

4TQ Toolkit R6

Network Installation Notes:



Overview

This software may be installed on LAN networks.

If you are installing onto a peer to peer network, and the software will also run on a PC that is acting as a file server, please follow the **Peer to Peer** notes (Page 5).

If you are installing on a dedicated server, please follow the **Dedicated Server** notes (Page 4). After installing the applications onto the server, follow the Workstation installation notes for each Workstation in turn.

If you are installing on a **Microsoft Terminal Server** installation please refer to page 7.

The directory locations and structures used by the 4TQToolkit are explained on page 3 of this note. **You should review the directory information and decide beforehand the location and drive mapping(s) that will form your layout.**

Anti Virus programs may interfere with the 4TQ installation Program. Please ensure it is disabled while installing the 4TQ applications. Remember to re-enable your Anti-Virus application after completing the installation.

System Requirements

	Minimum	Recommended
<i>Operating System:</i>	Windows 95b / 98 / 98SE / Me Windows NT4.0 Sp3 Windows 2000	Windows 98SE / Me (IE5.5) Windows NT4.0 Sp3 or higher Windows 2000
<i>Video:</i>	VGA	SVGA (800x600) or better
<i>RAM:</i>	Refer to specific OS.	Refer to specific OS.
<i>Network:</i>	Windows Compliant	Windows Compliant
<i>App Disk Space:</i>	25 Megabytes	25 Megabytes
<i>User Disk Space:</i>	35 Megabytes	100 Megabytes

Companion Applications

<i>Word Processor:</i>	MSWord 97 (8) / 2000 (9) WordPerfect 7 / 8 (For use with 4TQFlow)	MSWord 97 (8) / 2000 (9)
<i>HTML Browser:</i>	HTML 2.0 compliant (For use with 4TQWebGen Type 1)	MSIE5.5 or higher
<i>Email Features:</i>	MAPI compliant.	

Selecting Directories for Single & Multiple site Network Installations

General Recommendations:

There are three key file locations required for a network installation of the 4TQToolkit.

Before installing the software for use by your users, the location of these three directories must be decided. Altering the locations after the installation of the workstation(s) is not a supported option. Contact Axion Support if the need to alter these locations arises.

First Step:

Select the location of the "ProgramDir" Folder.

This folder is used for the actual Executable's and Libraries. It will also contain Sub-folders.

It must consist of a mapped Drive identifier and at least one directory. Do not use UNC forms. Do not use a "root" drive.

All files in this Directory Structure must be available with "read and execute" permissions. On Novell systems the "Shared" attribute must set on. Write permission is not needed or recommended.

As a general guide the ProgramDir should co-located with any other general use applications to assist with administration and minimise drive identifier usage. For example if X: drive is used as a common source drive of applications then X:\4TQ would make a suitable ProgramDir location.

When the 4TQToolkit Software is to be provided to the user community by more than one server and the users require access to a common data area, it is essential that all users access the programs with exactly the same drive identifier and folder.

Second Step:

Select the location of the Systempath.

This folder is used by the user community to store their work (data files). It also contains configuration files that are accessed and controlled by the 4TQ administrator.

It must consist of a mapped Drive identifier and at least one directory. Do not use UNC forms. Do not use a "root" drive.

Unlike the ProgramDir, the SystemPath must be consistently mapped for all users. One of the key functions of the 4TQToolkit is in its internal ISO9000 compliant version and access control features. Failure to use a consistent drive identifier and directory for the SystemPath **will cause users to be denied access**.

It is strongly recommended that the actual SystemPath Folder be available in Write mode only for the 4TQSystem administrators and Process Owners (people who will author and modify documents). The remaining general users only require read access.

Training participants will need Write mode.

Third Step

Select the location of the WebRoot.

This location is used to accept the generate output of the Web site Generator. You do not need to alter the default if the 4TQWebgen product is not included in your license. The default location is a sub-folder of the SystemPath. It may be relocated as required. Ensure consistent Drive Identifier mapping is used for all users. 4TQWebGen can be set to run a batch or command script when the site generation as been completed. You can use this feature to re-locate or duplicate the site contents as required.

