

UpLine v3.2.1 - Detailed Installation Instructions

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1. Software Installed As Part Of This Release

1.1 UpLine v3.2.1.

See the Phase Software webpage for further details of UpLine:

<http://www.phasesoftware.co.uk>

1.2 Microsoft® Data Access Components (MDAC) 2.8 – only installed for users with operating systems earlier than Windows XP Service Pack 2.

See the following Microsoft® webpage for further details on MDAC 2.8:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=6c050fe3-c795-4b7d-b037-185d0506396c&DisplayLang=en>

1.3 Microsoft® MSDE 2000 Service Pack 3a.

See the following Microsoft® webpage for further details on MSDE 2000 Service Pack 3a:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=90dcd52c-0488-4e46-afbf-acace5369fa3&DisplayLang=en>

1.4 Microsoft® Word Viewer 97-2000 for Windows® 95 and Windows® NT (32 bit).

See the following Microsoft® webpage for further details on Word Viewer 97-2000:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=0e56d944-38f6-4eb5-aca6-8bd280d5e6b1&displaylang=en>

2. Minimum System Requirements

- 2.1 The minimum system requirements for UpLine can be found on the Phase Limited website at <http://www.phasesoftware.co.uk> and, once UpLine has been installed, in the help. You are advised to read about these minimum system requirements prior to installing UpLine.

3. Installing UpLine for the first time

IMPORTANT:

Please do not attempt to do anything else on your PC whilst UpLine is installing, otherwise you may miss an important message or prompt and UpLine may fail to install properly. If the installation appears to halt, minimize all windows and attempt to locate the hidden window.

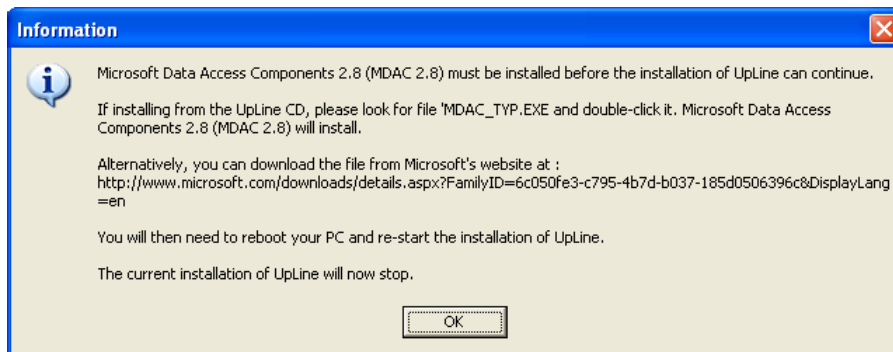
- 3.1 The user must be logged in with Windows® System Administrator rights.
- 3.2 Settings under the Windows® operating system for UpLine:
 - 3.2.1 From the Control Panel, select “Regional & Language Options” (older operating systems have a “Regional Settings” option). Set the language/country, currency symbol, date format and time format. You may be prompted to reboot your PC for any changes to take effect.

IMPORTANT:

- i) The Short Date format should be set to one of “dd/MM/yy”, “dd/MM/yyyy”, “MM/dd/yy” or “MM/dd/yyyy”.
 - ii) The time format should be set to “HH:mm:ss”.
 - iii) While other formats and separators may be treated correctly in data entry and reflected correctly in displays, they are not formally supported within UpLine and they could generate unpredictable and/or inconsistent results. In particular, spaces should not be used as a separator within date or time control panel settings and the same separator should not be used for both times and dates.
 - iv) See the help within UpLine for more information on date and time formats.
 - v) The settings in the Control Panel may be changed at a later point in time, if required.
- 3.2.2 From the Control Panel, select “Display”. Go to the “Settings” tab. The “Screen resolution” (or “Screen area” in older operating systems) should be set to a minimum of “1024 by 768 pixels”.
- 3.3 If you are running **Microsoft® Windows® XP Home Edition/Professional with Service Pack 1** then you must install Microsoft® Data Access Components (MDAC) 2.8 **before** the rest of UpLine. Look for the file “MDAC_TYP.EXE” on the UpLine installation CD or download it from the Microsoft website (see point 1.2 above). Double-click the file to install MDAC 2.8. Follow the instructions and **reboot your PC if told to**. You can then proceed with the installation of UpLine.

