ProSteward Online

CD-ROM Installation Instructions

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Installing the ProSteward® Online CD-ROM Application

The Online CD-ROM application is available as part of the ProSteward® Online module to users that do not have network access. It is flexible in its creation and installation procedures to allow it to achieve its many demands.

The ProSteward Online CD-ROM is a client application that can be installed on local workstations. With the development of the ProSteward Online CD-ROM application, a new CD-ROM Installer Wizard was introduced to allow for a more user friendly and flexible installation process. The new wizard, launched by the installer.exe file, replaces the previous CD-ROM Application Installer window with a series of useful installation windows. Based on the installation type, the user may or may not be able to skip certain steps of the installation process.

For Window 7 and Vista operating systems, you must be an administrator on the computer to install the CD-ROM application. To install as an administrator be sure to right click on the installer.exe and select the option to "Run as an Administrator". In cases where the installer was accessed by way of clicking on the Onlinecd.exe file, exit the installer, and restart the installer as an administrator. The CD-ROM application may not install correctly if this step is not taken.

Upon launching the installer.exe file, the user is taken to the CD-ROM Installation Options Window discussed in further detail in the following sections. This window allows the user to launch the CD-ROM Application Installer, as well as to view this document, browse the Online Web site, or view the files located on CD-ROM Disk 1. Should the user wish to continue with installation, there are several options available to the user, including the ability to install the CD-ROM to the user's computer. In doing so, a shortcut will be placed on the user's desktop and both database driver and disk location information will be added to the computer's registry for quick access to the application. The user will also have the option to copy application files to a local folder so they can be quickly accessed without network traffic interference. This step is necessary if the user is running a multi-disk CD-ROM set with Disk 1 located on the network or on removable media. Additionally, the user has the option of copying data files from the CDs, in addition to installing the application files.

Alternatively, the user may choose to run the Online CD-ROM a single time without installing the application by clicking the onlinecd.exe file. When the Online CD-ROM executable is launched, the application version is checked to determine if the CD-ROM application has previously been installed. If the application doesn't detect a previous installation, or the version of the application trying to be run is different from the one installed, the user will have the option of installing the current version or running it a single time. If the user decides to run the application a single time, only the database driver information will be verified and written to the registry before launching the application. If drive location information is needed the user will be prompted to provide the information.

All of the available installation options are discussed in further detail below.

CD-ROM Application Installer Window Overview

Upon launching the installer.exe file, the user is taken to the CD-ROM Installation Options Window. This window, as shown below, allows the user to launch the CD-ROM Application Installer, view this Installation Guide, browse the Online Web site, or view the files located on CD-ROM Disk 1.
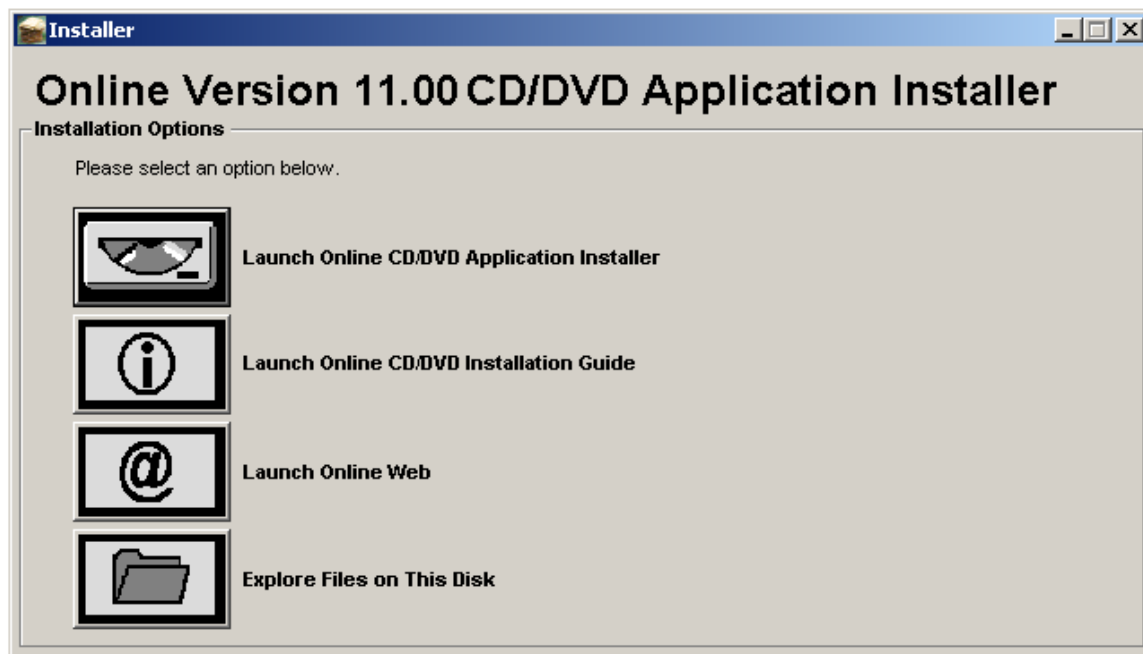
If the user selects "Launch the Online CD-ROM/DVD Application Installer", there are several options available to the user. The available installation options are discussed in further detail below.

Installation Options

At a high level, the contents of CD-ROM application are made up of application files, database files, and document files. Application files are the files that are responsible for displaying the user interface and executing the application as the user makes requests. The database file is where all of the document location and product record information is stored.   Document files store the documents in a compressed format outside of the database file to allow them to be placed on additional media if the contents of the entire application do not fit on a single media. The database files and the document files are referred to as data files. Regardless of the method employed, the user must have the following access:

- Write/Update/Read access to the HKLM or HKCU section of the registry.   The installation process will first try to write to the HKLM section of the registry. If the user does not have write access to the HKLM portion of the registry entries in the HKCU section be used.

o   If multiple users need to be able to access the CD-ROM application, a user with access to the HKLM portion of the registry should be the one to install/run the CD-ROM.   This will ensure that all information needed to run the CD-ROM application is available to any user that logs onto the machine.

o   If the application is installed to the HKLU section of the registry, the CD-ROM application will be available only to the user that was logged in when the application was installed.

o   The CD-ROM shortcut will be available only to the user that was logged in when the application was installed.

- Write access to the user's %TEMP% drive. This is used to write a temporary copy of the document during the time it is being displayed as well as where the CD-ROM log file is stored.

The Installer application is recommended to those that use the CD-ROM application on a regular basis and access the files from the same location each time. As discussed, the installation process will write entries into the PC's registry to store the location of each of the disks that make up the CD-ROM. By clicking the installer.exe file, the Online CD-ROM Installer will launch and allow the user the option to install the application to their computer. The installation processes may or may not copy the application files locally. However, at the completion of the installation, the location and associated contents of the entire CD-ROM application will be stored for future use. To avoid network traffic, all application files must be copied to the user's machine if running disk one from a network location. Similarly, all application files must be copied locally when Disk 1 of a multi-disk set is being run from removable media.

There are three installation types available in the Online CD-ROM Installer: **Minimal Install, Complete Install, and Custom Install.**

<u>**Minimal Install**</u>
This installation option installs only application files, and copies the database file only when the system option CD_MINIMAL_INSTALL_COPY_DB is turned on.

This installation type is generally used to **run the CD-ROM application off a single CD-ROM drive**. This installation option is available to users that have a single CD-ROM drive and want to run the CD-ROM without having to copy the entire contents of the CD-ROM to their workstation or a network location. NOTE: This option will provide the slowest response time due to the amount of times the user needs to change the disks and the delay of the CD-ROM drive.   If possible, copy Disk 1 to a local or network location and only run the subsequent disks from the removable media drive.

When disk files are located on the user's hard drive, it is not necessary for the installer to install application files to an application directory as they are already located locally on the user's machine. When the user selects this option, the location of each disk is written to the registry and installation is complete. No application files are installed.

When disk files are located on the network or on removable media, it is necessary for the installer to install application files locally onto the user's machine. (See "Multiple User Connectivity" at the end of the guide for additional instructions.) When the user selects this option, the user is

prompted to enter a location where application files will be installed. During installation, application files are installed to the specified location, the application data directory is written to the registry, and disk location information is written to the registry.

If disk files are located on removable media and the CD_MINIMAL_INSTALL_COPY_DB system option is turned on, the installer will also copy the database file to the specified application directory, and store its directory location in the registry. When this occurs, the user will not have to repeatedly switch Disk 1 back into the disk drive when viewing documents located on other disks in the CD-ROM set.

See below for step-by-step instructions on how to perform a Minimal Install.

<u>Complete Install</u>
This installation option copies data files in addition to installing application files.

This installation type is generally used to **run the CD-ROM from a set of local folders.** This installation option is available to users that have access to the full contents of the CD-ROM from a set of local folders.   If the user has enough disk space on their personal computer, it is possible to copy the contents of each of the CD-ROMs to a local folder on their PC. This will allow the CD-ROM to run without experiencing any network traffic or delay in accessing a CD-ROM drive.

When the user is copying data files locally on the user's hard drive, it is not necessary for the installer to install application files to an application directory as they will already be located locally on the user's machine after data files are copied to the machine. When the user selects this option, the user is prompted to enter a location where data files will be copied to (on the user's machine). During installation, data files from each disk are copied to the specified location, and the new file location for each disk is written to the registry. Installation is complete, and no application files are installed.

When the user is copying data files to a directory located on the network, it is necessary for the installer to install application files locally onto the user's machine. (See "Multiple User Connectivity" at the end of the guide for additional instructions.) When the user selects this option, the user is prompted to enter a location where data files will be copied to (on the network), followed by a prompt to specify an application directory (on the user's machine) where application files will be installed. During installation, data files from each disk are copied to the specified location, the new file location for each disk is written to the registry, application files are installed to the directory specified, and the application directory is written to the registry.

See below for step-by-step instructions on how to perform a Complete Install.

