

# PM Master

## Detailed Installation and Upgrade (Import) Instructions

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## **Important Notes and Recommendations**

### **Important Notes for all users:**

All installations default as a 30-day demo that can be permanently unlocked after purchase without loss of data used during demo evaluation.

**Important Notes for existing users with prior versions of PM Master:** PM Master 1.4 (single-user and multi-user setups) can be installed on the same computer(s) containing a prior version of PM Master while evaluating the PM Master 1.4 demo. PM Master 1.4 installs and runs independently from prior versions, and is not designed to connect to your prior version database. After installation (setup), data can be imported from your prior version (completing the upgrade process), without changing the data in the previous version database (in case reverting back to prior version). Before proceeding with installation instructions, make a current backup of the currently used database, as a precautionary measure (the Backup Data feature can be used to help locate and/or copy this database, named "pm\_tabs.mdb").

### **Recommended Demo Evaluation Method**

**For All Users (new users and existing users):** We recommend evaluating the demo as single-user database, since setup is simple, and the user experience is the same as in a multi-user setup. Setup PM Master as a single-user database by following the section, "Setup on Standalone Machine" in the table of contents, and accepting the default install location. When setup is complete, start PM Master using the "PM Master 1.4" icon on your desktop. Note: A single-user setup may be converted to a multi-user setup at a later time if desired, either before or after purchasing/licensing, by following the section, "Converting from a single-user user installation to a multi-user installation" in the table of contents.

**New users (without a previous version of PM Master):** After installation, Select "Connect Tutorial Database" from the Tutorial menu to connect PM Master to a pre-populated sample database. We recommend following the matching guided tutorial document, which guides the user through interactions with this sample database.

**Existing users (with a previous version of PM Master):** After installation, follow the section, "Importing Data from a previous version of PM Master" in the table of contents. Your company's data will appear in the "Actual" database (as opposed to the "Tutorial Database"). Optionally, *before importing*, use the "Backup Data" function to make a backup copy of the currently empty database (pm\_tabs.mdb) - in case you wish to restore the empty database and repeat the import process later in order to restore the data after experimenting with new features. See section, "Changes in Version 1.4" in the User's Guide for a description of new features, and a guide to locating them within the User's Guide. Try implementing the new features using your company's own data (data in your prior version database will not be affected/changed).

## Setup on Standalone Machine (Single-User setup)

### System Requirements:

Operating System: Windows 2000, XP, Server 2003, Vista, Server 2008, Windows 7, Windows 8, or Windows 10. (Touch-screen compatible)  
100 MB RAM (500 MB or more Recommended)  
60 MB Hard Drive Space (for each PC if using multi-user version),  
500 MB free hard drive space

### Setup Instructions:

1. Close any applications which may be running before beginning installation.
2. Launch the PM Master Basic demo setup program, either from the CDROM menu (if you have a Demo CD) or from the self-extracting executable (.exe) file - if the PM Master demo was downloaded from our website.
3. An installation welcome screen will appear. Click the Next button.
4. The End-User License Agreement appears. In order to proceed with installation, you must accept the terms of the license agreement by clicking the check box. Then click the Next button.
5. The Install Location screen appears. A default install location is suggested, and we strongly advise accepting the default location. However, an alternate install location may be selected by choosing the "Browse" button and browsing to the desired folder. If the install location is changed, a folder on the local computer's hard drive (typically the "C" drive) must be selected, and the selected folder must **not** be the same folder used for a previous version of PM Master or another software package. This version of PM Master requires its own, dedicated folder. After the install location is decided, choose the Next button.
6. A screen will appear saying "Ready to Install". Click the Install button to begin installation. This may take several minutes. Several windows, some with progress bars will open and close on their own - do not press any keyboard or mouse buttons or close any windows. Wait until a screen appears saying "PM Master Basic Setup has been successfully installed". Then click the Finish button.
7. An icon/shortcut named "PM Master X.XX" will appear on your desktop, which can be used to start PM Master. The User's Guide can be accessed from the main screen ("switchboard") or from the help menu after starting PM Master). If a logon with username and password is desired, consult this User's Guide for instructions on enabling security.
8. PM Master is setup as a time-limited demo at this stage, and may be evaluated for a period of 30 days. If you have purchased a license, it can be entered from the main

screen/Switchboard by following the instructions provided with the license information. If you intend to proceed to import data from a previous version of PM Master, then do not add any data to the "Actual" actual database (or else importing will not be allowed).

## **Setup on a Network (Multi-User setup)**

### System Requirements:

PM Master Basic can be setup on servers or peer-to-peer networks. Almost any Network Operating System will work, but the PC operating systems must be one of: Microsoft Windows 2000, XP, Server 2003, Vista, Server 2008, Windows 7, Windows 8, or Windows 10. (Touch-screen compatible)

Note: PM Master runs on PC's, and only the data in a multi-user setup is stored on the server/shared location.

