



**PMXpert**<sup>®</sup>

Preventive Maintenance Software

# **Installation Manual**

Updated Wednesday, January 25, 2017

© 2017 PMXpert Software/Profit Systems Inc.

# Table of Contents

<b>Installation Manual Introduction</b>	<b>1</b>
<b>Minimum System Requirements</b>	<b>1</b>
<b>Download Software or Update</b>	<b>3</b>
<b>PMXpert Standard &amp; Enterprise</b>	<b>3</b>
<b>Install Standard as New Installation</b>	<b>3</b>
<b>Update Previous Version, Standard Edition</b>	<b>5</b>
<b>Install Enterprise as New Installation</b>	<b>5</b>
<b>Update Previous Version, Enterprise Edition</b>	<b>6</b>
<b>What Version am I Running and What is My User ID?</b>	<b>8</b>
<b>Update Your PMXpert License</b>	<b>9</b>
<b>Copyright and Disclaimers</b>	<b>10</b>
<b>Index</b>	<b>11</b>

# Installation Manual Introduction

This **Installation Manual** is a truncated version of the full PMXpert User Manual, and contains only instructions for installing your PMXpert application.

- [Minimum System Requirements](#) <sup>1</sup>
- [Download Software or Update](#) <sup>3</sup>
- [PMXpert Standard & Enterprise](#) <sup>3</sup>
- [Install Standard as New Installation](#) <sup>3</sup>
- [Update Previous Version, Standard Edition](#) <sup>5</sup>
- [Install Enterprise as New Installation](#) <sup>5</sup>
- [Update Previous Version, Enterprise Edition](#) <sup>6</sup>
- [What Version am I Running and What is My User ID?](#) <sup>8</sup>
- [Update Your PMXpert License](#) <sup>9</sup>

The full PMXpert Software Manual contains further instructions for setting up and using PMXpert.

You can find the complete PMXpert User Manual in the Client Login area of the PMXpert website.

## Minimum System Requirements

Before proceeding with installation, ensure that your computer system meets or exceeds the minimum requirements set out for PMXpert. If you need assistance with assessing your computer system's suitability, please contact PMXpert Support.

	Server	Workstation
<b>Processor</b>	<b>Minimum:</b> Pentium 4, 3GHz+	<b>Minimum:</b> Pentium 4, 2GHz+
<b>Printer</b>	N/A	A printer is required to print reports.
<b>Operating System</b>	Windows Server 2000, 2003+, 2008 and 2008 R2, Windows 7, 8 and 10 with latest service packs (32 & 64 bit versions).	<b>Minimum:</b> Windows 2000 with latest service packs <b>Recommended:</b> Windows XP, Vista, Windows 7 with latest service packs (32 & 64 bit versions).
<b>Memory</b>	<b>Minimum:</b> 4GB <b>Recommended:</b> 4GB+	<b>Minimum:</b> 1GB <b>Recommended:</b> 4GB+
<b>Disk Space</b>	<b>Minimum:</b> 100+ MB <b>Recommended:</b> 2GB	<b>Minimum:</b> 50 MB+
<b>Media</b>	N/A	Mouse or pointing device
<b>Video</b>	Resolution: 800 x 600, 256 color display	<b>Minimum:</b> 800 x 600, 256 color display <b>Recommended:</b> 1024 x 768, 32 bit color
<b>Supported Networks</b>	Windows Server 2000, 2003, 2008, 2008 R2, and 2012 <i>*Will run through Citrix Systems, Terminal Services</i>	Windows Server 2000, 2003, 2008, and 2008 R2 <i>*Will run through Remote Desktop</i>