Note that this manual step is not necessary for Microsoft® Windows® XP with no Service Pack, Microsoft® Windows® XP with Service Pack 2, or other versions of the Microsoft® Windows® operating system.

Should you skip this step with Microsoft® Windows® XP with Service Pack 1 and then attempt to install UpLine, you will see a window very similar to the following:



- 3.4 Either download the file “UpLineSetup030201.exe” from the Phase Software website or insert the UpLine installation CD. If using a CD, the setup should automatically start. If the setup does not automatically start or you have downloaded from the website, locate the file on the CD or hard disk and double-click it.

Note that if UpLineSetup030201.exe is selected for a second time after installation, you will see the options to either Upgrade UpLine (see section 4) or to Remove UpLine (see section 6).

- 3.5 IMPORTANT: After the initial ‘Welcome’ window, you will be prompted to disable the following applications for the duration of the installation, in order that UpLine can install completely and correctly:**

Anti-virus software

Windows® Registry Editor

Windows® Event Viewer

If known, any other applications and services that use ODBC

Once done, select NEXT to continue with the installation.

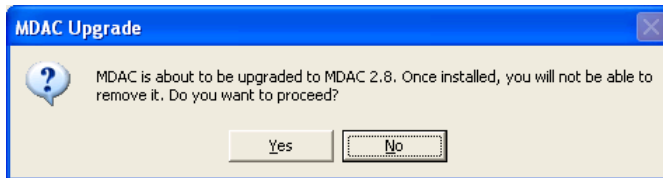
- 3.6 You will then need to select the destination folder for the UpLine installation. The default path is “C:\Program Files\UpLine”. The “Browse” button can be used to change this.

You will receive a warning if you select a folder that already exists. Files in this existing folder may be overwritten, so please consider your choice carefully.

Note that MSDE 2000 SP3a will automatically install in part to destinations “C:\Program Files\Microsoft SQL Server\80” and “C:\Program Files\Microsoft SQL Server\MSSQL”. Some Windows® system files will also be installed on the “C:” drive.

- 3.7 You will see one final message summarising your selection. Select “Next” to start the installation.

- 3.8 MDAC 2.8 will be only installed if an older version exists on your PC (note that Microsoft® Windows® XP Service Pack 2 includes MDAC 2.8 so it does not install again with UpLine). If MDAC 2.8 is to be installed, you will be prompted as follows:

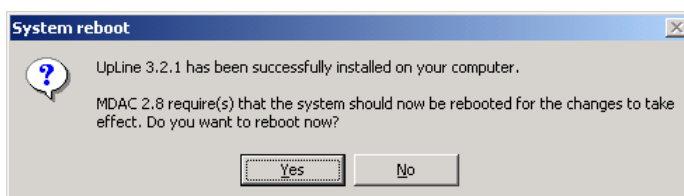


Select “Yes” to continue with the installation and “No” to abandon it.

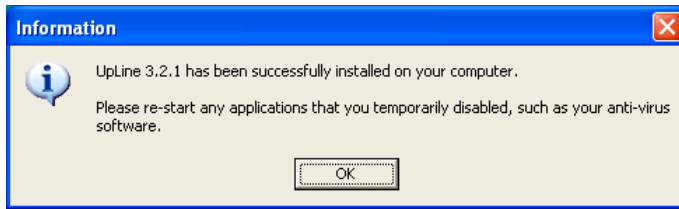
- 3.9 The rest of the installation will take a few minutes to complete. Both Microsoft® MDAC 2.8 and MSDE 2000 SP3a will be installed without the screen being updated, so it may appear for a short while that nothing is happening. Please be patient and wait for the installation to proceed.
- 3.10 Microsoft® Word Viewer 97-2000 will also be installed (but only if a copy does not already exist). Where “Microsoft® Word” has already been installed, you will see the following window. **IMPORTANT: Select “Open with Word”.**



- 3.11 Depending on your operating system, MDAC 2.8 and/or MSDE 2000 SP3a may require your system to be rebooted, in which case you will be prompted accordingly. Select “Yes” to reboot now, “No” to reboot later. Please note that UpLine may not work properly until you have rebooted your system.