For hard drive space & RAM requirements, see "Setup on Standalone Machine" - above.

Back-end/Data requirements: we suggest reserving 10 MB Space for shared back-end database - initially. This will grow as data is entered.

**Important:** all copies of PM Master accessing a particular shared/networked database must be of the same edition (all Basic editions) and version. (Note: A set of PM Master seats may all be upgraded simultaneously, while retaining data generated through prior editions/versions.)

### Setup Instructions:

1. Follow instructions for "Setup on Standalone Machine" above on each computer that is to have access to the multi-user database. For each computer, the "Install location" must be on the local hard drive (usually the "C" drive), even though data will be shared on a server or shared folder (we strongly advise accepting the default install location). Be sure to note the full path of the "Install Location", as it is needed in steps below. If unsure of the install location (after standalone installation is complete), it can be found by choosing "Installation and Connection Information" from the File menu on the Switchboard (it is called "Installation Path"). Note: PM Master may be evaluated as a demo on multiple computers in multi-user setup (each computer will have a time-limited demo with access to the shared data prior to demo expiration).
2. Select any one of the computers (having had installation in step 1). The "actual" database is connected upon initial installation by default. However, if PM Master had already been started/used and the "tutorial" database had already been connected on this computer then restart PM Master and make sure the "Actual" database is connected (and not the tutorial database; from the Tutorial menu select "Connect Actual Database") - and then close PM Master. Then, on this computer, move (not copy) the database file "pm\_tabs.mdb" from the PM Master install location (noted in step 1) to the desired server or shared folder location. Do ***not*** place the file pm\_tabs.mdb in the same folder used for a prior version of PM Master or other software. This version of PM Master requires its own, dedicated folder. Note that on some operating systems, some of the folders or files in the

install location path may be hidden, and you will need to set folder options to "show hidden files and folders" in order to locate the file "pm\_tabs.mdb". When this step is complete, the file pm\_tabs.mdb must no longer exist in the PM Master install location.

3. On each of the other computers (having had installation in step 1 and not used in step 2), ensure the "Actual Database" is connected (refer to step 2 for doing so). Close down PM Master. Then delete the file "pm\_tabs.mdb" from each computers' install location. (If this file is left on a computer, you will not be able to point that computer to the shared database on the server or shared folder.)
4. Ensure each computer has FULL network permissions for the shared folder containing "pm\_tabs.mdb", including read, write, and even delete permission (security restrictions can be set later within PM Master menus, as mentioned in step 6 below). Network permissions are typically set by an IT administrator. Here is an optional, but good test for adequate network permissions (that anyone can do): From each computer, you ought to be able to create a new text file (.txt file) in the same folder/location as the PM Master database (pm\_tabs.mdb), save this text file, then edit this text file and resave it, and then delete this text file. If you cannot do all of this, then that computer does not have adequate network permissions to run PM Master.
5. From each computer, start PM Master using the "PM Master X.XX" icon on the desktop. If the "pm\_tabs.mdb" file was properly deleted in step 3 (or moved in step 2), then upon startup PM Master will prompt the user to use a dialog to select the back-end location (location of pm\_tabs.mdb). Use the dialog to browse to the pm\_tabs.mdb file you had moved to the server or shared folder in step 2. PM Master will then open connected to this data source upon each startup.
6. If a logon with username and password is desired, consult the User's Guide (accessible from the main screen or "switchboard" or from the help menu after starting PM Master) for instructions on enabling security. Note: regardless of whether a single-user or multi-user setup is used, security is activated on each PC, individually. If you intend to proceed to import data from a previous version of PM Master, then do not add any data to the "Actual" actual database (or else importing will not be allowed).