<b>Supported Databases</b>	<b>With Standard Edition purchase:</b> Access 2000  <b>With Enterprise Edition purchase:</b> MS-SQL 2000, MS-SQL 2005, MS-SQL 2008, MS-SQL 2008 R2, and MS-SQL 2012/2014 <i>*All MS-SQL Express versions are supported</i>	N/A
<b>Network Speed</b>	<b>Minimum:</b> 100MB/Sec <b>Recommended:</b> 1GB/Sec	<b>Minimum:</b> 100MB/Sec <b>Recommended:</b> 1GB/Sec
<b>Supported Email Clients</b>	N/A	32-bit versions of Microsoft Outlook Gmail SMTP-based email clients MAPI-based email clients

## Download Software or Update

**IMPORTANT: Before upgrading from Version 9 to Version 10, all custom reports must be rebuilt or they will be lost.**

When installing the update, the program will confirm if you have any custom reports and give you the option to continue or cancel the installation.

**Cancel** the installation if you have custom reports you want to keep.

You can rebuild your reports yourself or contact our **Support Department** for assistance.

1. To download the Software, log in to the **Client Login** area with your User ID and your Password.
2. Click on the **Downloads** tab and click on the most recent PMXpert link at the top.
  - a. **REMEMBER:** All custom reports from Version 9 must be rebuilt before upgrading to Version 10 or they will be lost.
  - b. **Cancel** the installation if you have custom reports that you want to keep. You can rebuild your reports yourself or contact our **Support Department** for assistance.
  - c. If you are running PMXpert Version 8 or lower, you must first upgrade to Version 9 before upgrading to Version 10.
3. Save the **PMXsetup.exe** to your Desktop and double-click it.
4. Click **Run**. The **Installation Wizard** will begin. Click [Next] to continue.
5. The next screen contains the license information. Please read the agreement and click **Agree** if you accept the terms and conditions or **Disagree** if you cannot accept them. If you disagree with the license agreement you cannot continue. Click [Next] to continue.
6. The next screen provides some information about Standard versus Enterprise. Read this and click [Next] to continue.
7. You now have the option to **Install as a New Installation** or **Update a Previous Version**. The instructions will explain the four variations below:
  - a. [Install Standard as a New Installation](#) <sup>3</sup>
  - b. [Update a Previous Version, Standard Edition](#) <sup>5</sup>
  - c. [Install Enterprise as a New Installation](#) <sup>5</sup>
  - d. [Update a Previous Version, Enterprise Edition](#) <sup>6</sup>

## PMXpert Standard & Enterprise

There are two editions of PMXpert: **Standard** and **Enterprise**. Standard uses MS Access databases, while Enterprise uses MS-SQL Server databases. Other than that, both editions are identical.

The evaluation version you would have received is PMXpert Standard. You will require a special license file from PMXpert Software to run the Enterprise Edition. If you want to evaluate the Enterprise Edition, please contact the nearest PMXpert Software **Sales Department**.

## Install Standard as New Installation

1. If you chose **Install as a New Installation**, click [Next] to continue.
2. Choose **PMXpert Standard Edition** and click [Next].
3. You now have the option to install PMXpert on a single computer or on multiple workstations sharing data from a common server. Choose one of the options.

### ▼ Single User Installation

1. If the entire program will be installed on one machine and will not be accessed by anything else, select **Stand Alone Installation** and click [Next].
2. You must now choose where you want the PMXpert application and data files to be installed. These folders can be the same, or you can install the data into a different folder than the application files. Make your selections and click [Next] to continue.
3. At this point, the setup program has all the information it needs to complete the installation. Verify that the installation folders are correct and click [Next] to begin the installation.
4. **NOTE:** The install may require your computer to be restarted one or more times during the process.
5. Once complete, click [Finish].

### ▼ Multi-User Installation

Select **Server Installation** and click [Next].

There are now two steps to the installation. **First**, you must perform the server installation. **Then**, you will install PMXpert on each workstation.