Commencing the software Installation

Once these locations have been defined, proceed with the installation as described in the following pages.

Directory Structure Details

The Setup Installation Program(s) has a Set Directories dialog to provide easier initial application configuration options. The new dialog is available when performing a "Custom" installation from the "Set Directories" button (upper right) of the Custom Installation Dialog.

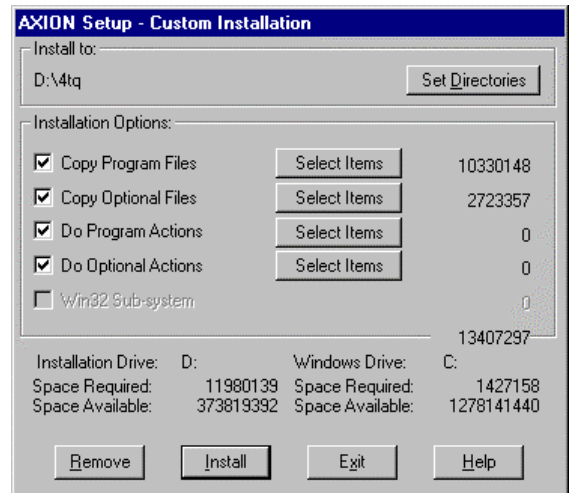
General Recommendations

When creating directories (folders) try to maintain the DOS 8.3 convention. If this is not possible, try to avoid long pathnames with whitespace characters or dos reserved characters. Especially do not use folder names with two whitespace characters or the "." character. The ShellExec function on some OS versions can in some cases misinterpret such names with unpredictable results.

Program Path

The Program Path location is used by all 4TQ component applications for executable (.exe) and Dynamic Link Libraries (.DLL). It is essential that all 4TQ application component applications be located in the same directory.

The Program Path is viewable after installation from 4TQFlow Options Customise Dialog. It cannot be changed from within the dialog. Users require "Read" access right to this directory.



System Path

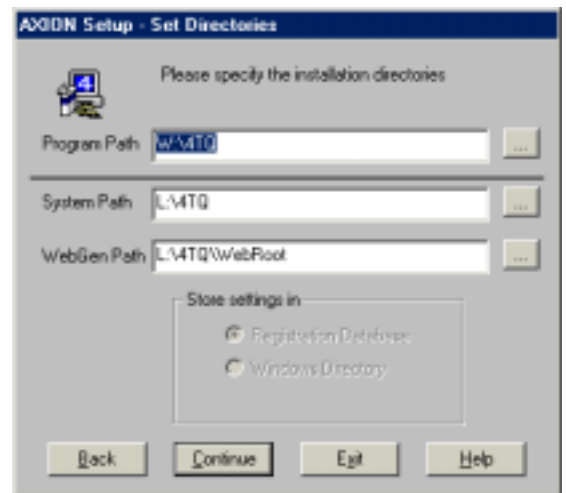
The System Path defines the location where the 4TQ applications will store your data files. **Users who will create and modify Process Maps will need "Write" access rights to this directory.**

The System Path is used by 4TQFlow, 4TQExplorer and 4TQWebGen to define the top level Directory of the 4TQ Process Guardian System area. When the 4TQ Process Guardian features are activated 4TQFlow maintains an ISO9001/2.3 element 4.5 compliant protective shield over Process Map files located within or below the SystemPath directory.

4TQWebGen uses the SystemPath setting to define the upper boundary directory of the Process Maps and 4TQExplorer files that it will be included in the Generated Web-Site.

4TQExplorer uses the SystemPath setting to locate "Company System" 4TQExplorer perspective files that appear on 4TQExplorer's File menu.

