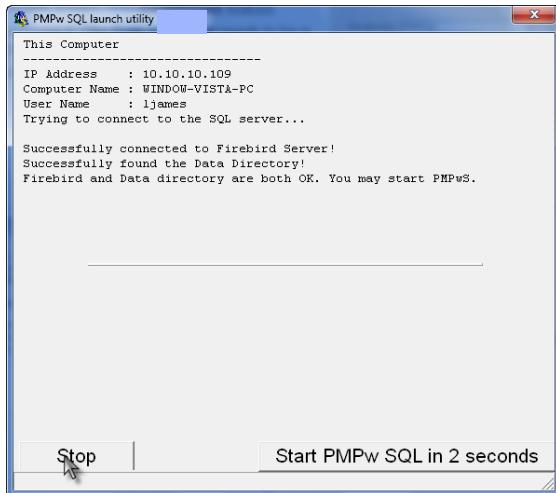
If not, click into the field and type it. The **Date separator** needs to be a **'/'** (forward slash). Change it if necessary. Click **Apply** followed by **OK**.

Close all windows to return to the Desktop.



4. Entering PMP

You may now enter PMP by clicking the **PMP SQL** icon on the desktop.

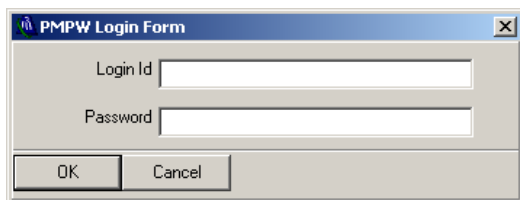


The SQL Launch screen will appear that allows for troubleshooting. Click the **Start PMPw** button before the countdown if you wish. The **Stop** button is used for networking.

A *PMPw Login Form* will appear requiring a *Login Id* and *Password*.

The default *Login Id* is **RS**. The default *Password* is **RS** for new offices.

Each person using PMP should have their own login ID and password. Please refer to the PMP manual for details on setting up security.

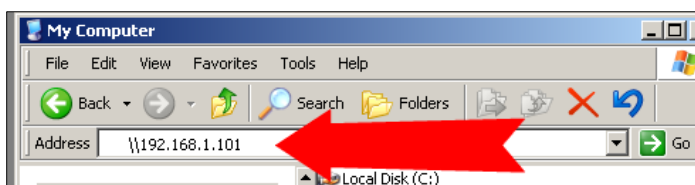


Note: Check the OCA website, www.chiropractic.on.ca or the CD for updates to PMP version 6000.

5. Networking PMP

The network needs to be setup prior to networking PMP. You may require a technical person to assist with your network setup to ensure that the computers are communicating with each other.

The network cannot be password protected. To test if the network is password protected go to **My Computer / Computer** on the workstation. In the *Address* bar type \\ followed by the IP address of the server computer. The IP address of the server computer can be found on the PMP Launch Screen on the server (see screen shot above). Press **Enter**. If you are prompted with a login and password the network requires a password and PMP cannot connect. Have your tech or someone knowledgeable remove the password requirement.



6. Server Setup

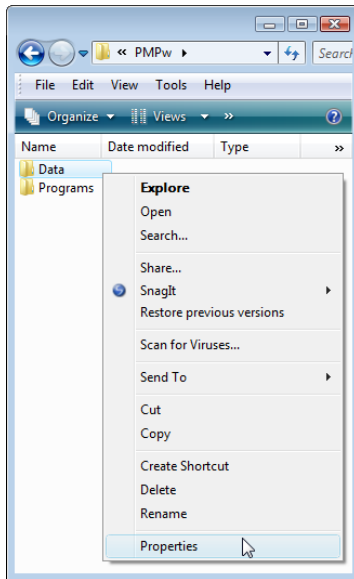
Sharing the PMP Data folder

Note: This option will not work for all PMP users. If you are unable to network using these instructions see page 4, **Alternative Location of the Data Directory** for another option.

Click **Start, My Computer**.

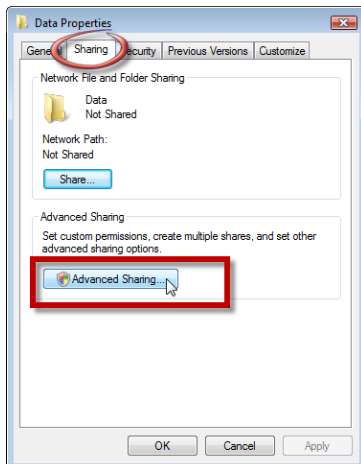
Vista / Windows 7 Users: will see **Computer**.

Double click **C:**, then **PMPw**. Right click **Data**. Left click **Properties** from the menu.



