



PMXpert Installation Guide

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Introduction

- PMXpert Software is a comprehensive and user-friendly CMMS (Computerized Maintenance Management System) solution designed to simplify preventive maintenance, work orders, and inventory control in one integrated program.
- This **Installation Guide** is a truncated version of the full PMXpert User Manual, and contains only the instructions for installing your PMXpert application.
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- 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**.

System Requirements

- For the most up-to-date list of Technical Requirements for PMXpert Software, go to <https://www.pmxpert.com/technical-requirements.html>

Standard or 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](#).

Download Software

- **IMPORTANT: If 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 of the [PMXpert website](#) 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 below will explain the four variations:
 - a. [Install Standard New](#) 
 - b. [Update Standard](#) 
 - c. [Install Enterprise New](#) 
 - d. [Update Enterprise](#) 

Install Standard New

- If you chose **Install as a New Installation**, click [Next] to continue.
- Choose **PMXpert Standard Edition** and click [Next].
- 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, and click the corresponding heading below for further instructions:

▼ 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

1. Select **Server Installation** and click [Next].
2. There are now two steps to the installation. **First**, you must perform the server installation. **Then**, you will install PMXpert on each workstation.

NOTE: The install may require one or more restarts of the computer from which the install is performed.

3. **Server Installation:**
 - a. Choose where you want the PMXpert application and data files to be installed on the server.
 - i. These folders can be the same or you can install the data into a different folder than the application files.
 - ii. These folders must be accessible to all users running PMXpert.
 - b. Make your selections and click [Next] to continue.
 - c. 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.
 - d. Once installation is complete, click [Finish] and you are ready to install to the workstations.
4. **Workstation Installation:**
 - a. Re-run the setup program, but select the **Workstation Installation** option this time.
 - b. Click [Next] to continue.
 - c. You must now choose where you want the local (workstation) PMXpert files to be installed. It will default to C:\Program Files\PMXpert.

- d. 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.
- e. Make your selections and click [Next] to continue.
- f. 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.
- g. Once installation is complete, click [Finish].
- h. You can now perform the workstation installation on all other workstations as required.

Update Standard

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

- 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.
- Once again, verify that the installation folders are correct and click [Next] to begin the installation.
- Once installation is complete, click [Finish].

▼ Update Multi-User Server

- 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.
- Once again, verify that the installation folders are correct and click [Next] to begin the installation.
- Once installation is complete, click [Finish].

Install Enterprise New

- If you chose **Install as a New Installation**, click [Next] to continue.
- Choose **PMXpert Enterprise Edition** 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. Select **Server Installation** and click [Next].

NOTE: The install may require one or more restarts of the computer from which the install is performed.
2. 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.
3. 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.
4. 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.
5. 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.
6. Once this data has been entered, click [OK] to continue.
7. 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.
8. If the test succeeds, the setup program will proceed with the creation of all required databases.
9. PMXpert Enterprise allows logging in to the MS-SQL server database using Windows Authentication or SQL Server Authentication.
 - a. Individual user accounts can be granted READ/WRITE access to the databases.
 - b. The simplest method is a Windows Authentication, whereby you can grant a Windows group containing all PMXpert users READ/WRITE access to the databases.
 - c. This makes login to PMXpert simpler, as the user does not have to enter any SQL server login information.
10. 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 Enterprise

- **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].

Update PMXpert License

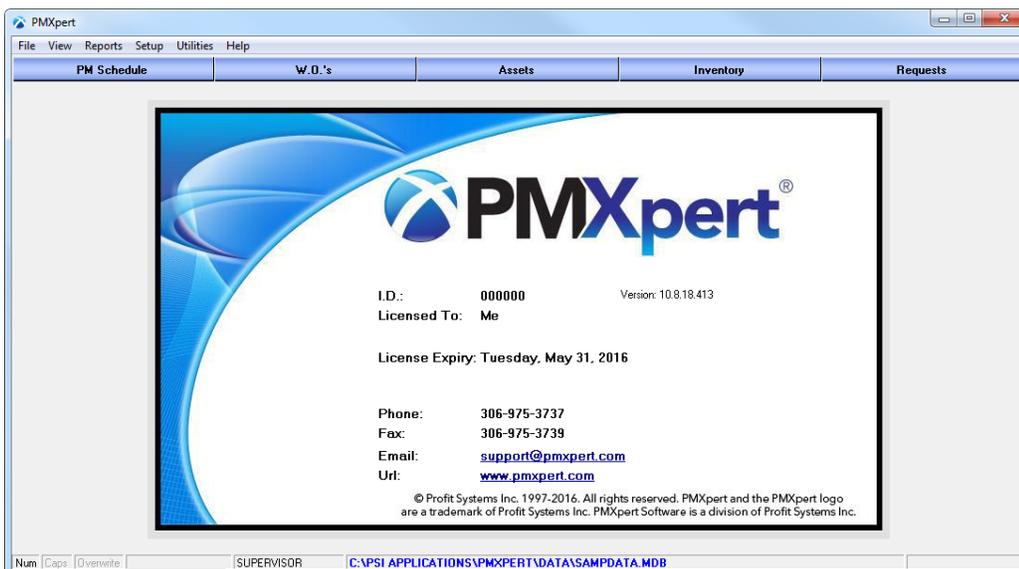
- Select **File | Update License** from PMXpert's main menu.
- Enter your **User ID** and **Password** and click **OK**.



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

Version and 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.



Contact Us

- We have PMXpert offices in North America, Australia, and the United Kingdom, allowing us to provide sales, training, and support services to our clients in all time zones.
- To find contact information for the PMXpert office nearest you, go to <https://www.pmxpert.com/contact-us.html>

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Last Updated: Tuesday, August 16, 2022

For questions or corrections related to the content of the PMXpert Installation Guide, email Manual@PMXpert.com

For questions related to program functionality or technical issues, please contact the [PMXpert Support Department](#)

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