## **Importing Data from a previous version of PM Master**

1. Start PM Master using the icon/shortcut named "PM Master X.XX" on your desktop (from any PC if using a multi-user setup).
2. Without adding data, ensure PM Master Basic v1.4 generally works. For example, ensure you can access data entry screens, or the tutorial database, etc. Do not add any data to the "Actual" database, or else importing will not be allowed.
3. Ensure the "Actual" database in PM Master 1.4 is empty (if not, then an error will occur when attempting to import).
4. Ensure the previous version database is accessible from the PC to which you are installing PM Master Basic v1.4. If the old version is on a different, disconnected PC, then copy the back-end/data file (pm\_tabs.mdb) over to the new PC using a flash drive, CD or other electronic media. Either way, ensure you know the folder location and name of your backend/data file (again, pm\_tabs.mdb is the name; the location varies). If unsure where your backend/data file, pm\_tabs.mdb, resides, you may use your Backup Data function from the old edition/version of PM Master to locate and even make a copy of pm\_tabs.mdb (see Data Backup in the table of contents or Help file of the old version for more detail).
5. Ensure the "Actual" database is currently connected. From the Tutorial menu select "Connect Actual Database".
6. From the Switchboard screen, choose the File menu, and then "Import Database from Previous Edition/Version...". This will launch a common dialog or browser.
7. Browse to the folder containing the old backend/data file (pm\_tabs.mdb), select pm\_tabs.mdb, and click the Open button. Your data should be imported, and a message will be displayed to that affect.
8. Click the various data screens (Equipment, Task Groups, Tasks, Replacement Parts, Suppliers, etc.) to see your imported data.
9. Review all data to ensure it was imported correctly, and contact TQS Associates if any problem is encountered before continuing to use PM Master.
10. Optional step: once you are sure your data has been imported fully and successfully, you may wish to uninstall the previous edition/version of PM Master. For version 1.3, use the Windows uninstaller. For version 1.2, a) Delete the installation folder (and its contents) for the old version (c:\prevent if the default was used). b) If the old edition/version was installed as a multi-user database, then also delete the old backend folder (and its contents). c) Delete the PM Master program group by choosing the Start menu, then Programs, highlighting the PM Master group and right-clicking and choosing delete.

## **Converting from a single-user installation to a multi-user installation**

Before converting PM Master to a multi-user installation, it is suggested the user make a current backup of the database, as a precautionary measure.

1. Ensure the "Actual Database" is connected (and not the tutorial database; the actual database is connected upon initial installation by default), and then close PM Master. Then, move (not copy) the file "pm\_tabs.mdb" from the PC's install location to the desired server or shared folder location. If unsure of the install location, you can use the "Installation and Connection Information" function (available from the File menu when the main screen or Switchboard is visible) to help identify the full path to pm\_tabs.mdb. Note that on some operating systems, some of the folders or files in the install location path may be hidden, and you will need to set folder options to "show hidden files and folders" in order to locate the file "pm\_tabs.mdb".
2. Ensure the PC has FULL network permissions for the shared folder containing "pm\_tabs.mdb", including read, write, and even delete permission (security restrictions can be set later within PM Master menus). Network permissions are typically set by an IT administrator. Here is an optional, but good test for adequate network permissions (that anyone can do): From each computer, you ought to be able to create a new text file (.txt file) in the same folder/location as the PM Master database (pm\_tabs.mdb), save this text file, then edit this text file and resave it, and then delete this text file. If you cannot do all of this, then that computer does not have adequate network permissions to run PM Master.
3. Upon next startup, PM Master will prompt the user to use a dialog to select the back-end location (location of pm\_tabs.mdb). Use the dialog to browse to the pm\_tabs.mdb file you had moved to the server or shared folder in step 1. PM Master will then open connected to this data source upon each startup.
4. The original single-user copy of PM Master is now converted to a multi-user copy. To install additional PC's, follow instructions under "Setup on a Network (Multi-User setup)", above. Skip step 2 - you already have a copy of "pm\_tabs.mdb" in the server or shared folder location - a copy containing your data. Overwriting this copy of pm\_tabs.mdb with a copy from another PC would be replacing it with an empty copy, effectively erasing your data.



## **Moving data/backend from one server location to another location**

Before moving the data/backend, it is suggested the user make a current backup of the database, as a precautionary measure.

1. Ensure the "Actual Database" is connected (and not the tutorial database) on all computers, and then close PM Master on all computers. Then, move (not copy) the file "pm\_tabs.mdb" from the current server or shared folder location to the new server or shared folder location. If unsure of the current server or shared folder location, you can use the "Installation and Connection Information" function (available from the File menu when the main screen or Switchboard is visible) to help identify the full path to pm\_tabs.mdb. Note that on some operating systems, some of the folders or files in the install location path may be hidden, and you will need to set folder options to "show hidden files and folders" in order to locate the file "pm\_tabs.mdb".
2. Ensure each PC has FULL network permissions for the new server or shared folder location containing "pm\_tabs.mdb", including read, write, and even delete permission (security restrictions can be set later within PM Master menus). Network permissions are typically set by an IT administrator. Here is an optional, but good test for adequate network permissions (that anyone can do): From each computer, you ought to be able to create a new text file (.txt file) in the same folder/location as the PM Master database (pm\_tabs.mdb), save this text file, then edit this text file and resave it, and then delete this text file. If you cannot do all of this, then that computer does not have adequate network permissions to run PM Master.
3. Upon next startup on each PC, PM Master will prompt the user to use a dialog to select the back-end location (location of pm\_tabs.mdb). Use the dialog to browse to the pm\_tabs.mdb file in the new server or shared folder location. PM Master will then open connected to this data source upon each startup.