<u>Custom Install</u>
This installation options allows the user some flexibility with installing application files and copying data files. For example, the user can opt to install application files to an application directory even if disk files are already located locally on the user's machine. Also, instead of the installer determining the location of each disk in the CD-ROM set, the user specifies the location of each disk via the "Configure Disk Locations" Window. The Disk Num and Type columns of this window will be pre-populated based on the information written to the DISKMAPPING table during the CD-ROM creation process. These columns indicate to the user how many CD-ROMs make up the application, as well as what type of data is stored on each of the disks. For each

disk, the Location column must be filled in by the user so that the application will know where to look for the specific disk when the CD-ROM is run.

When the user selects this option, the installer asks the user if data files should be copied. If the user selects yes, the user must specify the location where data files should be copied to. If the user specifies a data file directory located on the network, the user **must** then specify a local application data directory where application files will be installed to. If the user specifies a data file directory located on the user's machine, the user is asked whether or not application files should be installed. If the user opts to install application files, the user is then prompted to select the application data install directory. After the installer gathers data file and application file preferences, the user is prompted to specify the location of each disk in the CD-ROM set. Installation continues as outlined above, depending on whether or not data files are being copied, and whether or not application files are being installed.

If disk files are located on removable media, and the CD_MINIMAL_INSTALL_COPY_DB system option is turned on, and application files are being installed, the installer will also copy the database file to the specified application directory, and store its directory location in the registry. When this occurs, the user will not have to repeatedly switch Disk 1 back into the disk drive when viewing documents located on other disks in the CD-ROM set. (If disk files located on the network, see "Multiple User Connectivity" at the end of the guide for additional instructions.)

See below for step-by-step instructions on how to perform a Custom Install.

1. **Minimal Install**

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1.1. Locate the **"Installer.exe" file** on the CD-ROM Disk 1 (from files on the Hard Drive or Network, or from Removable Media). Double click on the file.

1.1.1. **If the application has already been installed,** the following error message will be displayed. It will tell you if the version installed is the same version or a previous version of the application. If the user selects "Yes", they will be brought to the Installer window. If they select "No", the process will stop.
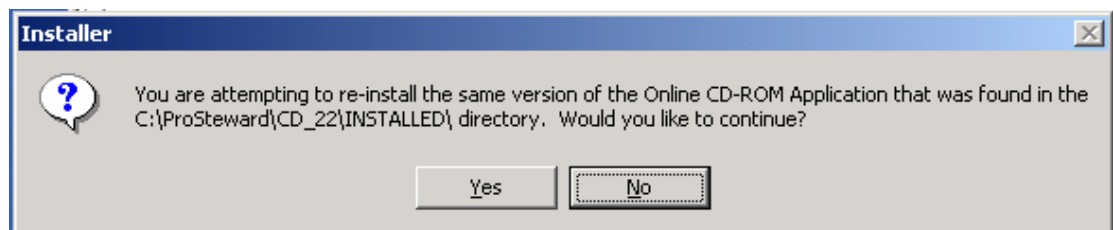

1.2. Once the user has initiated the installation process, the following window will appear. Click the icon labeled, **"Launch Online CD/DVD Application Installer."**

NOTE: Clicking the "Launching the Online Web" button will take the user to the URL path set in the CD_ONLINE_WEB_URL system option.

1.3. The "Welcome to CD Application Installer" Window will appear as shown, indicating the location of the Disk 1, the creation date of that disk and number of disks for the created CD-ROM application. Click the **Next** button.
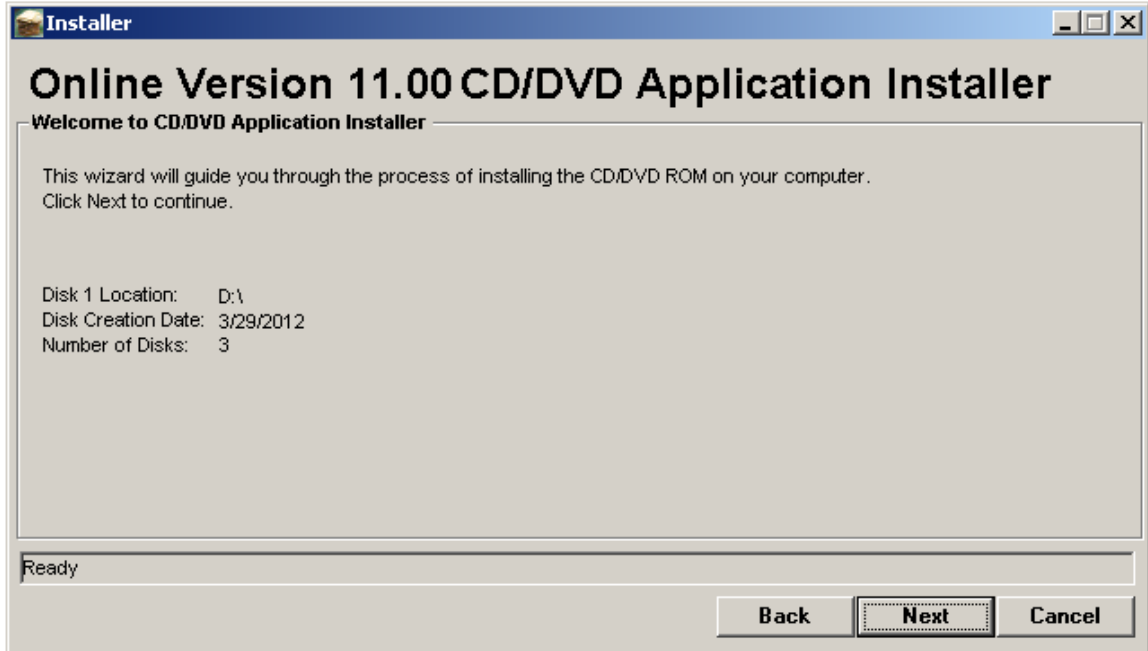

1.4. The "Installation Type" Window will appear with the Installation Type (Minimal, Complete and Custom) options shown. Select the **Minimal** Installation option. Click the **Next** button.
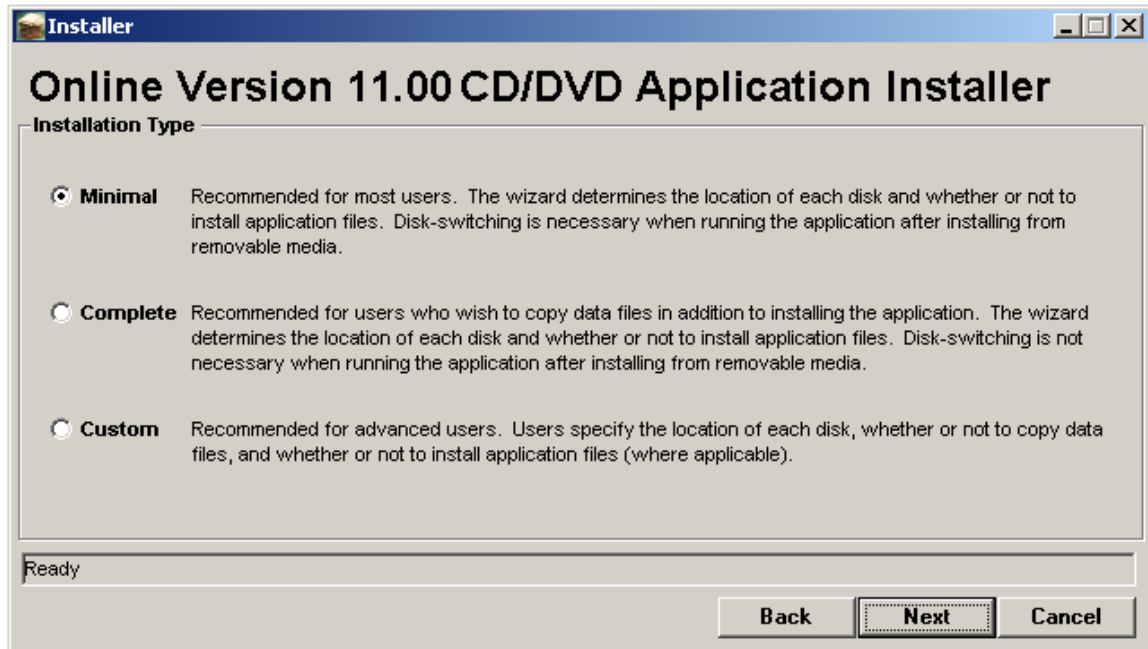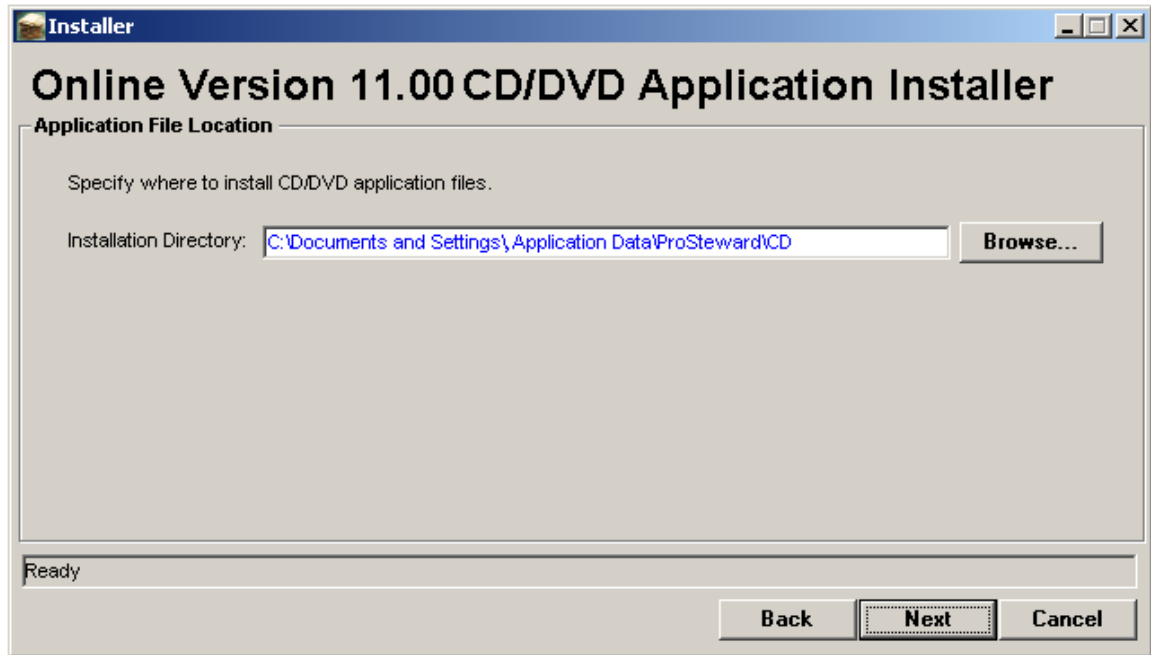
1.5. **If Installing from Hard Drive**, the User will be taken straight to the "Installation Review" Window. The window will indicate the Installation Type as 'Minimal' and that the application and data files will not be copied. Click the **Finish** button to complete the Minimal Installation.
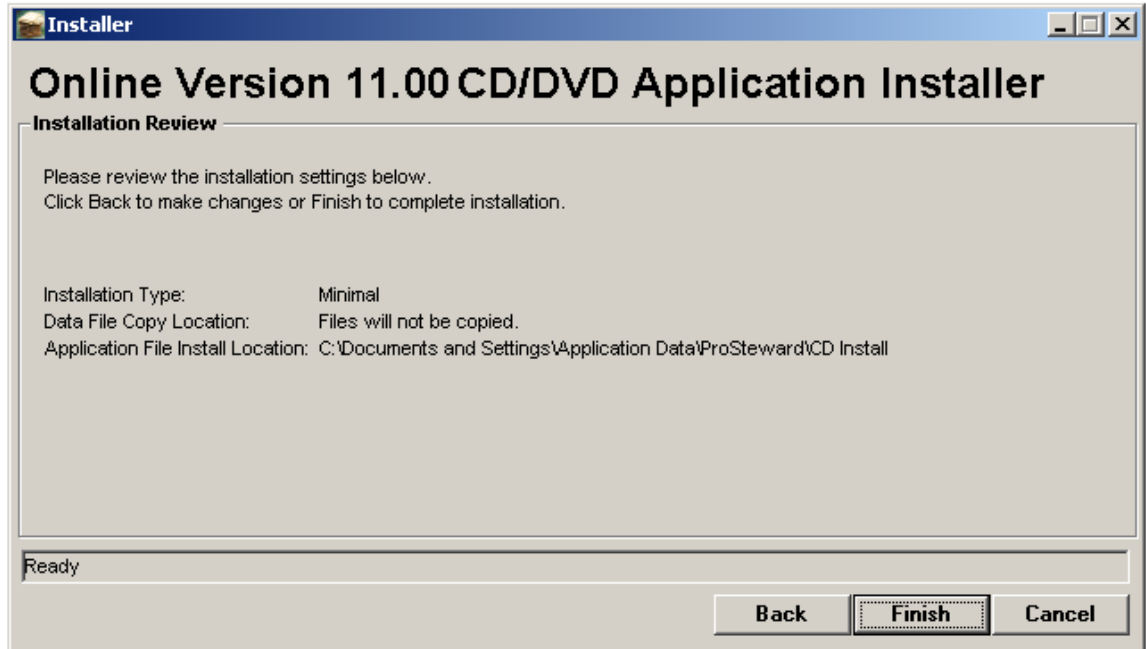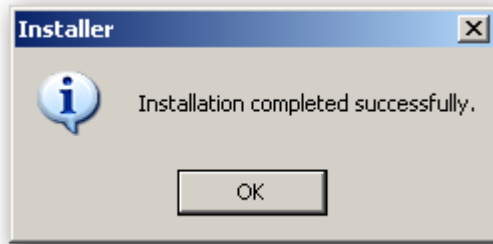