#### ▼ Server Installation

1. **NOTE:** The server installation **MUST** be performed from a workstation with full access to the server, but **NOT** the actual server computer itself. The install may require one or more restarts of the computer from which the install is performed.
2. Choose where you want the PMXpert application and data files to be installed on the server. These folders can be the same or you can install the data into a different folder than the application files. These folders must be accessible to all users running PMXpert. Make your selections and click [Next] to continue.
3. At this point, the setup program has all the information it needs to complete the server installation of PMXpert. Verify that the installation folders are correct and click [Next] to begin the installation.
4. Once installation is complete, click [Finish] and you are ready to install to the workstations.

#### ▼ Workstation Installation

1. Re-run the setup program, but select the **Workstation Installation** option this time.
2. Click [Next] to continue.
3. You must now choose where you want the local (workstation) PMXpert files to be installed. It will default to C:\Program Files\PMXpert.
4. In addition, you must specify the location of the PMXpert application and data files on the server so that the local PMXpert loader application knows where to get the required application files and where to access the data.
5. Make your selections and click [Next] to continue.
6. At this point, the setup program has all the information it needs to complete the workstation installation of PMXpert. Verify that the installation folders are correct and click [Next] to begin the installation.
7. Once installation is complete, click [Finish].
8. You can now perform the workstation installation on all other workstations as required.

## Update Previous Version, Standard Edition

1. Choose **Update a Previous Version**. Make sure that you have a current backup of your data before proceeding. Click [Next] to continue with this option.
2. The next page displays the history of version changes called **What's New**. Please take the time to print or read this page, as it contains important information. Click [Next] to continue.
3. Choose **PMXpert Standard Edition** and click [Next].
4. The process will now vary slightly, depending on whether you are updating a single user or a multi-user server application.

### ▼ Update Single User

1. You must now verify the location of the PMXpert application and data files. These folders should be set to the correct locations, but if not, you can reset them here by clicking the **Browse** buttons. Click [Next] to continue.
2. Once again, verify that the installation folders are correct and click [Next] to begin the installation.
3. Once installation is complete, click [Finish].

### ▼ Update Multi-User Server

1. You must now verify the location of the PMXpert application and data files. These folders should be set to the correct locations, but if not, you can reset them here by clicking the **Browse** buttons. Click [Next] to continue.
2. Once again, verify that the installation folders are correct and click [Next] to begin the installation.
3. Once installation is complete, click [Finish].

## Install Enterprise as New Installation

1. If you chose **Install as a New Installation**, click [Next] to continue.
2. Choose **PMXpert Enterprise Edition** and click [Next].
3. There are now two steps to the installation. **First**, you must perform the server installation. **Then**, you will install PMXpert on each workstation.

### ▼ Server Installation

1. Select **Server Installation** and click [Next].
2. **NOTE:** The server installation **MUST** be performed from a workstation with full access to the server, but **NOT** the actual server computer itself. The install may require one or more restarts of the computer from which the install is performed.
3. You must now choose where you want the PMXpert application files to be installed on the server. This folder must be accessible to all users running PMXpert. Make your selection and click [Next] to continue.
4. The setup program now has all the information it needs to begin the installation of PMXpert. Verify that the installation folder is correct and click [Next] to begin the installation.
5. Once all files have been copied to the server, the setup program will prompt for the **SQL Server Options**. You must provide the following information to allow the setup program to create all the required MS-SQL databases on your MS-SQL Server:
  - a. **SQL Server:** This is the name or IP of the MS-SQL server where you want to create the PMXpert databases.
  - b. **Admin Username:** This must be an administrator account on the MS-SQL server.

