



# **Manufacturing Management Software**

## **Installation Guide**

### **Making IT Work**

**Save Time**

**Save Money**

**Improve Performance**

**Comprehenisve - Proven - Affordable**

**[www.match-it.com](http://www.match-it.com)**





# Table of Contents

<b>Installation</b>	<b>5</b>
<b>1 Installing from a CD</b>	<b>5</b>
<b>2 Installing from a download</b>	<b>6</b>
<b>3 Loading the software</b>	<b>6</b>
<b>4 Initialising the software</b>	<b>9</b>
4.1 Starting Match-IT	9
4.2 Log-in	12
4.3 Select options	13
4.4 Your initial desktop	15
4.4.1 Hiding The Desktop	15
4.5 Change Your Password	16
4.6 Apply your licence	17
4.7 Add your initial users	18
4.8 Setup your documents	21
4.8.1 Typical standard document structure	25
4.9 Logging-Out	25
<b>5 Using from a workstation</b>	<b>26</b>
<b>6 Moving the software</b>	<b>28</b>
<b>7 Un-Installing</b>	<b>29</b>



## Installation

This section guides you through the initial installation and setup of the Match-IT software.

The setup description here is the minimum procedure necessary to allow you to run the software.

There are three stages to installing. Stage 1 is to load the software onto your computer. This stage will take about 5 minutes and is described here. Stage 2 is to initialise the software to make it ready to run on your system. This stage will take about 10 minutes and is also described here.

After stage 2 you have a fully operational system that is ready to be used. However, it will not yet know anything about your business. To get from this 'empty' condition to a fully operational state with all your existing information available is likely to take 3 months or more.

### 1 Installing from a CD

If you are installing the software from a CD, place the CD in your drive and after a few moments you will see a screen like this:



If this screen does not appear, the autorun feature on your PC may be disabled, to proceed in this case find the setup program on the CD and double-click on it.

To begin the installation process, click on the **Next>>** button until you get to a page that has a button labelled **Install Match-IT**. Click on this and continue from Loading the software below.

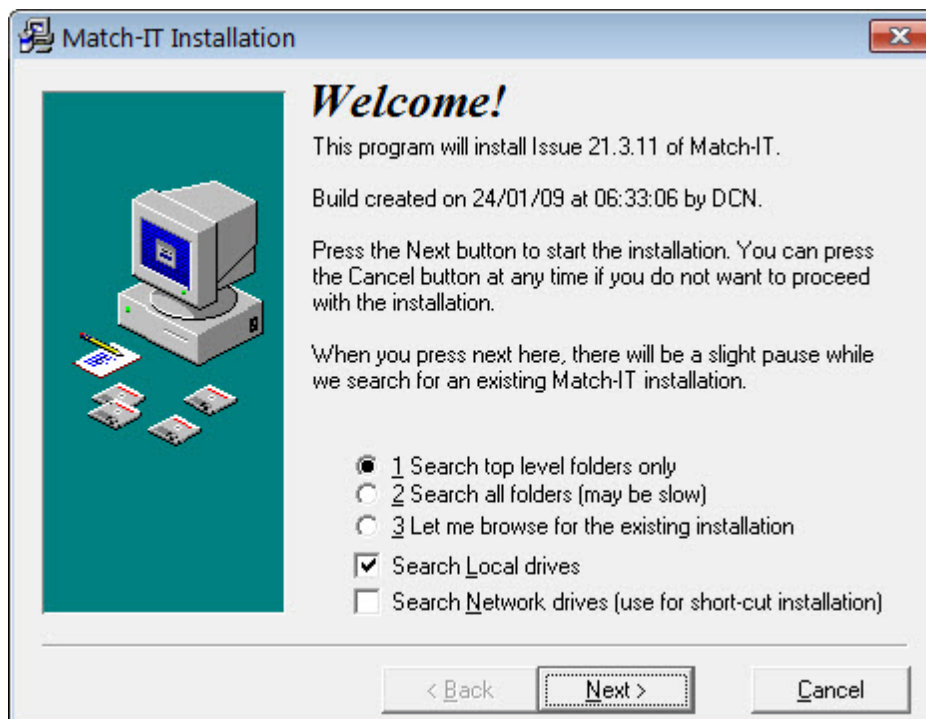
## 2 Installing from a download

If you are installing from a downloaded copy of the software, to start the installation process, run the program you downloaded. You can do this by either finding it in explorer, or by selecting Run from the Start button and browsing to it, and double clicking on it. Then continue from Loading the software below.