As a general principal it is worth creating folders (directories) under the SystemPath for users to store specific process maps and reference and Policy documents. In such cases it may be advantageous to restrict the SystemPath to read-only rights for all users, and then specifically grant the Process Management System administrator's account write permission to the SystemPath Folder and sub folders. Process Owners and Process Reviewer as a group can be granted write permission to the areas covered by the SystemPath's Sub-Folder as required.



The Systempath contains the following sub-folders.

Archive

The ArchivePath is used by 4TQFlow to place the archived Process Map files. The same relative pathing is maintained from the ArchivePath location to the archived files as was the pathing of the current version Process Map file relative to the SystemPath. Both the SystemPath and ArchivePath locations must be valid for the 4TQ Process Guardian feature to be active.

Users who will create and modify Process Maps will need "Write" access rights to this directory.

Macros

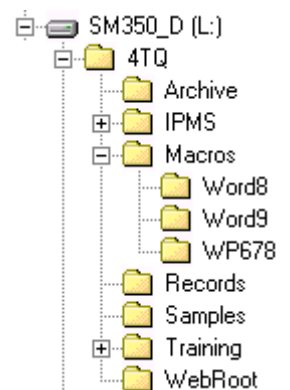
The Macro folder contains sub-folders for each Word Processor version supported.

Template

The Template Path setting is used by 4TQFlow, and the Word-Processor Template macros to locate the 4TQ Template file (.FLT). Normally users require "Read" access right to this directory and in most cases it should be the same as the Program Path directory.

Records

The Record Path is only used by the 4TQ Word-Processor template macros. This directory is used to store the reference files used by the macros and also the MacroLog.csv file which records the generation of Process Report Documents. **Users who will generate documents from 4TQFlow will require Read / Write access to this directory.**



WebGen

The WebGen Path defines the default target location of the HTML files generated by 4TQWebGen.

Dedicated Server Notes:

The Software must be installed from a Workstation connected to the Server.

- Map a Drive(s) to the location(s) on the Server that you wish to install the applications. Make sure the Drive identifiers are same one that will be used by the other workstations. Ensure that you have full rights to the mapped network drive, and the local machine's Windows and System directories and the registry.

- Close all other applications on the workstation.

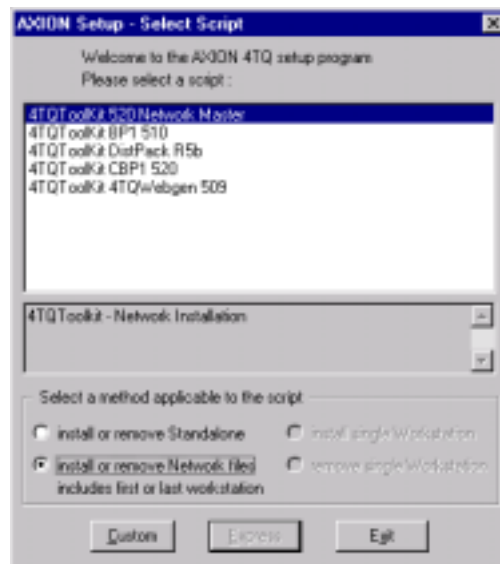
- Disable virus-checking utilities.

- Run the Setup.exe program from the CD-ROM's QuickStart Menu

- If a Select Script dialog appears then

Select the "Network master" script, click the **"install or remove Network files ..."** Radio button and Click the Custom button.

If the Express or Custom dialog is displayed, select the Custom Option and then select the Network Installation Option.



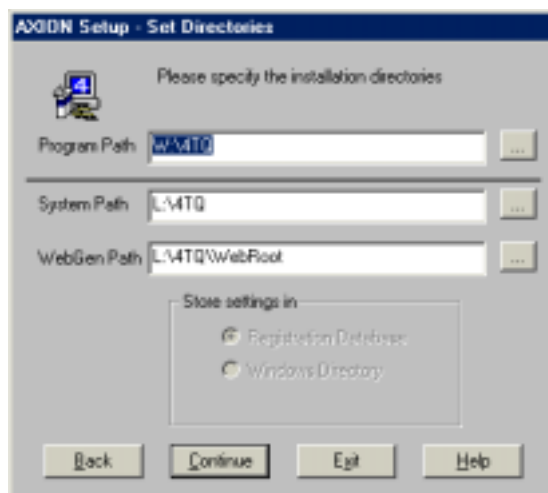
If you are performing a Standalone installation the Custom installation dialog will be displayed. If you are performing a Network Installation the **"Set Directories"** dialog be displayed as shown below.