1.5.1. **If Installing from Removable Media or Network,** application files must be installed locally. Before the "Installation Review" window opens, the "Application File Location" will open, and the User must enter an **Installation Directory** to install application files to. Specify the file location by clicking the Browse button and specify the location the application files should be installed. This must be on the user hard drive but needs to be a UNIQUE folder location, with no special characters in it. Spaces are acceptable. Click the **Next** button.

1.5.2. The "Installation Review" Window opens. The window will indicate the Installation Type as 'Minimal' and that the data files will not be copied. The window will specify the directory that the application files will be installed to. Click the **Finish** button to complete the Minimal Installation.
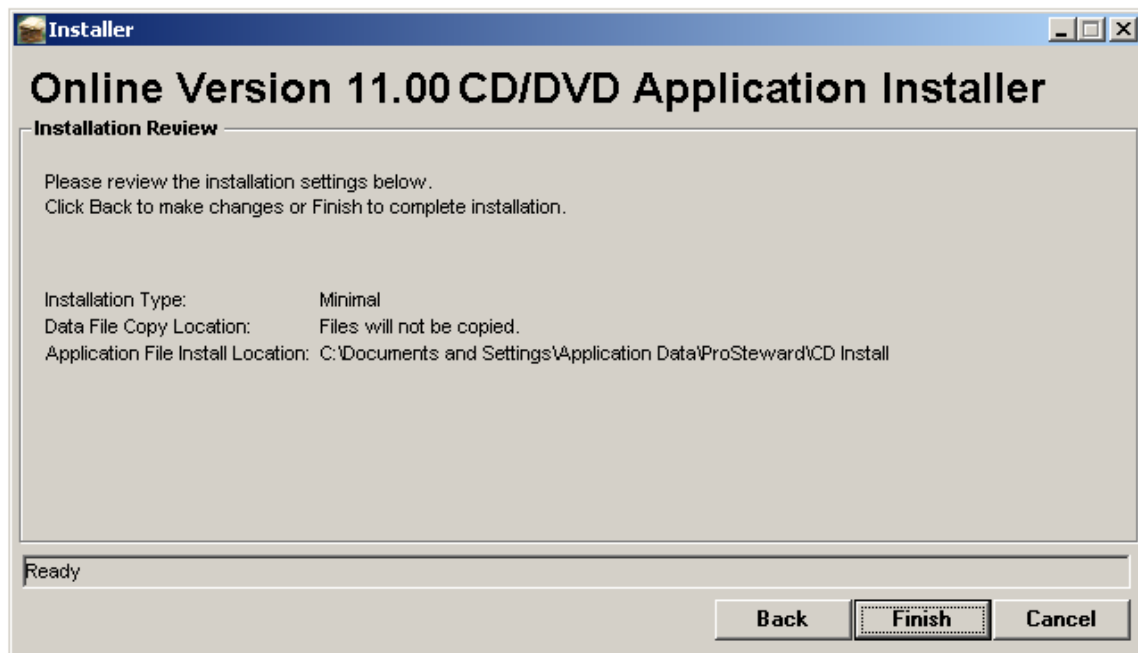
1.5.2.1. After a successful installation, the following message is displayed: "Installation completed successfully. (OK)"

2. Complete Install

2.1. Locate the **"Installer.exe" file** on the CD-ROM Disk 1 (from files on the Hard Drive or Network, or from Removable Media). Double click on the file.

2.1.1. **If the application has already been installed to your machine**, the following error message will be displayed. It will tell you if the version installed is the same version or a previous version of the application. If the user selects "Yes", they will be brought to the Installer window. If they select "No", the process will stop.
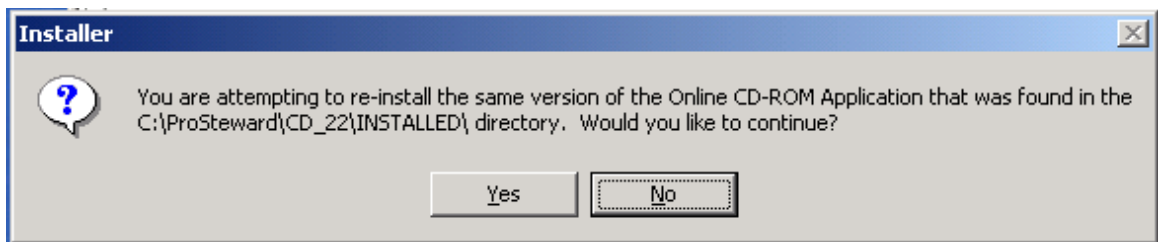