- c. **Password:** This is the password of the administrator account.
  - d. **Database:** This is the name you want to give the PMXpert database on the MS-SQL server.
6. Three other databases will be created on the server: **PMXpertSystem**, **PMXpertReports** and **PMXpertSample**.
  - a. The **PMXpertSample** database contains sample data that can be used for testing the operation of the software prior to entering your live data. This database can be deleted if it is not required.
  - b. The **PMXpertSystem** and **PMXpertReports** must not be deleted or renamed.
7. Once this data has been entered, click [OK] to continue.
8. The setup program will perform a connection test to the MS-SQL server specified and ensure that the username and password are valid. It will also ensure that the username is a valid system administrator account. If this test fails, you will have to re-enter the information and try again.
9. If the test succeeds, the setup program will proceed with the creation of all required databases.
10. PMXpert Enterprise allows logging in to the MS-SQL server database using Windows Authentication or SQL Server Authentication. Individual user accounts can be granted READ/WRITE access to the databases. The simplest method is a Windows Authentication, whereby you can grant a Windows group containing all PMXpert users READ/WRITE access to the databases. This makes login to PMXpert simpler, as the user does not have to enter any SQL server login information.
11. Once installation is complete, click [Finish] and you are ready to install to the workstations.

### ▼ Workstation Installation

1. Re-run the setup program, but select the **Workstation Installation** option this time. Click [Next] to continue.
2. You must now choose where you want the local (workstation) PMXpert files to be installed. It will default to C:\Program Files\PMXpert.
3. In addition, you must specify the location of the PMXpert application files on the server so that the local PMXpert loader application knows where to get the required application files.
4. Make your selections and click [Next] to continue.
5. The setup program now has all the information it needs to complete the workstation installation of PMXpert. Verify that the installation folders are correct and click [Next] to begin the installation.
6. Once this is complete, click [Finish].
7. You can now perform the workstation installation on all other workstations as required.

## Update Previous Version, Enterprise Edition

**NOTE:** This update will only update the shared files on the server.

Each time a user runs PMXpert from the workstation, the loader application (PMXpertLoader.exe) performs a check against each required file on the server, and any new updates are automatically copied to the workstation prior to running PMXpert.

In this way, updates need only be installed once to the shared folder on the server and all workstations will update themselves as required.

1. Choose **Update a Previous Version**. Make sure that you have a current backup of your data before proceeding and click [Next]

