

[inventory management solutions]

ATMS Installation Guide

Each person who needs to work with ATMS must have the ATMS program files installed on their computer. You must ensure this step is completed on each client computer.

You can install ATMS on any number of computers. The concurrent user licence defines how many users have access to ATMS at any one time.

If you are installing an evaluation version of ATMS the database and licence will be installed and configured as part of the installation process. Otherwise it has been assumed that you have already installed the ATMS database and licence file.

You should review all sections of this document before you install or upgrade your ATMS software. Please <u>contact us</u> if you have any questions.

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System Requirements

These are the **minimum** requirements for the client computers on which you install the ATMS software. We recommend that you do not use a machine with a lower specification.

Supported operating systems:

- Windows 7
- Windows 8
- Windows 10

Hardware:

- Processor (CPU) 1 GHz
- Memory (RAM) 1 GB
- Display 1024 x 768 resolution
- 200 MB of hard disk space on each computer for the application files.
- Keyboard and Mouse or compatible pointing device.

Installing ATMS

ATMS Evaluation Setup

Users wanting to evaluate the software should use the ATMS Evaluation Installation file. This installs a demo database and 30 day licence file (extendable on request).

The default login details for ATMS are:

Username: ADMIN Password: admin (Password is case sensitive)

ATMS Standard Setup

 For new client installations (that will connect to an existing database) and to update from an older version please use the ATMS Update Installation file.

Note:

A connection to the Internet might be required in order to download any pre-requisites, such as the .Net Framework, that are required by the application.

Installation Procedure

The ATMS Installation Wizard will walk you through the process of installing ATMS on your computer.

Note:

You will need a Windows user account with Administrator privileges in order to install and configure the software.

- 1. Close all other Windows programs. This lets ATMS update components which are shared by other programs.
- 2. Run the ATMS setup program (Right-click and Run as administrator) to begin the installation process. The wizard verifies the integrity of the setup package. This may take a few moments to complete.



3. If ATMS is already installed on the computer it will need to be uninstalled before installation of the new version can proceed. Choose **Next** to continue.

| ð | ATMS - InstallAware Wizard 🛛 🗕 🗆 🗙 |
|-----|--|
| | Application Requirements The following requirements must be processed before starting setup. |
| | Previous Version Uninstallation |
| | |
| | |
| | To continue, dick Next. |
| ISI | S Online Ltd < <u>B</u> ack <u>N</u> ext > Cancel |

| 5 | ATMS - InstallAware Wizard 🛛 🗕 🔍 |
|-------------------------|---|
| Installing The progr | ATMS ram features you selected are being configured. |
| 12 | Please wait while the Installation Wizard installs ATMS. This may take several minutes. |
| | Status: File: ARVIEW2.OCX, Folder: C:\windows\SysWOW64\ |
| | |
| | |
| ISIS Online Ltd - | |
| | < Back Next > Cancel |

4. If you run the same ATMS Update more than once on the same computer Step 3 will not be displayed and instead you will have the option to either Repair or Uninstall the existing installation. Select an option and choose **Next** to continue.

| 3 | ATMS - InstallAware Wizard 🛛 🗕 🗆 🗙 |
|---|--|
| | Welcome to the Installation Wizard for ATMS |
| | Please choose a maintenance operation to perform: Repair Application Uninstall |
| | To continue, dick Next. |
| | < Back Next > Cancel |

The wizard will skip to <u>Step 9</u> to complete the installation.

5. After any necessary uninstallation steps have completed the Welcome screen will be shown. Choose **Next** to continue.