2.2. Once the user has initiated the installation process, the following window will appear. Click the icon labeled, **"Launch Online CD/DVD Application Installer**."
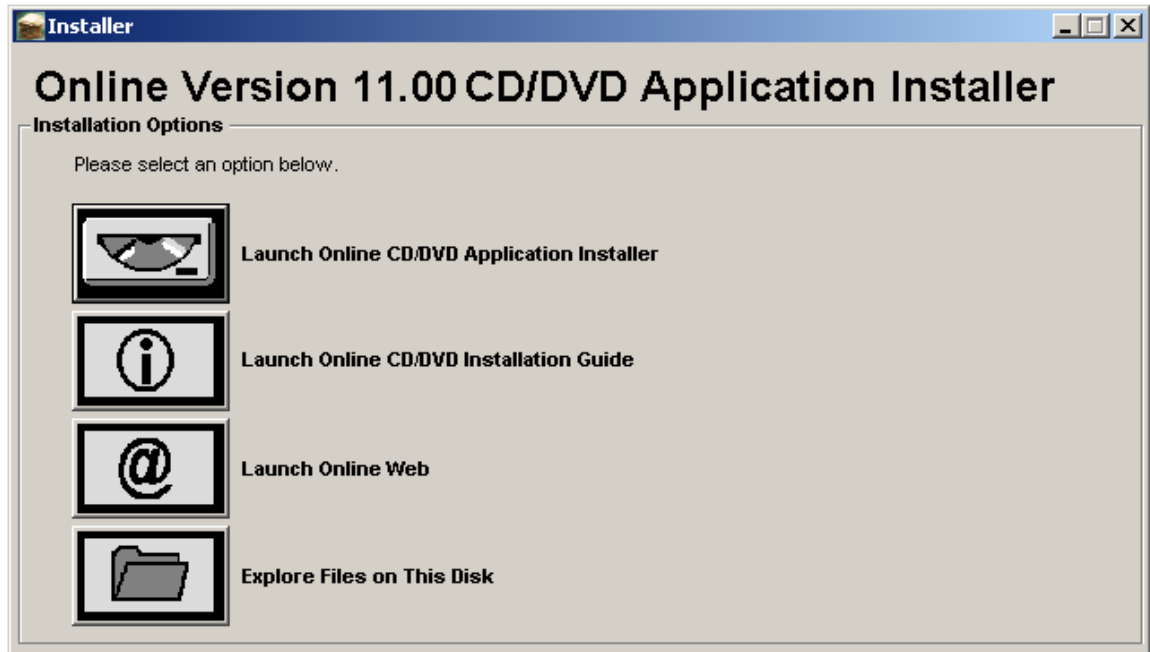
2.3. The "Welcome to CD Application Installer" Window will appear as shown, indicating the location of the Disk 1, the creation date of that disk and number of disks for the created CD-ROM application. Click the **Next** button.
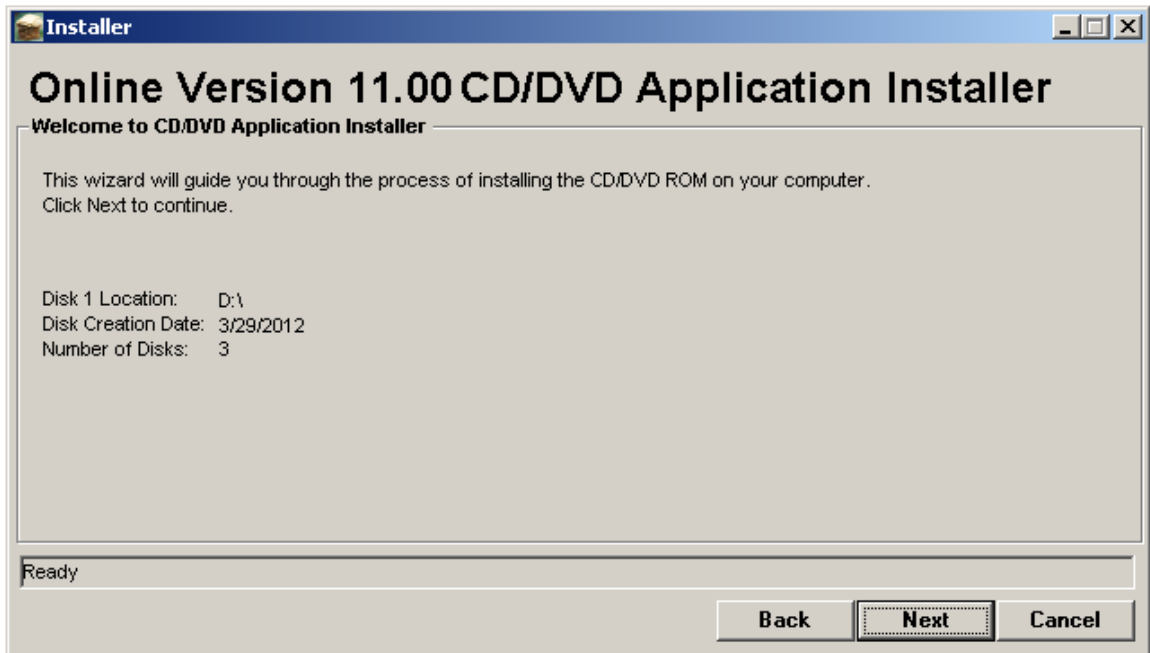
2.4. The "Installation Type" Window will appear with the Installation Type (Minimal, Complete and Custom) options shown. Select the **Complete** Installation option. Click the **Next** button.
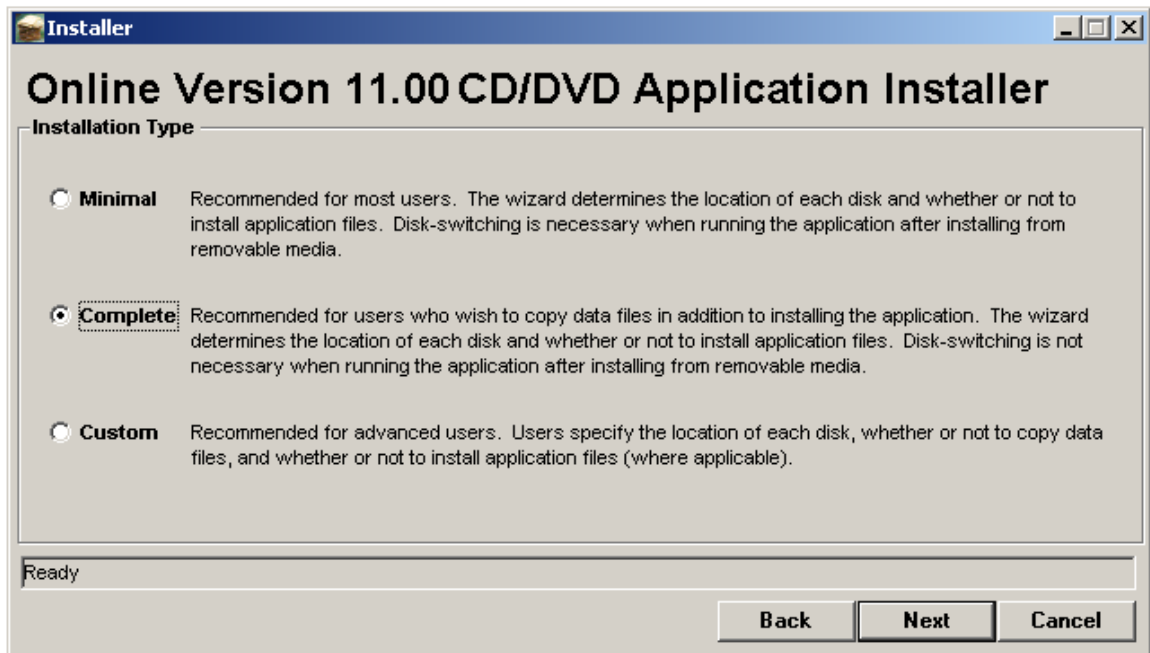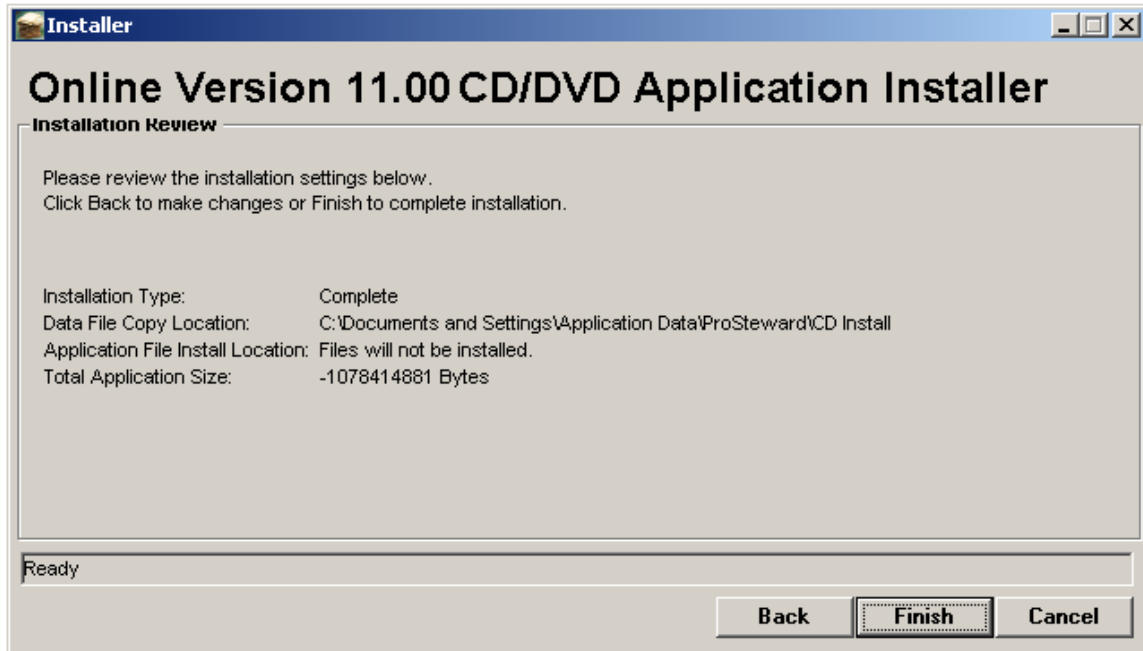
2.5. The "Data File Location" Window will appear. Specify the **file location** by clicking the Browse button and specify the location that the data files should be installed. This can be on the user's hard drive or a network drive, but needs to be a UNIQUE folder location, with no special characters in it. Spaces are acceptable. Click the **Next** button.
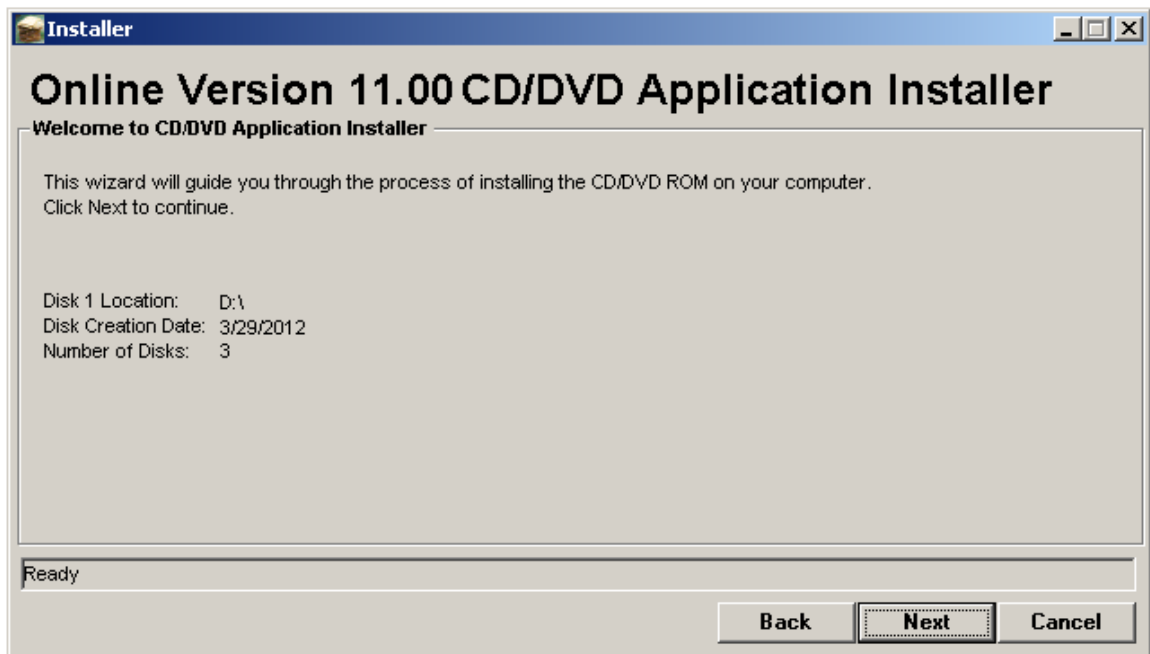