- Click the **"Set Directories"** button (if required) and set the files locations as required. If you selected the "install or remove Network files..." the Set Directories dialog will automatically displayed.

An explanation of the use and rights required for each directory is included at the start of this document.

The Program Path sets the location of the application's executable components and users only require read execute access to this directory. Changing the Program Path will update all the paths listed below it

The System Path sets the main location of the user data area. In general terms users require write access to this folder and it's sub folders. Altering the System Path will update all of the paths below it. **Always ensure that all of the path locations include a directory, avoiding the use of the "root" directory of a drive.**



The Browse buttons on the right of each field can be used to navigate and select the required directory locations if they already exist.

When all of the directories have been set as required Click the **Continue** button to return to the Custom Installation dialog. The path information is recorded and used to setup each workstation. It is important to enter this information exactly as required as this information is recorded on the server's script copies and will be used by the setup program for each workstation.

- Click the **Install** button.

The Setup program will record its actions in a text file (setup.log), in the temporary directory, on the installing workstation during installation. If the installation is successful, the setup.log file is moved (appended) to the 4TQ-application directory.

The Setup.log file may be reviewed in a text editor.

- After the Setup program has completed, test the application(s).

Special note for Novell server installations

If you have installed the 4TQ program files on network where they will be shared by a number of users you must change the Novell attributes of all .exe and .dll files in 4TQ program directory to ReadOnly and Shared.

Workstations must now be installed from the network 4TQ directory. Follow the Workstation Installation Notes for each Workstation in turn.

Workstation Installation Notes:

The 4TQ applications must be correctly installed on your server before attempting to install any Workstations.

To install the 4TQ applications on a Workstation follow the steps below.

- Log-on to the network.
- Close all other applications on the workstation including Anti-virus applications.
- Map the required Drives to the locations of the 4TQ applications on the Server. Ensure the Drive identifiers used are the same as the Drive identifiers used during network installation procedure.
- Run the setup.exe program from the 4TQ-application directory.
- Select the desired script for this workstation, check the **install single Workstation** option and then click the Express button.
- Wait for the program to complete and the application(s) to be displayed.
- Check the user's permissions are as required.

Workstation Un-install Notes:

To remove the 4TQ applications on a Workstation follow the steps below.

- Log-on to the network.
- Map a Drive to the location of the 4TQ applications on the Server. Ensure the Drive identifier used, is the same as the Drive identifier used during network installation procedure.
- Run the setup.exe program from the 4TQ-application directory.
- Select the desired script to be removed, check the **remove single Workstation** option and then click the Express button.
- Wait for the program to exit.

Peer to Peer Notes:

If the PC that will act as a file server for 4TQ applications is running Windows95/98, please refer to *Special Windows95/98 Server notes* below.

- From a workstation, map a drive identifier to the location on the Server machine, where you wish to create the 4TQ applications directory structure. Make a note of the Drive identifier you use. You must use the same identifier to install all of the other workstations. Ensure that you have full rights, to the mapped network drive, and the local machine's Windows and System directories.
- Close all other applications on the workstation.
- Disable virus-checking utilities.
- Run the Setup.exe program, and select the Custom option.
- Select and click the "**install or remove Network files.**" button.
The Custom installation dialog will be displayed.
- Click the "Set Directories" button alter the file location to the required mapped network Drives and paths. Ensure that the application directory (default: C:\4tq) is located in a directory under the Mapped drive. **Do not install 4TQ applications into the root of a Mapped Drive. Always install the software in a Directory (folder) of a mapped Drive**
- Click the **Install** button.
You will be prompted to change disk if required.
The Setup program will record its actions in a text file (setup.log), in the temporary directory (environment variable TEMP or TMP), on the installing workstation during installation. If the installation is successful, the setup.log file is moved (appended) to the 4TQ-application directory.
- After the Setup program has completed, test the application(s).