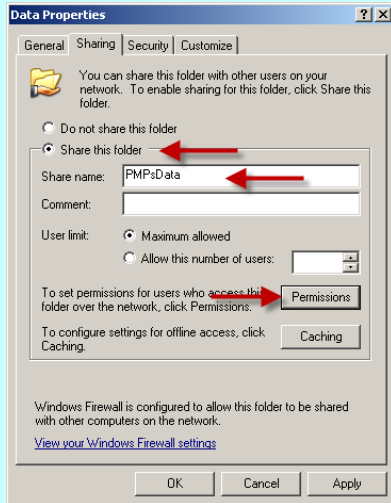
Click the **Sharing** tab.

Vista / Windows 7 Users: click **Advanced Sharing**.

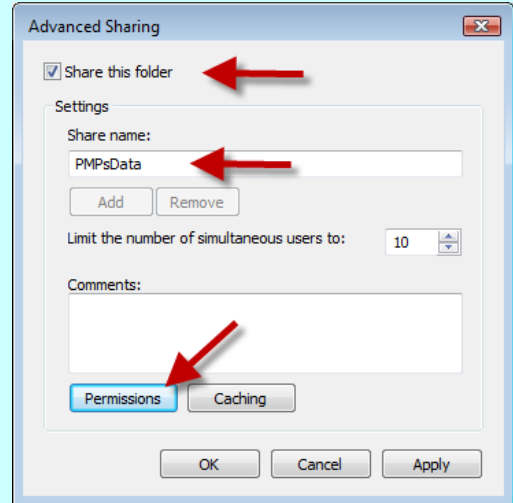


Choose either the right or left screen depending upon your operating system.

XP



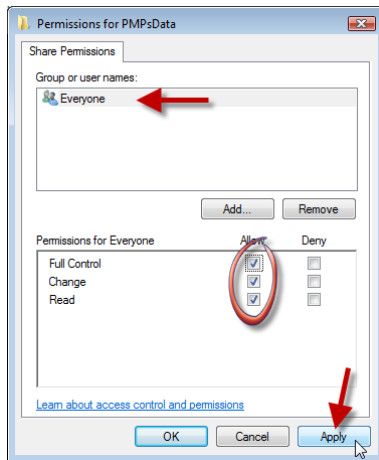
Vista / Windows 7



Choose **Share this folder**. Type **PMPDATA**, (note this field is NOT case sensitive). Click **Permissions** (**XP users may see Allow network users to change my files. Check mark this option**).

Choose **Everyone** and checkmark all selections under the **Allow** column. Click **Apply** then **OK**.

Vista / Windows 7 Users: click **OK** on the *Advanced Sharing* screen.



Close all windows.

Turn on the PMP Installation Utility

Click **Start, Patient Management Program – SQL, PMP Installation Utility**. If prompted to **Browse**, go to **My Computer, C drive, PMPw, Data, SQL, IServer**. Check the *Server HostName* and *IP Address* and write it down, you will need this information at the workstation(s).

Leave this installation utility open until all of your workstations are properly installed.

7. Installing PMP on the Workstation

Double click the icon **My Computer** or locate **My Computer** from the **Start** menu.

Vista / Windows 7 Users: will see **Computer**.

Double click the **CD drive:**. It will be titled **PMP Version 6000**. Double click the folder **Installations**, then **New Computer**. Double click **Install New Workstation** or **Install New Workstation.exe**.

Vista / Windows 7 Users: right click on **Install New Workstation** and choose *Run as Administrator*.

Click **Next** on the *Previous Version Uninstallation* screen, then **Next** on the *Welcome* screen. Click **Finish**.

Close all windows.

You should now see the icons **PMP SQL**, **Backup SQL**, and **PMPs Utilities** on your desktop.



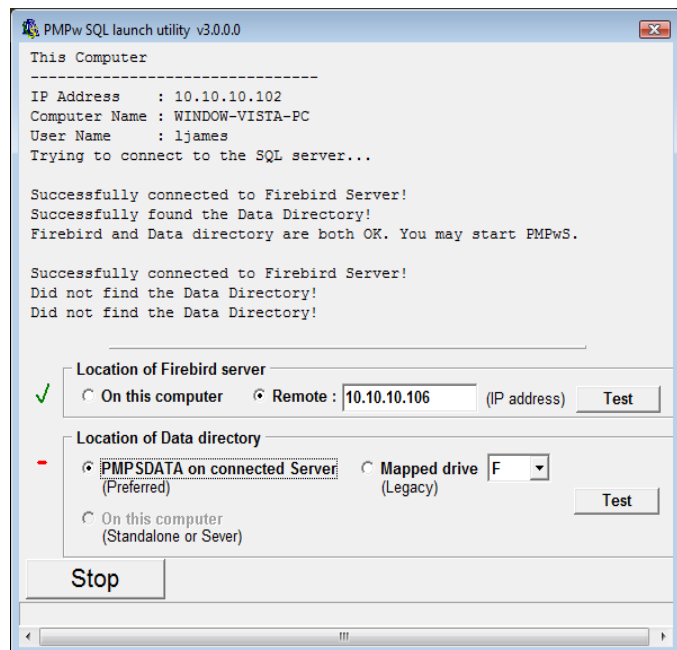
Connecting to the Server

Make sure that the PMP Installation Utility (step 6) on the server is still open. This utility sends out a signal to the workstations so that they can access the data located on the server.