2.6. **If Data Files are installed to the Hard Drive**, the User will be taken to the "Installation Review" Window. The window will indicate the Installation Type as 'Complete' and
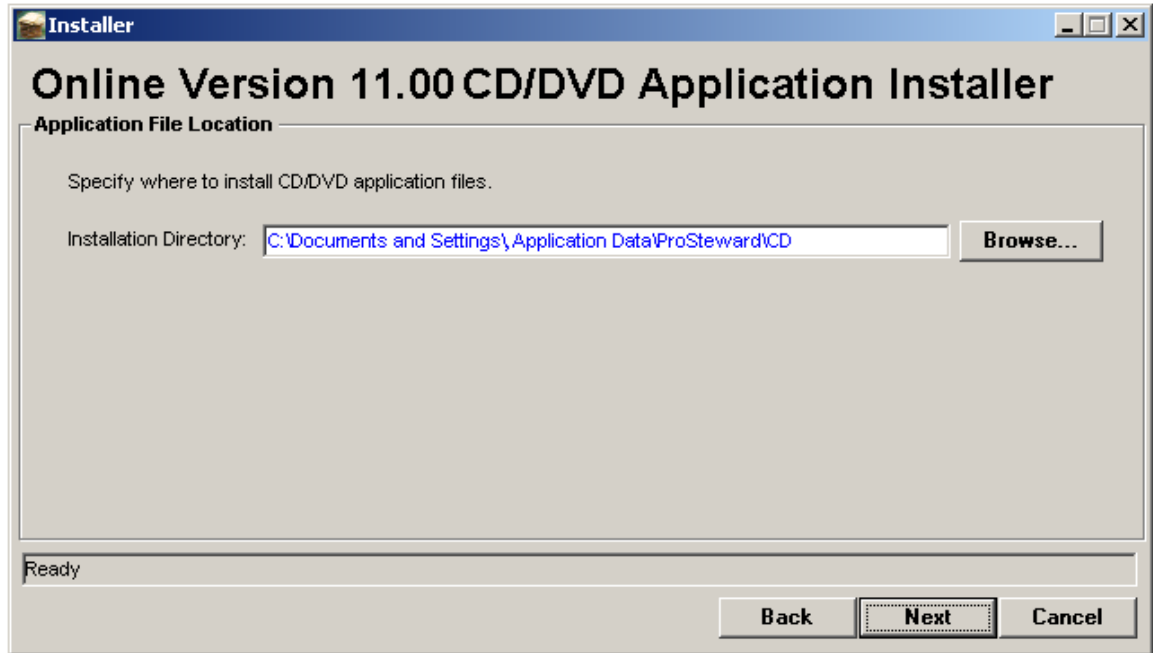
that the application files will not be installed (the app files are automatically copied over with the Data Files to the location specified on the "Data File Location" window). The Data File Copy Location will display the directory that the User specified. Click the **Finish** button to initiate the Complete Installation.
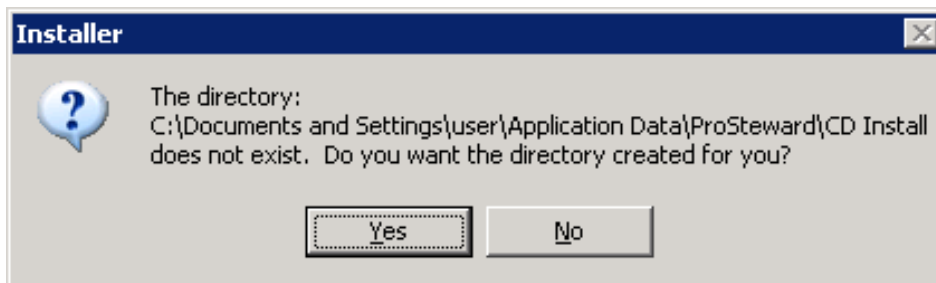

2.6.1. Files are copied to the selected location and the Registry is updated. After a successful installation, the following message is displayed: "Installation completed successfully. (OK)"
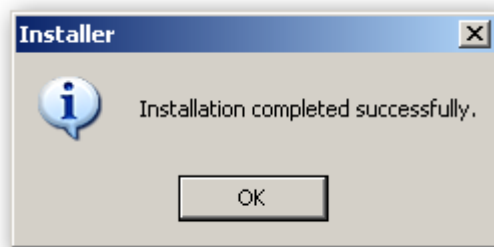
2.6.2. **If Data Files are installed to a Network location,** application files must be installed locally. Before the "Installation Review" window opens, the "Application File Location" will open, and the User must enter an **Installation Directory** to install application files to. Specify the file location by clicking the Browse button and specify the location the application files should be installed. This must be on the user hard drive and needs to be a UNIQUE folder location, with no special characters in it. Spaces are acceptable. Click the **Next** button.

NOTE: If the file location does not exist the following message box will appear to create prompting to create the location as shown below.

2.7. The "Installation Review" Window will appear, indicating Installation Type as 'Complete', the Data File Copy Location, Application File Install Location, and the Total Application Size. Click **Finish** to complete the installation.

2.7.1. Files are copied and installed to the selected locations and the Registry is updated. After a successful installation, the following message is displayed: "Installation completed successfully. (OK)"
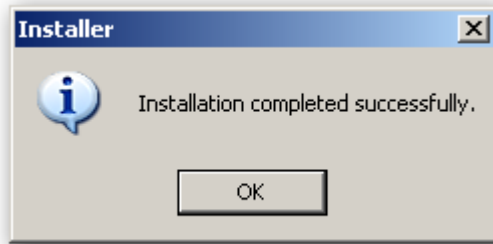
3. Custom Install

3.1. Locate the **"Installer.exe" file** on the CD-ROM Disk 1 (from files on the Hard Drive or Network, or from Removable Media). Double click on the file.