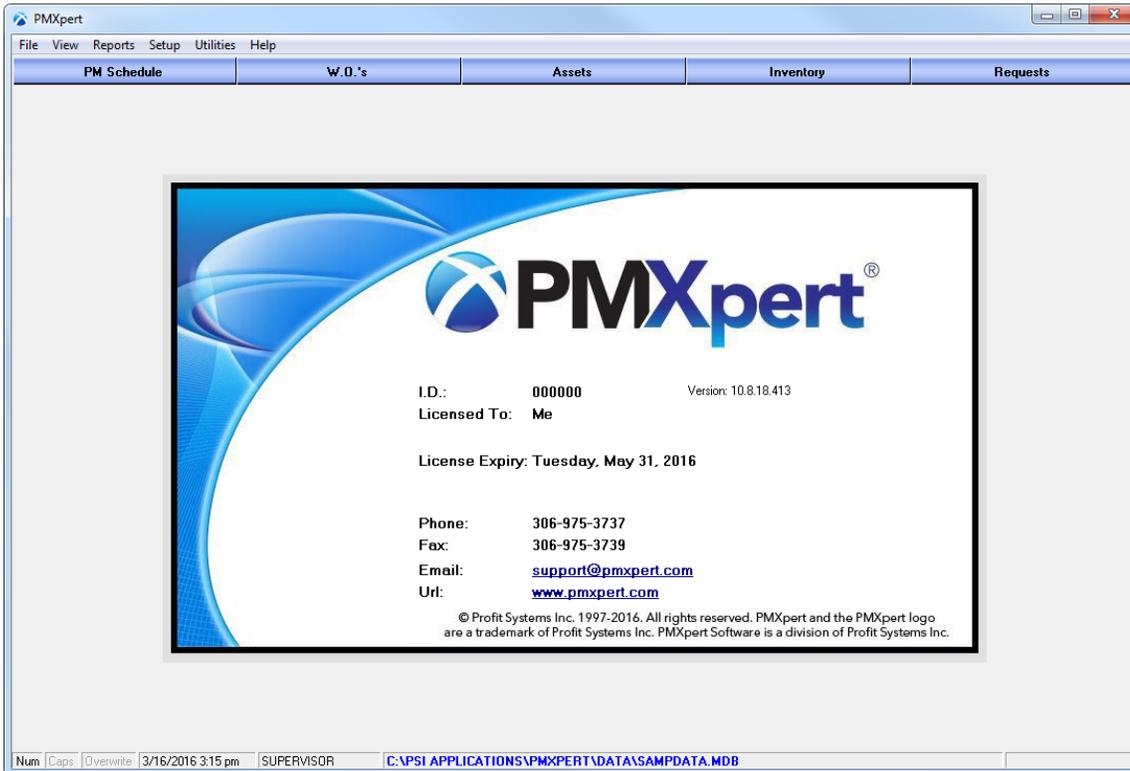
2. The next page displays the history of version changes called **What's New**. Please take the time to print or read this page, as it contains important information. Click [Next] to continue.
3. You must now verify the location of the PMXpert application on the server. This folder should be set to the correct location, but if not, you can reset it here by clicking the **Browse** button.
4. **NOTE:** The application folder must be set to the location of the PMXpert application on the shared server.
5. Click [Next] to continue.
6. Once again, verify that the installation folders are correct and click [Next] to begin the installation.
7. Once all files have been copied to the server, the setup program will prompt for the **SQL Server Options**. You must provide the following information to allow the setup program to update the PMXpert databases on your MS-SQL Server:
  - a. **SQL Server:** This is the name or IP of the MS-SQL server where the PMXpert databases reside.
  - b. **Admin Username:** This must be an administrator account on the MS-SQL server.
  - c. **Password:** This is the password of the administrator account.
8. Once this data has been entered, click [OK] to continue.
9. The setup program will perform a connection test to the MS-SQL server specified and ensure that the username and password are valid. It will also ensure that the username is a valid system administrator account. If this test fails, you will have to re-enter the information and try again.
10. If the test succeeds, the setup program will proceed with the update of all required PMXpert databases.
11. Once it is complete, click [Finish].

## What Version am I Running and What is My User ID?

In PMXpert's **Main Menu**, click **Help | About**.

The **Version Number** will appear below **PMXpert Software**.

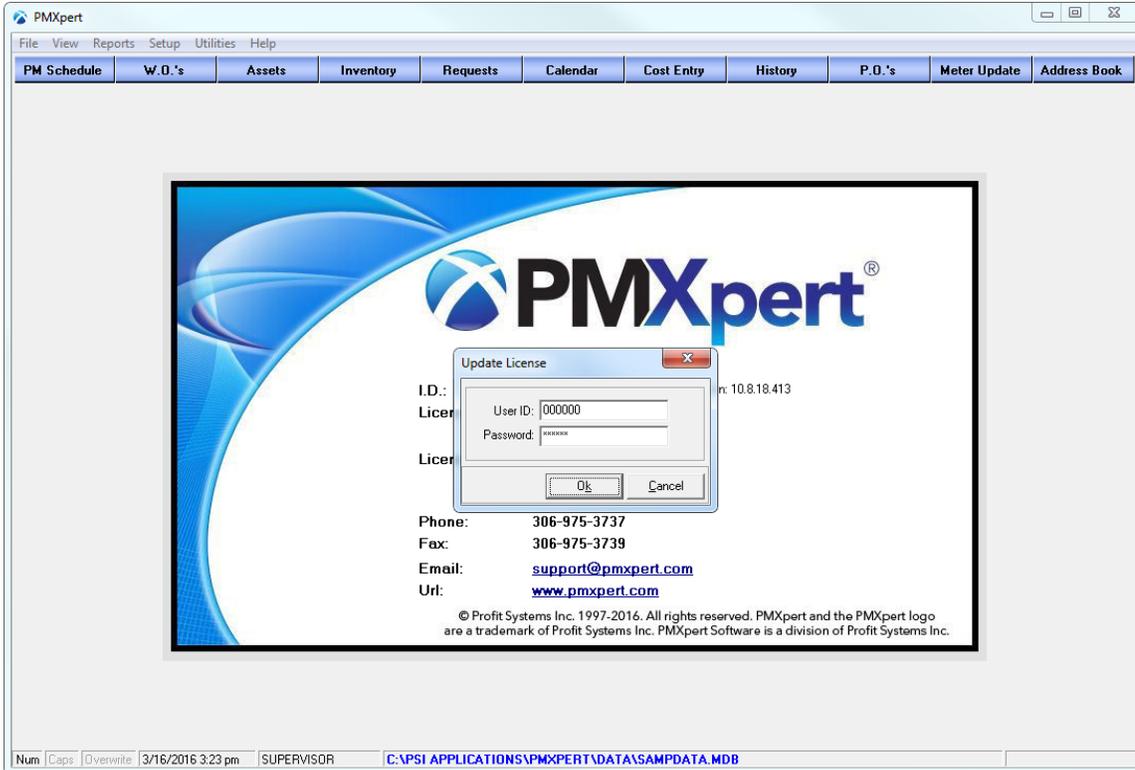
Your six-digit **I.D.** appears in the middle of the screen.