You can now install the other Workstations directly from the network. Please refer and follow Workstation Installations notes below.

Special Windows 95/98/Me Server notes.

Windows95/98 does not support drive mapping (redirection) of a local hard disk. If your network consists of WindowsNT / 2000, and Windows95/98/Me machines, it is recommended that the application be installed on a WindowsNT /2000 machine. If this is not possible, and you wish to use the applications on the Windows95 machine that is acting as a Server, follow the steps below.

Note: 4TQExplorer must not share files with the other Workstations.

- From a workstation, map a drive identifier to the location on the Server machine, where you wish to create the 4TQ applications directory structure. Make a note of the Drive identifier you use. You must use the same identifier to install all of the other workstations. Ensure that you have full rights to the mapped network drive, and the local machine's Windows and System directories.
- Close all other applications on the workstation.
- Disable virus-checking utilities.
- Run the Setup.exe program and select the Custom option.
- Select and click the "**install or remove Network files.**" button.
The Custom installation dialog will be displayed.
- Click the "Set Directories" button alter the file location to the required mapped network Drives and paths. Ensure that the application directory (default: C:\4tq) is located in a directory under the Mapped drive. **Do not install 4TQ applications into the root of a Mapped Drive.**
- Click the **Install** button.
You will be prompted to change disk if required.
The Setup program will record its actions in a text file (setup.log), in the temporary directory (environment variable TEMP or TMP), on the installing workstation during installation. If the installation is successful, the setup.log file is moved (appended) to the 4TQ-application directory.
- After the Setup program has completed, test the application(s).
- Exit the 4TQ applications on the Workstation.
- Move to, and Logon to the Windows95 Server Workstation.
- Run the Setup.exe program from the 4TQ applications directory.
- Select the Custom installation option.
- Select the Workstation installation option. (NB: Do not use the Standalone or Network Installation option.)
- Enter the Workstations User Name and Company Name.
- Wait for the program to complete.

You can now install the other Workstations directly from the network. Please refer and follow Workstation Installations Notes below.

Installation Notes for Microsoft Terminal Server

The 4TQToolkit installation consists of two steps. First the software must be installed on the server. Once installed on the server a workstation installation needs to be performed for each client using the software.

Server Installation

1. When the CD is inserted the installation program begins automatically. Cancel the install immediately by selecting the Exit option.
2. Select Add/Remove Programs from Control/Panel.
3. Click Install button.
4. Click Next button
5. The system will try to locate a file called setup.exe. It should find the file on the CD. If a different setup.exe is located use the browse button to select setup.exe on the CD.
6. Click Next button
7. Select the "Install for this user only option".
8. Click Install button.
9. The standard 4TQToolkit installation will commence. The 4TQToolkit must be installed in network mode. To do this select Custom Install followed by Network Installation when prompted during the installation process.
10. At the end of the 4TQToolkit setup 4TQExplorer and the 4TQToolkit help file are opened. Close these applications.
11. When the 4TQToolkit installation is complete click the Finish button on the Install./Remove Programs dialog.
12. The installation of the software on the Terminal Server is now complete.

Client Installation

1. Select Add/Remove Programs from Control/Panel.
2. Click Install button.
3. Click Next button.
4. The system will try to locate a file called setup.exe. The setup.exe that needs to be used is located in the 4TQ Program Directory (where the 4TQToolkit was installed on the server). Use the Browse button to locate this file.
5. Click Finish
6. The standard 4TQToolkit installation will commence. The 4TQToolkit must be installed in workstation mode. To do this select Custom Install followed by Install Workstation when prompted during the installation process
7. The workstation setup is complete when 4TQExplorer and the 4TQToolkit help file are opened.

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