    3.1.1. **If the application has already been installed to your machine**, the following error message will be displayed. It will tell you if the version installed is the same version or a previous version of the application. If the user selects "Yes", they will be brought to the Installer window. If they select "No", the process will stop.
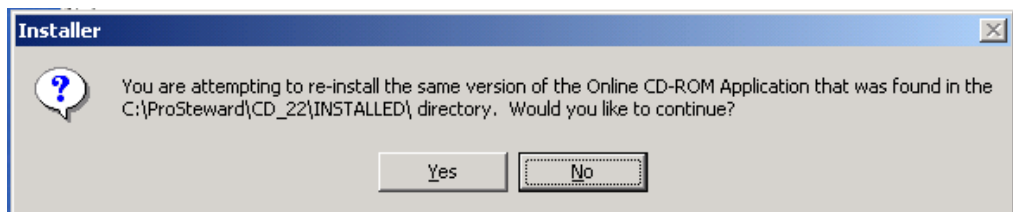
3.2. Once the user has initiated the installation process, the following window will appear. Click the icon labeled, **"Launch Online CD/DVD Application Installer**."
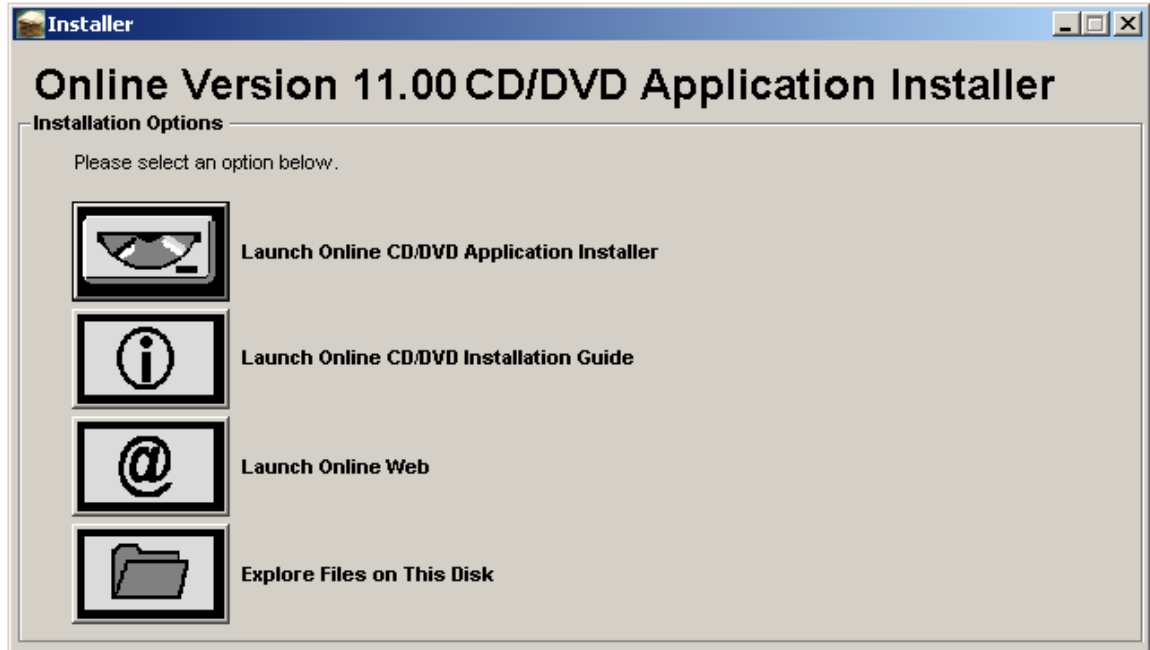
3.3. The "Welcome to CD Application Installer" Window will appear as shown, indicating the location of the Disk 1, the creation date of that disk and number of disks for the created CD-ROM application. Click the **Next** button.
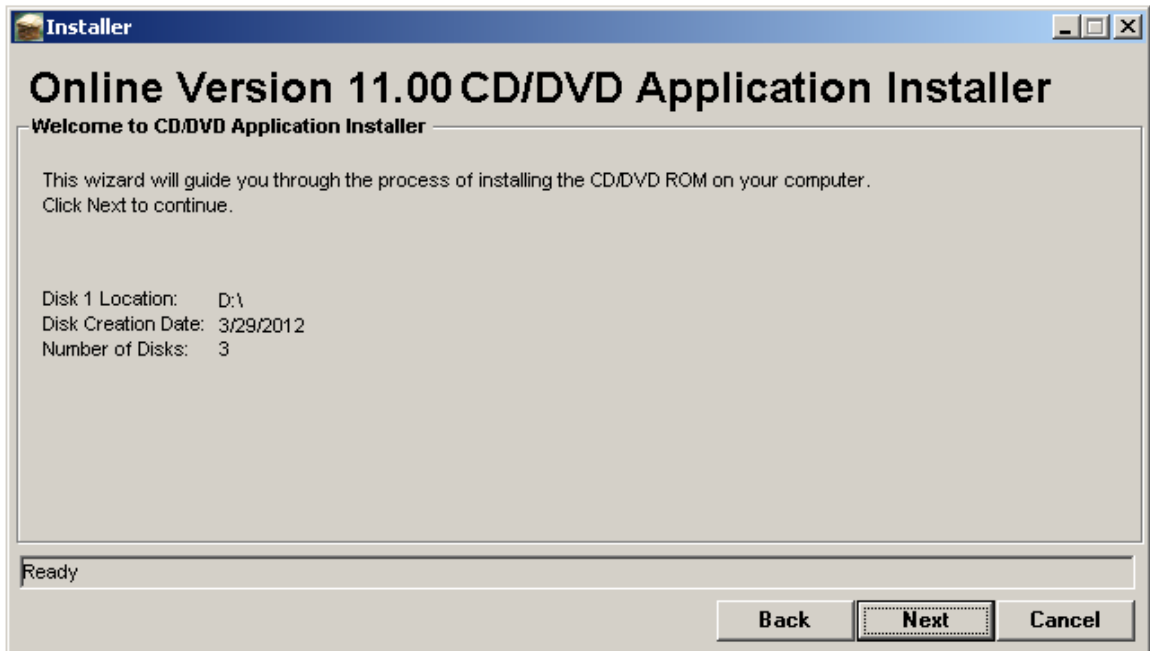
3.4. The "Installation Type" Window will appear with the Installation
Type (Minimal, Complete and Custom) options shown. Select the **Custom** Installation
option. Click the **Next** button.
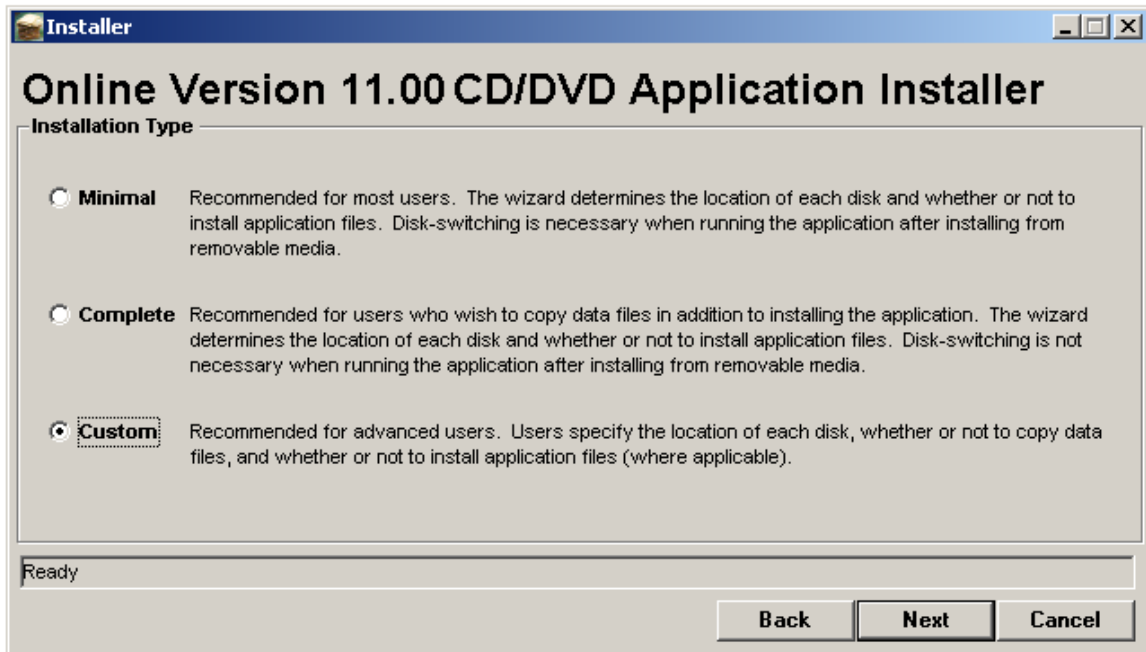
3.5. The "Install Option (Data Files)" window will appear. The user can select "No, do not
copy data files", or "Yes, copy data files".
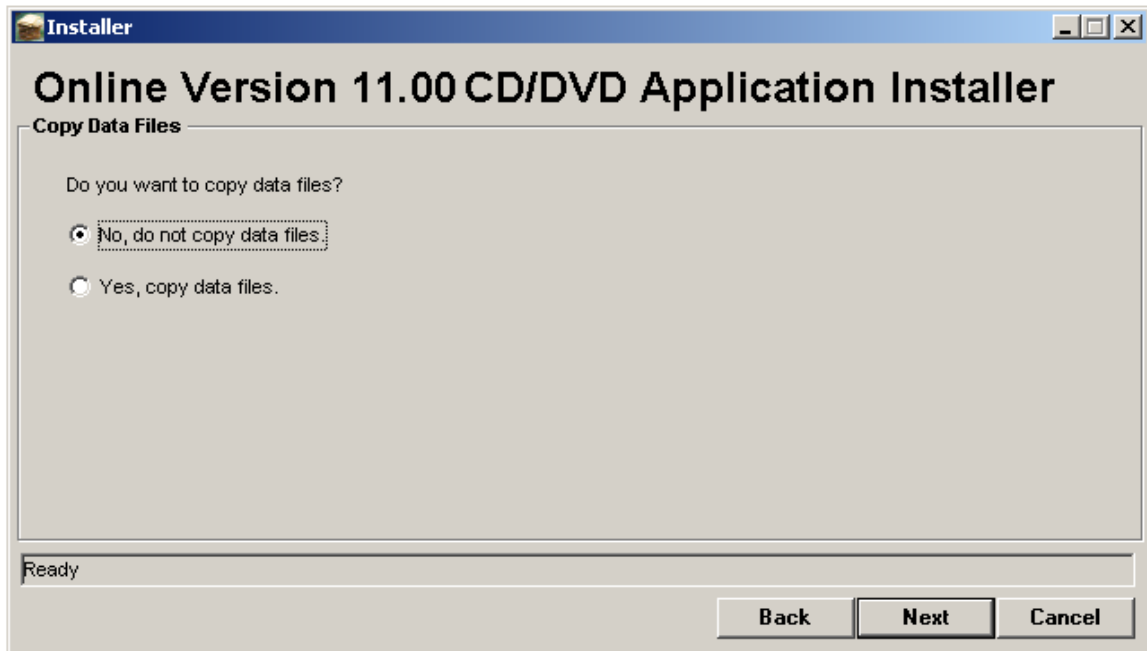
3.6. If **Yes** is selected, the "Data File Location" Window will appear. Specify the **file location** by clicking the Browse button and specify the location that the data files should be installed. This can be on the user's hard drive or a network drive, but needs to be a UNIQUE folder location, with no special characters in it. Spaces are acceptable. Click the **Next** button.

    3.6.1.If **No** is selected and the user is **installing from a Hard Drive**, the "Data File Location" Window will be skipped and the User will be taken to the "Install Option (Application Files)". See Step 3.6.3. If **No** is selected and the user is **installing from a Network or Removable Media**, the "Application Files Location" window will open. See Step 3.7.
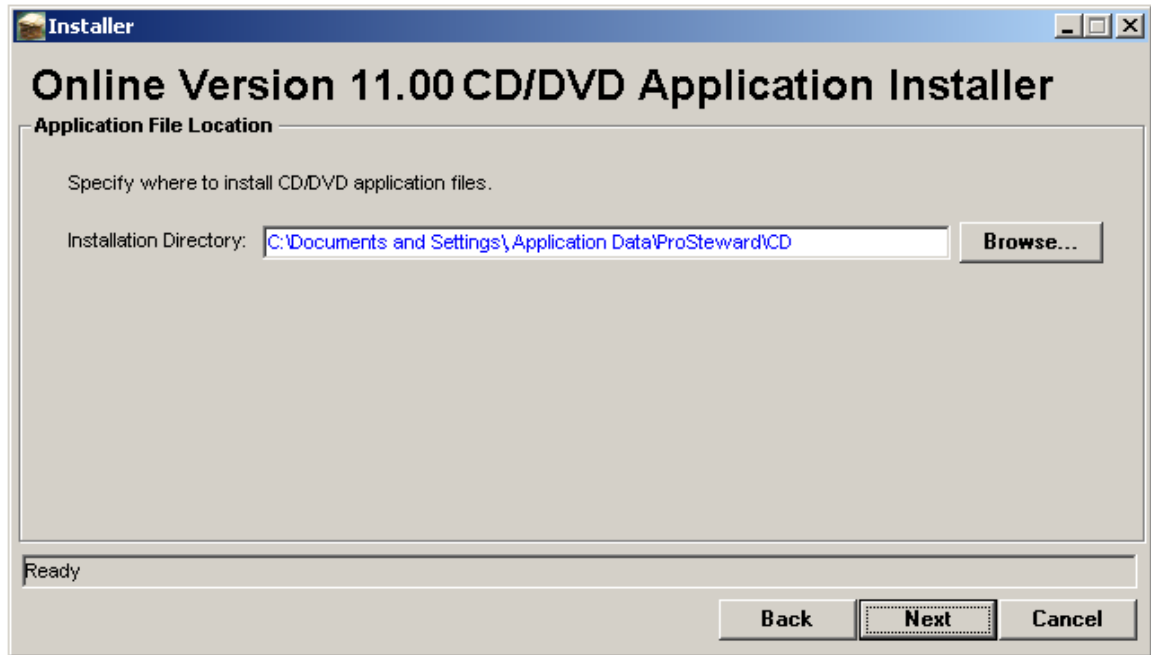
Online Version 11.00 CD/DVD Application Installer

Application File Location

Specify where to install CD/DVD application files.