- 3.12 Otherwise, a window similar to the following should appear to advise you that UpLine has been successfully installed.



- 3.13 You may now restart any of the following items closed for the installation:
- Anti-virus software.
 - Microsoft® Event Viewer
 - Microsoft® Registry Editor
 - All applications/services that use ODBC
- 3.14 “UpLine” should appear both on the Desktop and on the Start Menu (select Programs then UpLine).

4. Installing UpLine v3.2.1 over an earlier version of UpLine (Upgrade)

IMPORTANT:

Please do not attempt to do anything else on your PC whilst UpLine is installing, otherwise you may miss an important message or prompt and UpLine may fail to install properly. If the installation appears to halt, minimize all windows and attempt to locate the hidden window.

4.1 You should **make a backup of your database before upgrading to UpLine v3.2.1**, should you be unfortunate enough to encounter problems with the upgrade. From within UpLine, select the “Backup database” option from the “Files” menu then copy the resulting backup file to a safe location, e.g. to CD.

4.2 The user must be logged in with Windows® System Administrator rights.

4.3 Either download the file “UpLineSetup030201.exe” from the Phase Software website or insert the UpLine installation CD. If using a CD, the setup should automatically start. If the setup does not automatically start or you have downloaded from the website, locate the file on the CD or hard disk and double-click it.

You will see the options to either “Upgrade UpLine” or to “Remove UpLine”.

4.4 Select the option to “Upgrade UpLine” and UpLine will be upgraded to v3.2.1.

4.5 Start UpLine. You are given a further chance to backup your database (in case you have not done this yet).

4.6 You will then be asked if you wish to apply the new database update. Respond "Yes" and the database will be upgraded to the configuration required for v3.2.1. UpLine will then close.

4.7 Start UpLine again. You are now ready to use the new version of UpLine.

5. Starting UpLine For The First Time

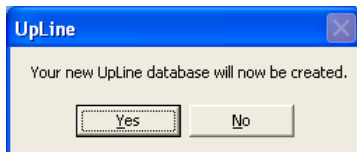
- 5.1 Select UpLine from the Desktop or from the “Start/Programs” menu. UpLine will initialise the MSDE instance and the UpLine database.

You will see an “UpLine loading...” window that may have a message on it, similar to:

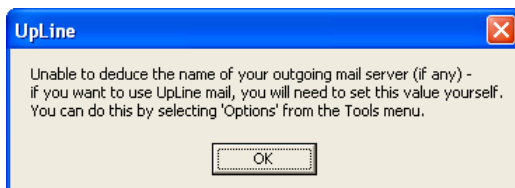


This window will be displayed for a few seconds whilst the MSDE database service is started. Please be patient.

- 5.2 The UpLine database will then be created. Select “Yes” to continue at the window or “No” to abandon the set up and initialisation.