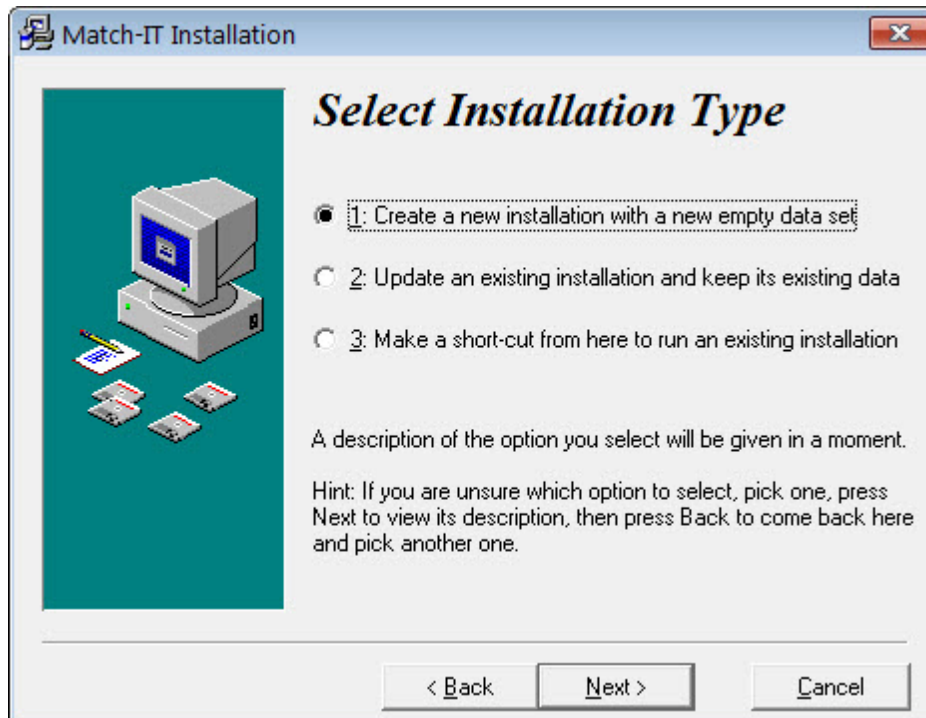
## 3 Loading the software

The software itself is only loaded onto your server (or a workstation you consider to be your server). This section describes how that is done. See Using from a workstation for guidance on how to use the software from a workstation attached, via your network, to you server.

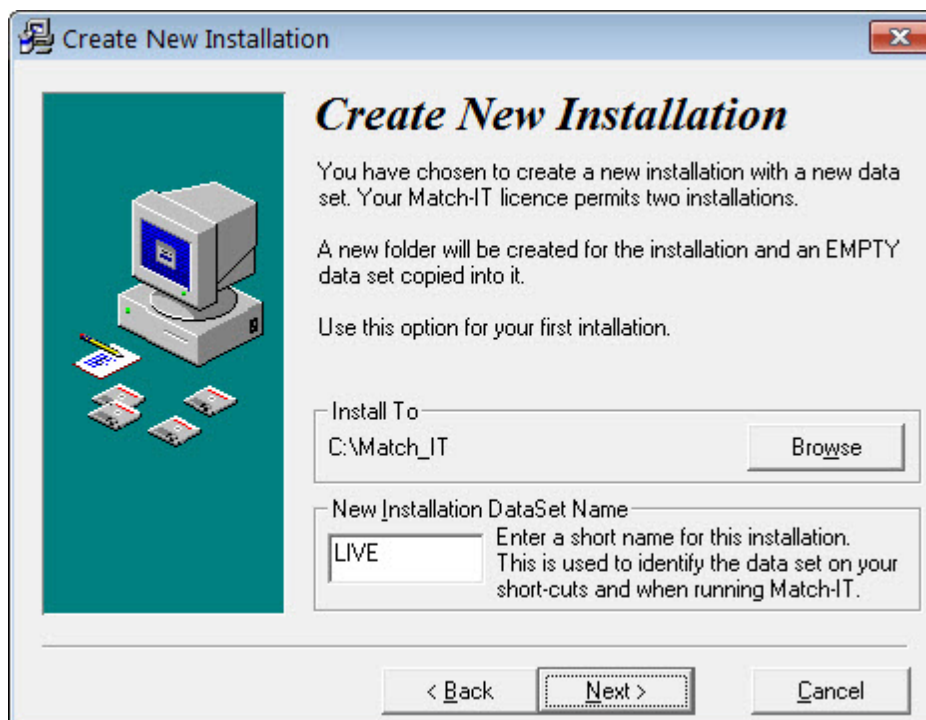
After starting the installation program there will be a slight pause then you will see a welcome screen something like this:



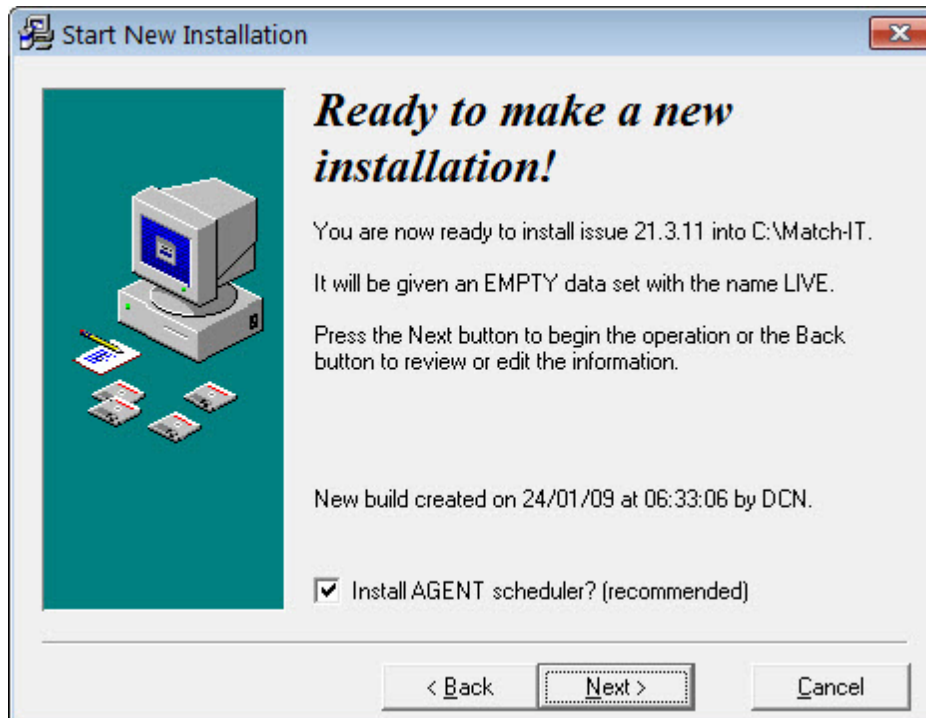
Press **Next** to proceed with the installation. The installation program will search your local disk for an existing installation. The first installation it finds will be offered as the system to be updated. If it doesn't find one, it will only offer the option to create a new installation. After it's done the search you will see a screen something like this:



Select option 1 to create a new installation and press **Next**. You will see a screen something like this:



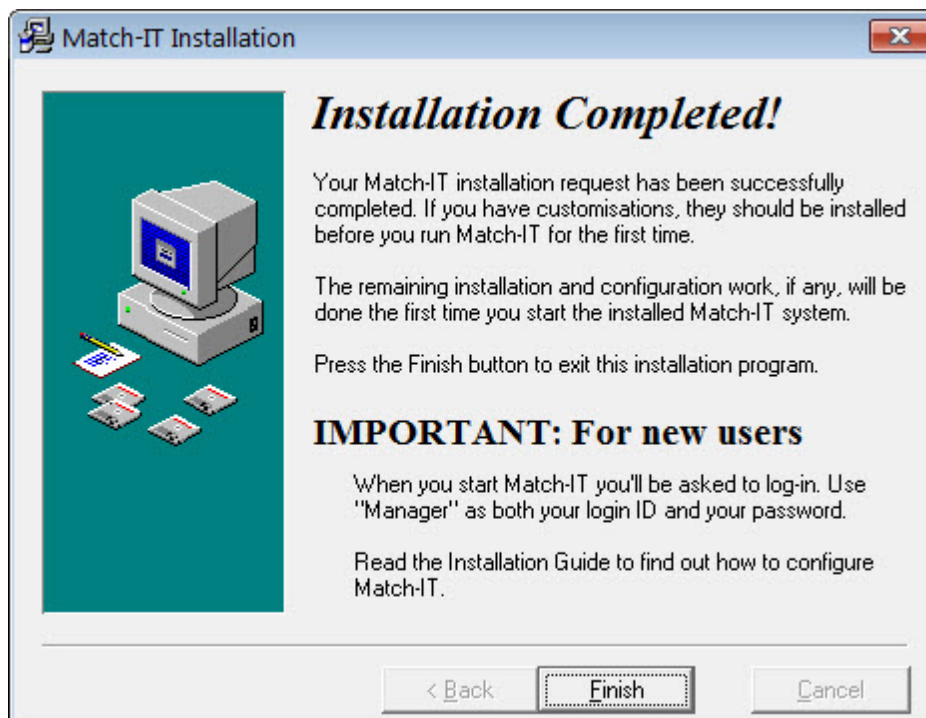
If you want the software installed to a different location to the one offered (usually C:\Match\_IT), press the Browse button to select the location you wish to use. If the folder you select does not exist, it will be created. Type a short name into the **New Installation DataSet Name** box, such as **LIVE** or **Eval**, to identify the installation. Then press **Next**. You will see a screen something like this:



Confirm the details shown are correct. If they are not, press **Back** to return to previous screens and change your selections. If they are correct, press **Next** to begin the installation.

The **Install AGENT scheduler?** option should only be checked if you are running the installation system from the same PC you are going to use to run the 'Agent', this is typically your server. In all other cases this option should be un-checked. It should also be un-checked if you are just loading the software for evaluation purposes. The *agent* is a special program that performs nightly Match-IT housekeeping functions.

The software will now be installed on your system. The process will take only a few minutes. When it has completed you will see a screen something like this:



Press **Finish** to exit the installation program.



## 4 Initialising the software

Initialisation is automatic the first time you run the software. You can run it by clicking on its icon on your *Windows* desktop, placed there by the installation program, or by double clicking on the `match_go.exe` program in the folder you installed the software into.

The following sub-sections describe the minimum you need to do to start using the software. More detailed setup guidance is given in the Setup Guide.

### 4.1 Starting Match-IT

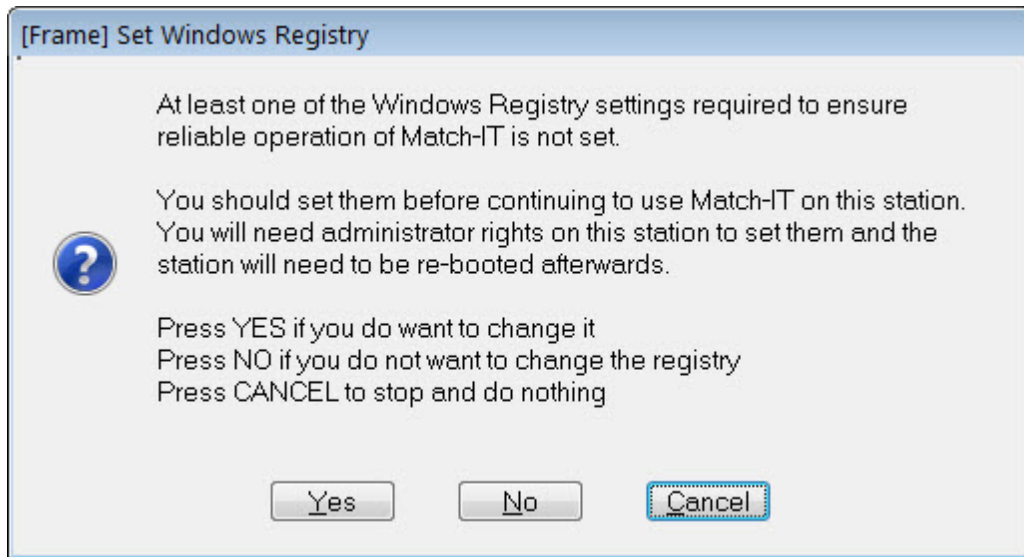
If you've installed the software correctly you will see a splash panel appear similar to the one below:



This is a small start-up program, not the full system. The first thing this start-up program does is verify the full system has not been infected by a virus. If it has it will refuse to load it. If no virus infection was detected the system will begin to load. Because the software checks itself for viruses it's recommended you turn off your virus checking software on the Match-IT installation folder. This will considerably improve the software start-up time.

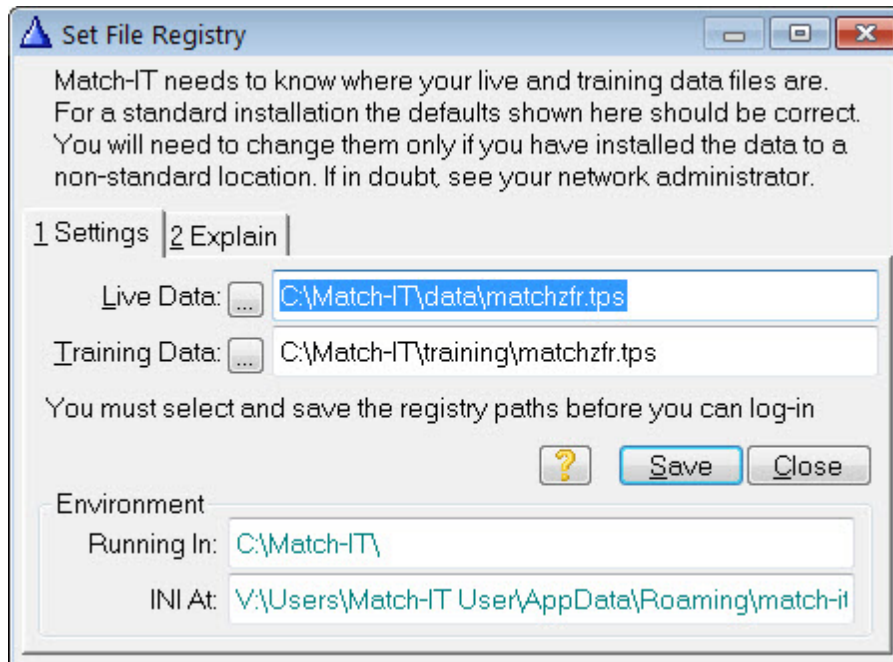
During loading the first time the software is run after an installation, you will be asked a few questions to prepare it for operation. Some of these will also be asked the first time you run the system on a new workstation.

Match-IT is very fussy about the network configuration it runs under. By default Microsoft configure their networks to maximise performance for client/server type database systems. In the peer-to-peer context that Match-IT uses this configuration is not safe and can lead to database corruption. If this client/server configuration is detected you will be asked if you want to change it, like this:

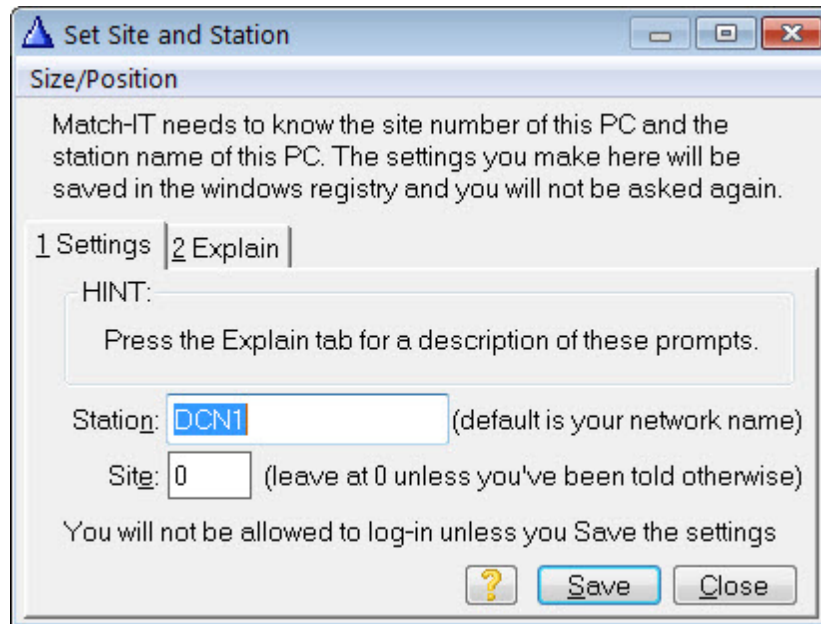


We **strongly** recommend you change your network settings. The change will not harm any client/server systems you use and the performance degradation is minimal (you will not notice). Press **Yes** to attempt the change. If it succeeds, you will receive a notification and the software will shut-down. You should then re-boot the PC to make the change permanent. The attempt will fail if you have not got administrator rights on the PC.

Once you get passed these initial checks, the first question is:



Verify the data locations offered are correct then press **Save** to continue. The next question asked is:

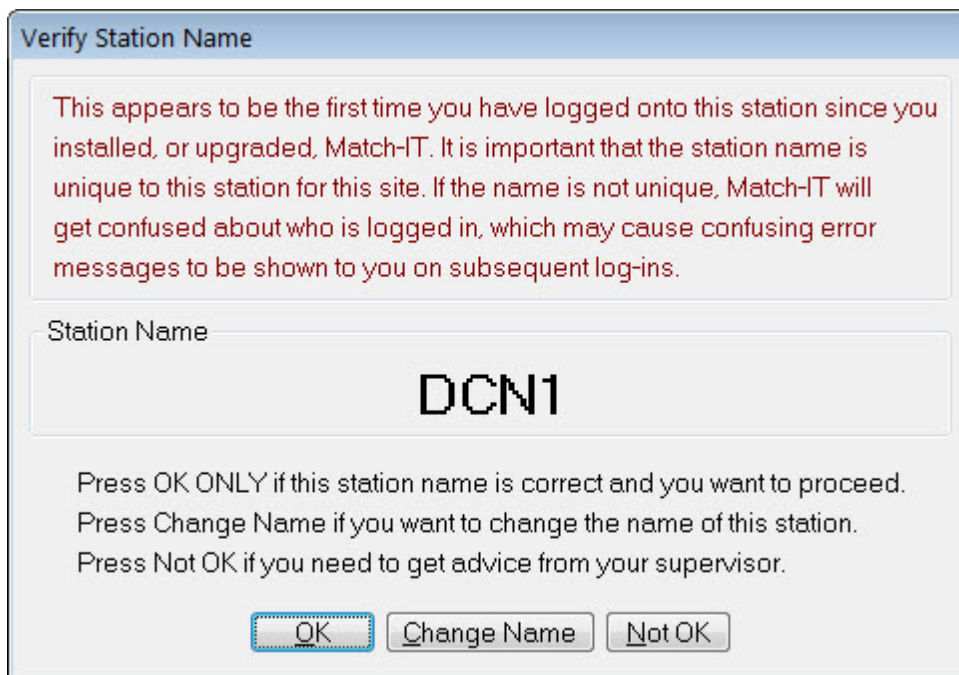


The station name offered will usually be the network name for your computer. The name you enter here is used to identify where activity takes place. You should choose a different name for each of your computers and the name must be thirty-two characters or less. The network name of the computer is a good choice.