Installation Directory: C:\Documents and Settings\,Application Data\ProSteward\CD   Browse...

Ready

Back   Next   Cancel

NOTE: If the file location does not exist the following message box will appear to create prompting to create the location as shown below.

Installer

The directory:
X:\ProSteward\CD Install
does not exist. Do you want the directory created for you?

Yes   No
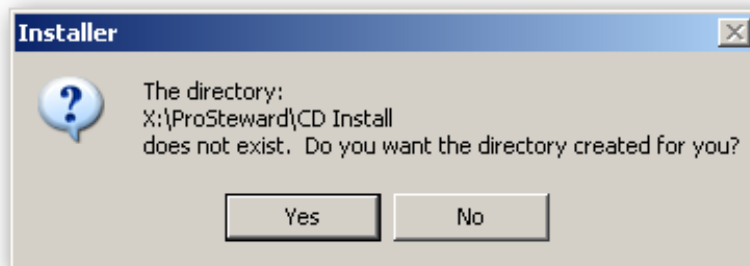
3.6.2. **If Data Files are installed to a Network location,** application files must be installed locally. The "Install Option (Application Files)" window is skipped and the user is required to select a local **Installation Directory** to install the app files to on the "Application File Location" window. See Step 3.7.

3.6.3. **If Data Files are installed to a Hard Drive location,** the user is given the option of installing application files on the "Install Option (Application Files)" window. The User can choose "Yes, install application files", or "No, do not install application files".
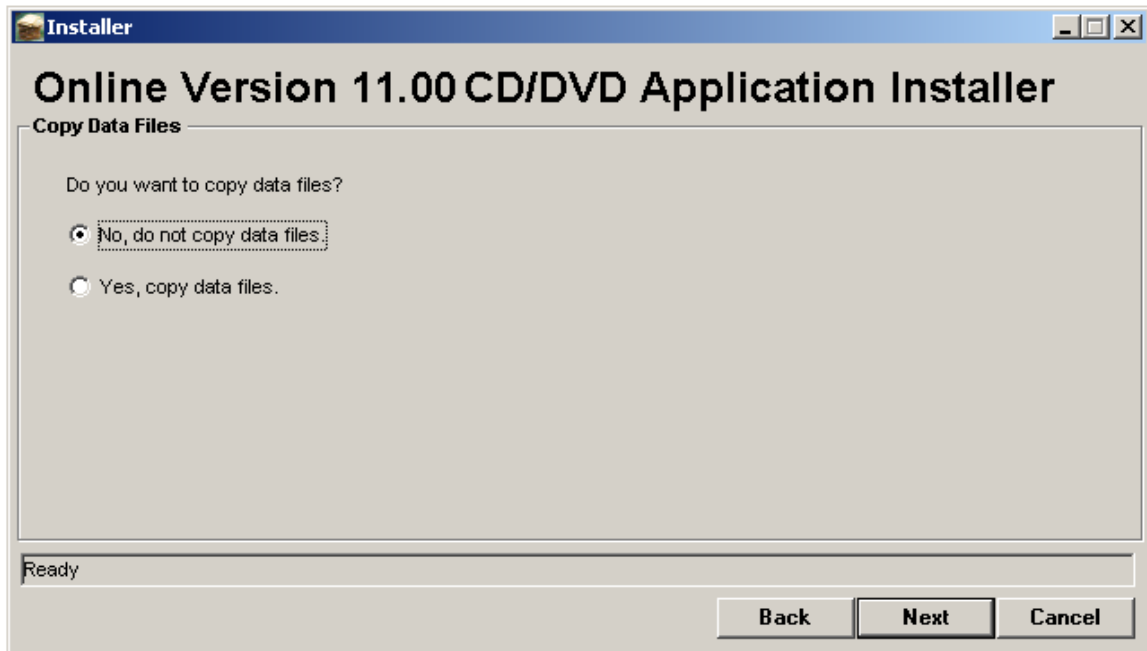
3.7. If **Yes** is selected, the "Application File Location" will open, and the User must enter an **Installation Directory** to install application files to. Specify the file location by clicking the Browse button and specify the location the application files should be installed. This must be on the user hard drive and needs to be a UNIQUE folder location, with no special characters in it. Spaces are acceptable. Click the **Next** button.

   3.7.1. If **No** is selected on the "Install Option (Application Files)" window, the "Application File Location" window will be skipped and the User will be taken to the "Configure Disk Locations" window. See Step 3.8.

NOTE: If the file location does not exist the following message box will appear to create prompting to create the location as shown below.
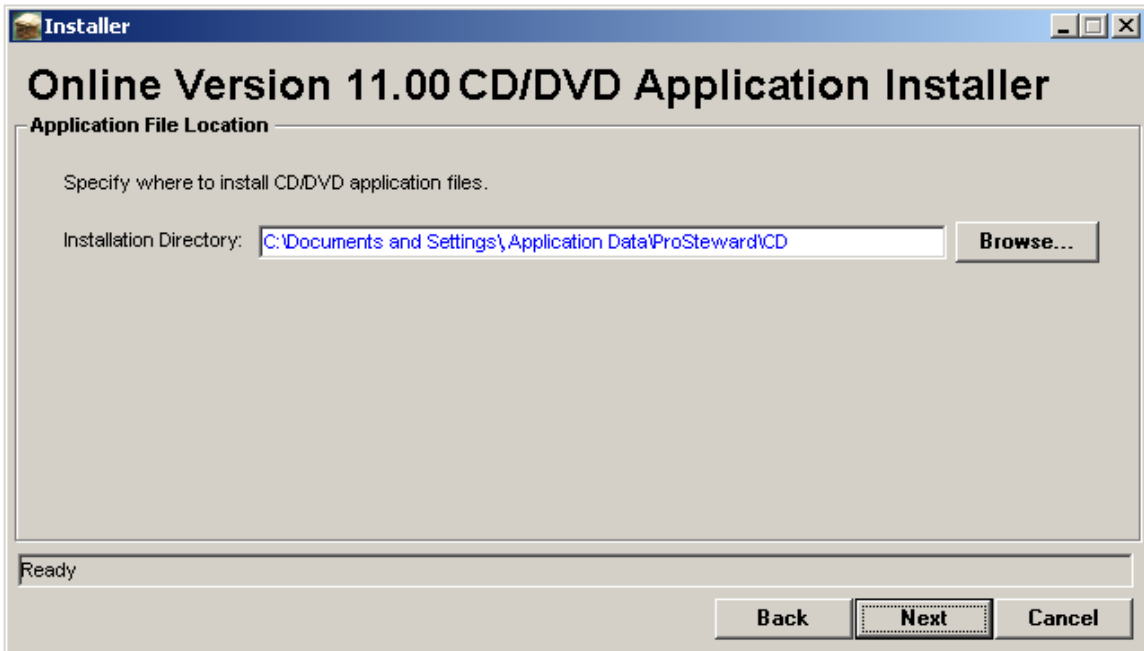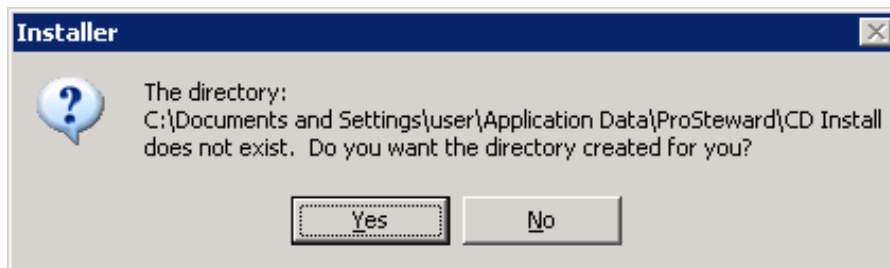

3.8. The "Configure Disk Locations" window opens. This window allows users performing a Custom install to indicate where each media unit that contains information associated with the CD-ROM is located. Click the **Browse** button to navigate the directory and select the location for each disk. The selected location will populate the location field. When finished, click the **Next** button.

Installer _ □ ×

Online Version 11.00 CD/DVD Application Installer

Configure Disk Locations

Please specify the location of each disk where data files will be copied from.