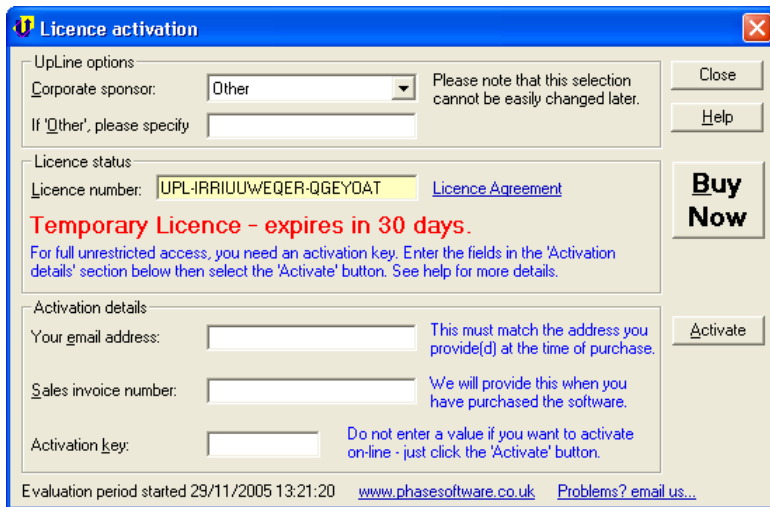


- 5.3 UpLine will attempt to deduce the name of the mail server used on your PC to send emails. This name will be placed in the options settings under UpLine (on the Tools menu). If no outgoing mail server is deduced you will see the following window:



Select “OK” to continue.

5.4 You will be presented with the Licence Activation window. In this window, you will need to select the Corporate Sponsor and enter your licence activation details. See the help for more information.



You MUST select a Corporate Sponsor. This setting may be changed later (select Options from the Tools menu) but ONLY if no detail records have been added to UpLine. This is because the Corporate Sponsor setting determines the handling of records within UpLine and their structure cannot be changed – these records will have to be removed before the Corporate Sponsor setting can be changed.

Should you already have an Activation Key, enter it into the “Activation details” area of the window and select the “Activate” button to activate your UpLine licence.

To obtain an Activation Key, you must first purchase a copy of UpLine. You can do this by selecting the “Buy now” button to go the Phase Software website. Once purchased, you will be given a Sales Invoice Number. Enter your email address used at the time of purchase and the Sales Invoice Number supplied into the “Activation details” area of the window, then select the “Activate” button to connect to the Phase Software website. An Activation Key will automatically be supplied and your UpLine Licence activated.

Otherwise, you can choose to proceed without purchasing a copy of UpLine and entering the Activation Key: just select the “Close” button. You will be granted a temporary licence, valid for 30 days. The licence can be activated at a later date from within UpLine by selecting the “Licence” option from the “Help” drop-down menu.

Should you be unfortunate enough to encounter problems with activating your licence, click on the “Problems? Email us” link on the bottom right of the Licence Window in order to email Phase Software Limited (licence@phasesoftware.co.uk).

5.5 You are now ready to start using UpLine. If you are new to UpLine, go to the Quick Start Tutorial. This can be found on the Help menu.

6. Removing UpLine

IMPORTANT:

Please do not attempt to do anything else on your PC whilst UpLine is being removed, otherwise you may miss an important message or prompt and UpLine may fail to be removed properly. If the removal process appears to halt, minimize all windows and attempt to locate the hidden window.

6.1 You are advised to make a backup of your database before removing UpLine. Select the “Backup database” option from the “Files” menu within UpLine, then copy the resulting backup file to a safe location, e.g. to CD.

6.2 Go to the “Add or Remove Programs” option on the Control Panel. Select the “Change/Remove” button for “UpLine”. Ignore entries in the list for “Microsoft® SQL Server Desktop Engine (UPLINE)” and “Windows® Word Viewer 97” as these will automatically be removed with UpLine.

Follow the prompts. All components relating to UpLine will be removed, except for MDAC 2.8, which cannot be uninstalled.

6.3 The UpLine installation folder (default is “C:\Program Files\UpLine”) will be retained and will contain some temporary log files as well as data. You may wish to backup the folder before manually removing it.

7. Changing the location of UpLine

IMPORTANT:

Please do not attempt to do anything else on your PC whilst UpLine is installing or being removed, otherwise you may miss an important message or prompt and UpLine may fail to install or be removed properly. If the installation/removal process appears to halt, minimize all windows and attempt to locate the hidden window.

7.1 To change the folder in which UpLine is installed, you must first backup your database, then remove UpLine, then re-install UpLine (see sections 6 then 3 and 5 above).

7.2 To backup your database before removing UpLine, select the “Backup database” option from the “Files” menu within UpLine, then copy the resulting backup file to a safe location, e.g. to CD.

7.3 Once UpLine is re-installed in the new location, you can restore your saved database by selecting the “Restore database” option from the “Files” menu within UpLine.