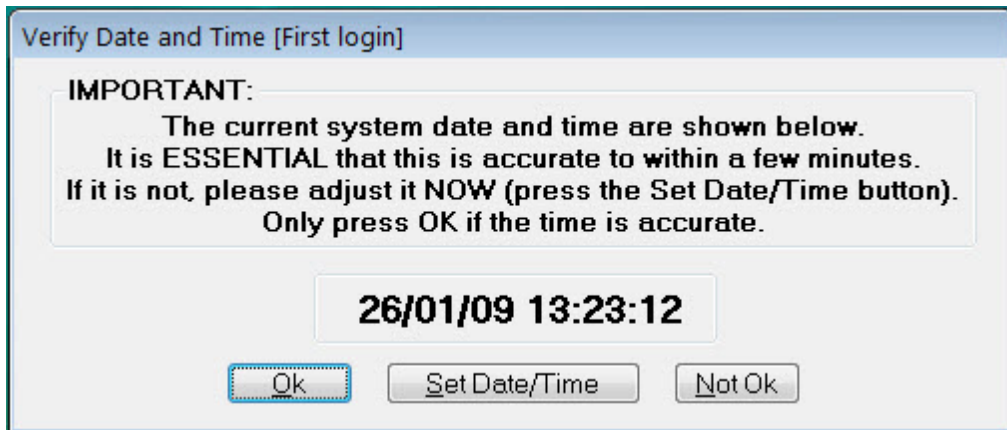
The site number should be left at 0 unless you've been given explicit instructions to change it. Press **Save** to continue the loading process. If you have not got administrator privileges this may fail. The software will now verify it can access the databases and that they are not damaged. How long this takes is a good indication of how well your network is performing. You will see a small screen similar to the one below with some letters changing on the end of the message line. These letters are the acronyms for the databases being checked. In a well configured network these will change faster than you can read them.

```
zf:File System - Pre-init (locating:OPC)
```

Once these checks are complete it will ask you to verify the station name with a screen like this:



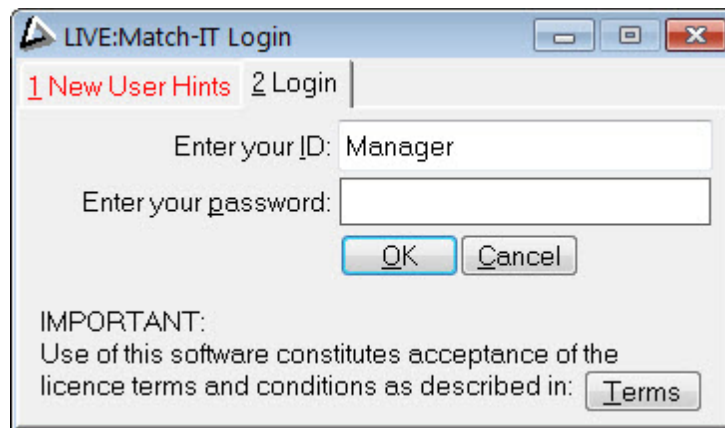
Press **OK** to continue. Next, you will be asked to verify the date and time on your computer are accurate.



DO NOT PROCEED UNLESS THE DATE/TIME SHOWN IS ACCURATE TO WITHIN A FEW MINUTES. An accurate date and time is essential to operate correctly and the software is extremely rigorous in its checking. If it detects an inconsistency in the date or time during operation IT WILL STOP until you resolve the problem.

Press **Ok** when you are satisfied the date and time are accurate. After some more internal checking, you will see the log-in screen.