Disk Num.	Type	Location	
1	BOTH	D:\	Browse
2	DOCUMENT		Browse
3	DOCUMENT		Browse

Ready

Back | Next | Cancel
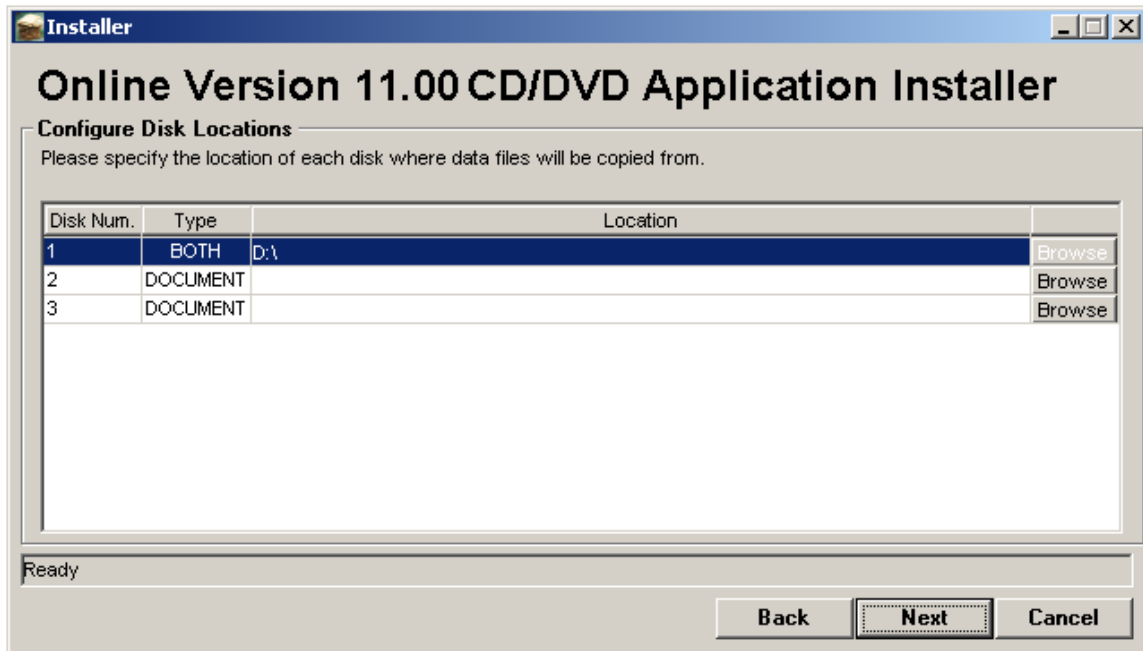
3.9. The "Installation Review" Window opens. The window will display the Installation Type as Custom. The Data File Copy Location, and the Application File Install Location will be specified according to the options selected by the user. The Installation Review window will display the Total Application Size if the user selected to copy Data Files. Click the **Finish** button to complete the Custom Installation.

Installer _ □ ×

Online Version 11.00 CD/DVD Application Installer

Installation Review

Please review the installation settings below.
Click Back to make changes or Finish to complete installation.

Installation Type: Custom
Data File Copy Location: Files will not be copied.
Application File Install Location: C:\Documents and Settings\Application Data\ProSteward\CD Install

Ready

Back | Finish | Cancel
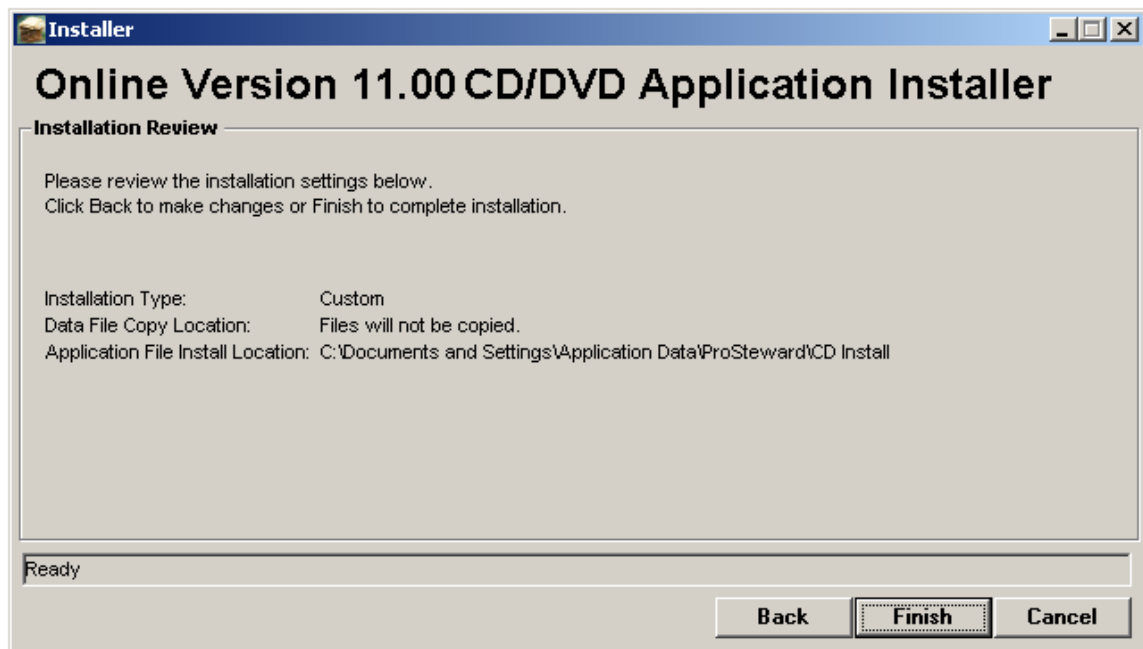
3.9.1.Files are copied to the selected location and the Registry is updated. After successful installation, the following message is displayed: "Installation completed successfully. (OK)"
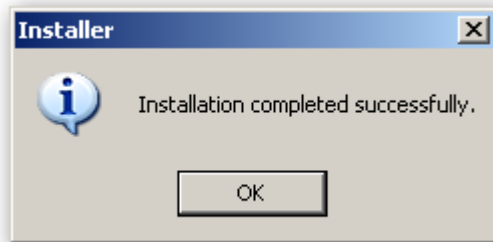
Multiple User Connectivity

Running the CD-ROM from a Set of Network Folders

This installation option is available to users that have access to the full contents of the CD-ROM from a set of network folders. This will allow the CD-ROM to run without experiencing any delay in accessing a CD-ROM drive. Ensure that before anyone installs the CD-ROM from a network location the following steps have already been taken to allow for multiple user connectivity. This will only need to be done the first time Disk 1 is placed on the network to allow for multiple user connectivity. You must be an administrator on the server to perform this installation.
1. Copy the entire contents of Disk 1 to the desired location on the network.
2. On the file server where Disk 1 is located open a command prompt.
3. Change the directory of the command prompt to the directory where Disk 1 is located.
4. Type the following line:
    a. **CREATE_WRITEFILE.bat** *servername**cdpath***cdrom.cdb**
       where *servername* is the UNC name of the file server and *cdpath* is the shared path name (what users will see from the network) of Disk 1. Be sure to use the full UNC naming since a mapped drive letter will restrict access to only those users who have the same drive letter mapped.
5. A file, cdrom.wrt, should now be created in the Disk 1 directory on the LAN. Users can then install and run the CD-ROM with normal and concurrent connections allowed.

Running the CD-ROM Without Installation

The Online CD-ROM application can be run without installing it to the user's computer. This method of application access is recommended for user's with current installations they do not want overwritten and for users that need access to the application but do not want it installed on a permanent basis.   If the CD-ROM application does not span multiple CDs, there is no need to

install the application. If the application does span multiple CDs and the user does not opt to install it, the application will prompt the user for disk location information as needed (i.e. The application will only prompt for Disk 3's location at the user's initial request to access a document located on Disk 3). No shortcut will be placed on the user's desktop and only the DBMS registry settings verified and written. Once the user closes the CD-ROM application the location information provided will be deleted from the machine's temporary memory.

CD Online CD-ROM Registry Entries

The following table lists the registry entries that are created and/or updated during the installation of the CD-ROM application. The installation process will first try to write to the HKLM registry keys listed below. Any information written to the HKLM portion of the registry will be available to all future users of the computer. If the user does not have update or write access to the HKLM portion of the registry, the key will be placed in the HKCU portion of the registry and will only be available to the user that was logged in when the registry key was created. When the Online CD-ROM application is run, it will attempt to read the keys first from HKCU, followed by HKLM if the HKCU key is not present.

Key	Name	Purpose	Value
HKLM/Software/ODBC/ODBCINST.INI/Adaptive Server Anywhere 8.0	Driver	Specifies the driver location for the ASA 8 runtime library. Verified/Written regardless if the CD is run for a single session only or installed to a user's PC.	InstallationDirectory or ApplicationDirectory\dbodbc8.dll
HKLM/Software/ODBC/ODBCINST.INI/Adaptive Server Anywhere 8.0	Setup	Specifies the driver location for the ASA 8 runtime library. Verified/Written regardless if the CD is run for a single session only or installed to a user's PC.	InstallationDirectory or ApplicationDirectory\dbodbc8.dll

Key	Name	Purpose	Value
HKLM/Software/ODBC/ODBCINST.INI/ODBC Drivers	Adaptive Server Anywhere 8.0	Maps the ASA alias to an installed instance of the ODBC connectivity. Verified/Written regardless if the CD is run for a single session only or installed to a user's PC.	Installed
HKLM/Software/ProSteward/Online/CD-ROM	DiskNLocation	Specifies the location of Disk N (there will be one key for each disk in the CD set). Verified/Written only when the CD-ROM is installed to a user's PC.	DiskNDirectory
HKLM/Software/ProSteward/Online/CD-ROM	InstallCreationDate	Specifies the date the CD ROM was installed. Verified/Written only when the CD-ROM is installed to a user's PC.	Installation date
HKLM/Software/ProSteward/Online/CD-ROM	InstallDirectory	Specifies the installation directory of the CDROM (if it is installed on the computer) used during installation to detect previous installations. Verified/Written only when the CD-ROM is installed to a user's PC.	Installation directory

Key	Name	Purpose	Value
HKLM/Software/ProSteward/Online/CD-ROM	DatabaseLocation	Specifies the installation directory of the database if copied to the computer during installation. Verified/Written only when the database is copied as specified in the system options table.	Installation directory

Preparing the CD-ROM as Physical Media

To create a physical disk, make sure all your files are copied directly into the folder that will be burned to the disk. Although the program will create these files in folders with names such as "disk1", this folder should not be copied onto the physical disk.

If you are making DVDs and there are any issues in writing the files correctly using the windows operating system, CGI advises using another third party disk preparation program to assist in the setup and burning of the DVDs themselves.