On the workstation, double click the **PMP SQL** icon. Click the **Stop** button. The radio button under beside **Location of the Firebird server** should be selected on remote. Type the *hostname* in the field to the right. The field may also contain the *IP address* of the server but *hostname* is more reliable if your computer IP addresses get reassigned after rebooting the router. Click **Test**. You should see a green checkmark if the firebird server can be found at the address given.

Make sure the radio button beside **PMPDATA** is selected under **Location of the Data directory**. Click **Test**. You should see a green checkmark if the PMP Data is located.

Note: *If you do not get a checkmark beside the Location of the Data directory you may need to manually map a drive to the server. See below for detailed instructions.*



Alternative Location of the Data Directory

If you do not get a checkmark beside the Location of the Data directory follow these instructions to manually map a drive to the server.

Sharing C:\ drive

On the server or main computer click **Start, My Computer.**

Vista / Windows 7 Users: will see **Computer.**

Right click **C:**

A menu will appear. Click **Sharing and Security.**

Click **Share this folder**

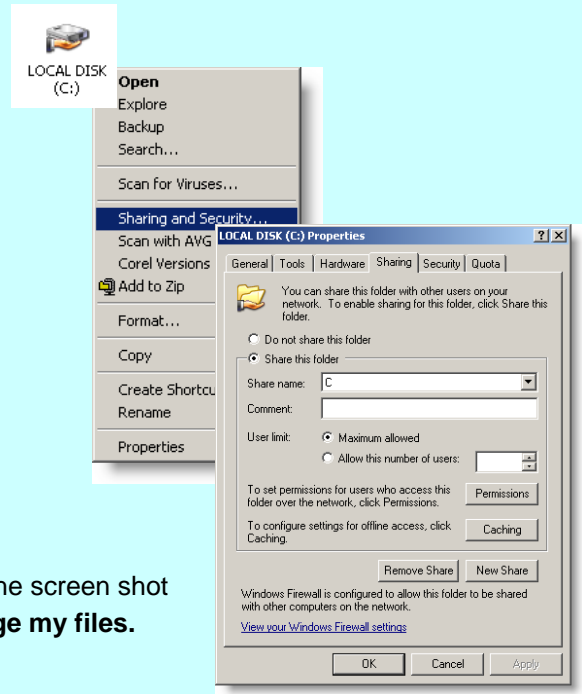
Make sure the share name is **C** or **C\$**

Click **Maximum allowed** beside **User limit**

Click **OK**

Close all windows.

Note: If your sharing screen does not appear as the screen shot on the right check **Allow network users to change my files.**



Alternative Location of the Data Directory (continued)

Map the Network Drive

On the workstation right click **Start, Explore**
Click the **Tools** menu, **Map Network Drive.**

Choose an unused drive letter under **Drive.**

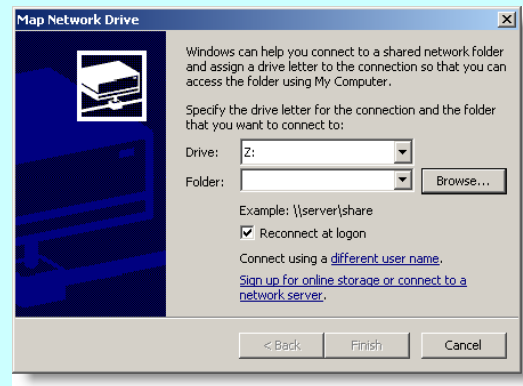
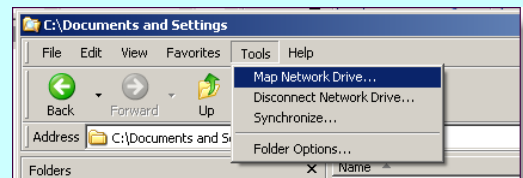
For the folder click **Browse...**

You will now need to locate the **C:** drive (root) on your server.

Make sure **Reconnect at logon** is check marked.

Click **Finish.**

Close any open screens.



A note about Firewalls

Firewall interference is usually due to firewalls detecting PMP as a potential threat. Instructions for setting up exclusions in Microsoft Firewall, Norton, and McAfee are available on this CD, the OCA website at www.chiropractic.on.ca, or can be faxed / emailed to you.

Should you have any questions please call the support line at **416-860-7199 / 1-800-561-7361**
or email support@chiropractic.on.ca