# Update Your PMXpert License

Select **File | Update License** from PMXpert's main menu.

Enter your **User ID** and **Password** and click **OK**.



The **Information** dialog box should inform you that the license has been updated successfully. Click **OK**.

# Copyright and Disclaimers

Written and designed by **PMXpert Software**, a wholly owned subsidiary of [Profit Systems Inc.](#)

Last Updated: Wednesday, January 25, 2017

## © 2017 PMXpert Software/Profit Systems Inc. All rights reserved.

No part of this manual may be reproduced or transmitted in any form or by any means without prior written permission from Profit Systems Inc., **except in the following circumstance:** *Customers who have purchased PMXpert Software are granted permission to make copies of the manual for personal use, and for the personal use of other members or employees of the customer company, provided this copyright page and this permission notice are preserved on all copies. Copies of the manual may not be made for re-sale.*

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and author make no claim to these trademarks.

## Limit of Liability/Disclaimers

The content of this manual is provided for informational use only and is subject to change without notice.

Profit Systems Inc., the publisher, and the author assume no responsibility or liability for errors, inaccuracies or omissions in this manual. The accuracy and completeness of the information provided in this manual are not guaranteed. Profit Systems Inc., the publisher, and the author shall not be liable for any loss of profit or any other damages resulting or alleged to have resulted, directly or indirectly, from the use of information contained in this manual or from the use of programs and source code that may accompany it. This manual and the information herein are not warranted to produce any particular results.

For purposes of illustration, the author has created various names, company names, mailing addresses, phone numbers, email addresses, etc., all of which are fictitious. Any resemblance to any actual person, company, organization or information is unintentional and purely coincidental.

## License Agreement

This manual, as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such license. The license is effective until terminated. You may terminate it at any time by destroying the program together with all copies in any form. It will also terminate upon conditions set forth in the Agreement or if you fail to comply with any term or condition of the Agreement. You agree upon such termination to destroy the program together with all copies in any form.

**Feedback?** Comments or corrections related to the content of the User Manual can be directed to [Manual@PMXpert.com](mailto:Manual@PMXpert.com).

# Index

## - A -

acknowledgements 10

## - C -

copyright 10

## - D -

disclaimer 10

## - I -

installation

    downloading software 3

    enterprise, new 5

    enterprise, update 6

    standard, new 3

    standard, update 5

## - L -

license

    agreement 10

    updating 9

## - S -

software

    system requirements 1

    version 8

system requirements

    PMXpert software 1

## - U -

user id 8

## - V -

version 8



# **PMXpert Installation Manual**

© 2017 PMXpert Software/Profit Systems Inc.