6. Check the box to accept the terms of the End User License, then choose **Next** to continue.

| 🐻 ATMS - InstallAware Wizard 🗕 🗆 | | | |
|--|----------|--|--|
| License Agreement Please carefully read the following license agreement. | | | |
| END USER LICENCE AGREEMENT | ^ | | |
| 1.1 This Licence Agreement ("Agreement") is a legal agreement between you (acting as an individual or, if applicable, on behalf of the individual or entity on whose computer the Software is installed) and ISIS Online Ltd, whose principal place of business is ISIS Online Ltd, 145 - 157 St John Street, London, EC1V 4PW, United Kingdom ("ISIS") relating to the ATMS Software and related applications and documentation ("Software"). Please read these terms and conditions carefully before downloading or Installing the Software as they contain important information about your rights and obligations. | | | |
| 1.2 By downloading, installing, or otherwise using the Software you agree to be legally bound by this Agreement. This Agreement may be subject to change from time to time and the latest version may be obtained by written request. | , | | |
| ✓ I accept the terms of the license agreement | | | |
| ISIS Online Ltd | | | |
| < <u>B</u> ack <u>N</u> ext > Cancel | | | |

7. The wizard shows you the location where ATMS will be installed on the computer. Use the suggested setting, or change it to another location. If the location does not exist, it will be created as part of the installation process.

| 5 | ATMS - Install | Aware Wizard | _ 🗆 🗙 |
|--|--|-----------------------------|---------------------------|
| Destination Select fold | Folder er where setup will install files. | | |
| Install ATI | 4S to: | | |
| C:\Progra | m Files (x86)\ATMS | | Change |
| Destina Required Remainir ISIS Online Ltd — | tion Folder 1 Disk Space: 1g Disk Space: | | 62,971 KB 1,941,761 MB |
| | | < <u>B</u> ack <u>N</u> ext | > Cancel |

- 8. Specify a folder to hold the program icons for each installed component. Either accept the suggested name or specify a new one. Select how ATMS will be installed for people using this computer, then choose **Next** to continue:
 - ALL Users to make ATMS available for all users with access to the computer
 - **Current User** to make the installation of ATMS available to you only

| 🔂 ATMS - InstallAware Wizard – | | | | |
|---|--|--|--|--|
| Select Program Folder Select the location where you would like to create new shortcuts. | | | | |
| Setup will add program shortcuts to the Program Folder listed below. You may type a new folder name, or accept the suggested name. Click Next to continue. | | | | |
| ISIS Inventory Management | | | | |
| Install this application for: | | | | |
| ISIS Online Ltd | | | | |

9. To modify any settings, click the **Back** button to return to a previously displayed dialog. Otherwise choose **Next** to begin the installation.

| A 🖸 | ATMS - InstallAware Wizard 🛛 🗕 🗆 🗙 | | |
|--------------------------------------|---|--|--|
| | Completing the Installation Wizard for ATMS | | |
| | The Installation Wizard is now ready to configure ATMS on this computer. - Click Next to begin configuration - Click Back to change settings - Click Cancel to exit | | |
| < <u>B</u> ack <u>N</u> ext > Cancel | | | |

During the installation the wizard displays a progress bar to monitor the process:



10. Choose **Finish** to close the wizard and run ATMS.

| 1 | ATMS - InstallAware Wizard 🛛 🗕 🗖 🗙 | |
|----------|---|--|
| | Completing the Installation Wizard for ATMS | |
| | You have successfully completed the Installation Wizard for ATMS. | |
| | Qun now | |
| | To close this wizard, click Finish. | |
| | < <u>B</u> ack Finish Cancel | |

Note:

If you are not installing an evaluation copy (that includes the pre-configured database) or an update uncheck the **Run now** box before closing the wizard. Then refer to the <u>Database</u> <u>Settings</u> section to manually configure the database connection details and other settings before running the application.

Database Update

When you run ATMS following an update or new installation you might be prompted to update your database:

- 1. Ensure you have an up to date <u>backup</u> of your database.
- 2. Choose **Update** to start the database update.



3. When the update has finished choose **Run ATMS**.

| 1 ATMS Database Update | × | | |
|---|----------|--|--|
| Update Complete. | | | |
| Update 2.3.6 Complete Updating ActualCppPerformanceBase Query Start Update:2.3.6 | ^ | | |
| Update 2.3.5 Complete Removing default empty strings. Adding Parent ID fields Start Update:2.3.5 | 1 | | |
| Update 2.3.4 Complete Adding Supplier Cost fields to TransactionLog table | ~ | | |
| Exit |) TMS | | |

Database Settings

On a new installation you will likely need to enter the settings that ATMS will use to connect to the database. If you have installed the software on a corporate network you might need to contact the network administrator for this information. Alternatively you might be able to check the settings on another computer that is already correctly configured to run ATMS.

Note:

Altering program settings for ATMS requires Read and Write (Administrator) access to the folder where ATMS has been installed.

1. Run the ATMS Configuration Utility.

From the Program Group:

| 퉬 ISIS Tool Management |
|------------------------|
| 🔯 ATMS Config |
| ATMS Help |
| 🗒 ATMS |
| 🐻 Uninstall ATMS |

Or directly from the Installation folder:

| 🔯 ATMSConfig.exe | 17/12/2013 17:26 | Application | 188 KB |
|------------------|------------------|-------------|--------|
|------------------|------------------|-------------|--------|

2. Choose the **Database Settings** tab.

| Ø | ATMS Configuration | - | × |
|-------------------|---|----------|---|
| Language Settings | Database Settings Ticket Settings ASRS Interface Cellul | lar ATMS | |

3. Select the type of database and complete the connection details. You are advised to keep the Path (MS Access) or Global Files Path (SQL Server) the same on all computers. If you are in any doubt we recommend you copy the settings from another computer already running ATMS.

Note:

When specifying the Path/Global Files Path you should use UNC paths rather than mapped drives whenever possible.

In a multi-user environment all users should have Read and Write permissions to the Database Folder or Global Files Path.

Microsoft Access:

| ¢ | ATMS Configuration | - 🗆 🗙 |
|---|--|-----------------|
| Language Settings Database | Settings Ticket Settings ASRS Interface Ce | ellular ATMS |
| Database Type C Access C SQL Server | | |
| Path | \\MyServer\ATMS | |
| | | |
| | | |
| | | Test Connection |
| | Exi | t <u>S</u> ave |

The Path refers to the database folder that contains the following files:

| ATMS.MDB | (Database File) |
|----------|-----------------|
| ATMS.MDW | (Security File) |
| ATMS.LIC | (Licence File) |
| ATMS.INI | (Settings) |

Microsoft SQL Server:

| ¢ | ATMS Configuration – 🗆 🗙 | | | |
|--|--|--|--|--|
| Language Settings Database Settings Ticket Settings ASRS Interface Cellular ATMS | | | | |
| Database Type C Access © SQL Server | | | | |
| Server Database Use trusted authentication User Pasword Global files path | SQL_Server_Name ATMS ATMS_User Inconserver_VATMS | | | |
| Test Connection Exit | | | | |

The Global Files Path refers to the licence folder that contains the following files:

ATMS.LIC (Licence File) ATMS.INI (Settings)

4. Test the connection details. If successful **Save** the settings and **Exit** the utility.

Database Backup

We strongly recommend you backup your ATMS database on a regular (at least daily) basis and again before commencing with an upgrade or new installation:

MS Access:

- 1. Ensure all users are logged out of ATMS.
- 2. Ensure third party applications such as the Transfer Agent have been temporarily disabled.
- 3. Backup the ATMS.MDB to a safe location and confirm the integrity of the backup.

MS SQL Server:

1. Ask your database administrator to make a full backup of your SQL database.

User Permissions

After the ATMS software has been fully configured it can be run by a Standard user account with the following privileges:

- Read and Write access to the database path (MS Access) or global files path (MS SQL Server).
- Read and Write access to the **%PROGRAMDATA%\ISIS Inventory** folder and subfolders:

| Permissions for Users | Allow | Deny |
|-----------------------|--------------|------|
| Full control | | ^ |
| Modify | ~ | |
| Read & execute | ~ | |
| List folder contents | \checkmark | |
| Read | \checkmark | |
| Write | ~ | ~ |

Note:

The ATMS Installer should automatically create these folders with the necessary permissions.