## 4.2 Log-in



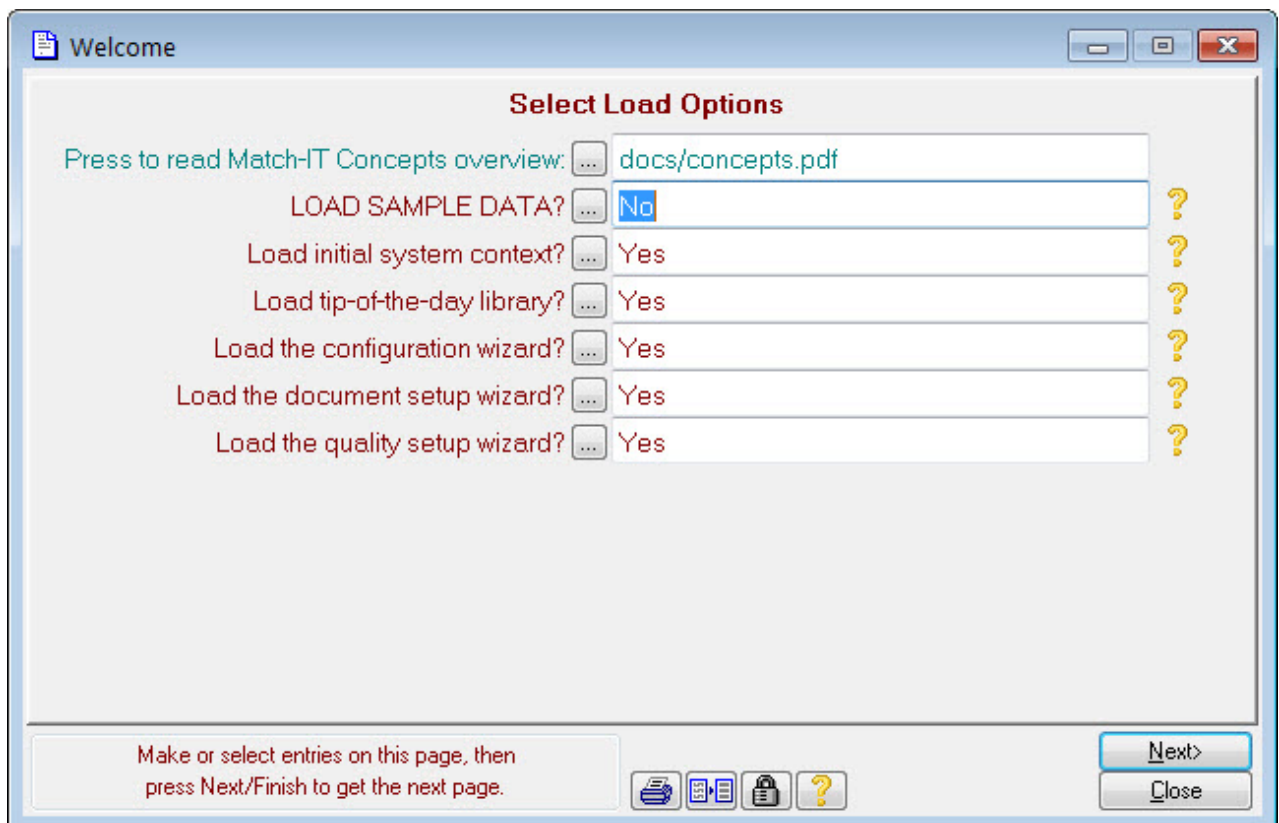
The first time you run the software, you should enter **your ID** as **Manager** and your **password** also as **Manager**. To prevent unauthorised access to your system, the password should be changed as soon as possible to something only known by you. The procedure to do this is given later. As a security measure, you will only be given 3 opportunities to enter your ID and password correctly. If you don't do it within 3 attempts, you will not be allowed into the system. As a further security measure, you must do it within 2 minutes. You will have to start again if you take longer. Press **OK** when you have entered your ID and password. After some further initialisation activity, you will be presented with an empty desktop and you will be invited to run the Welcome wizard. It will look something like this:




Press **Yes** to run the Welcome wizard.

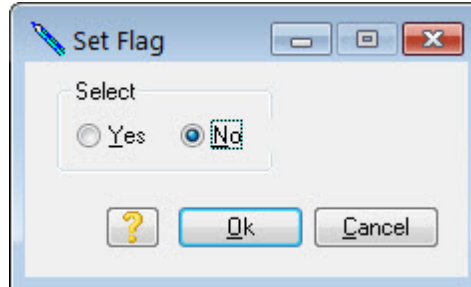
### 4.3 Select options

The first time you start a new installation, it is completely empty, it doesn't even have a menu. The first thing to do is to set-up an initial configuration. The Welcome wizard will guide you through this process. You will see a screen similar to this:

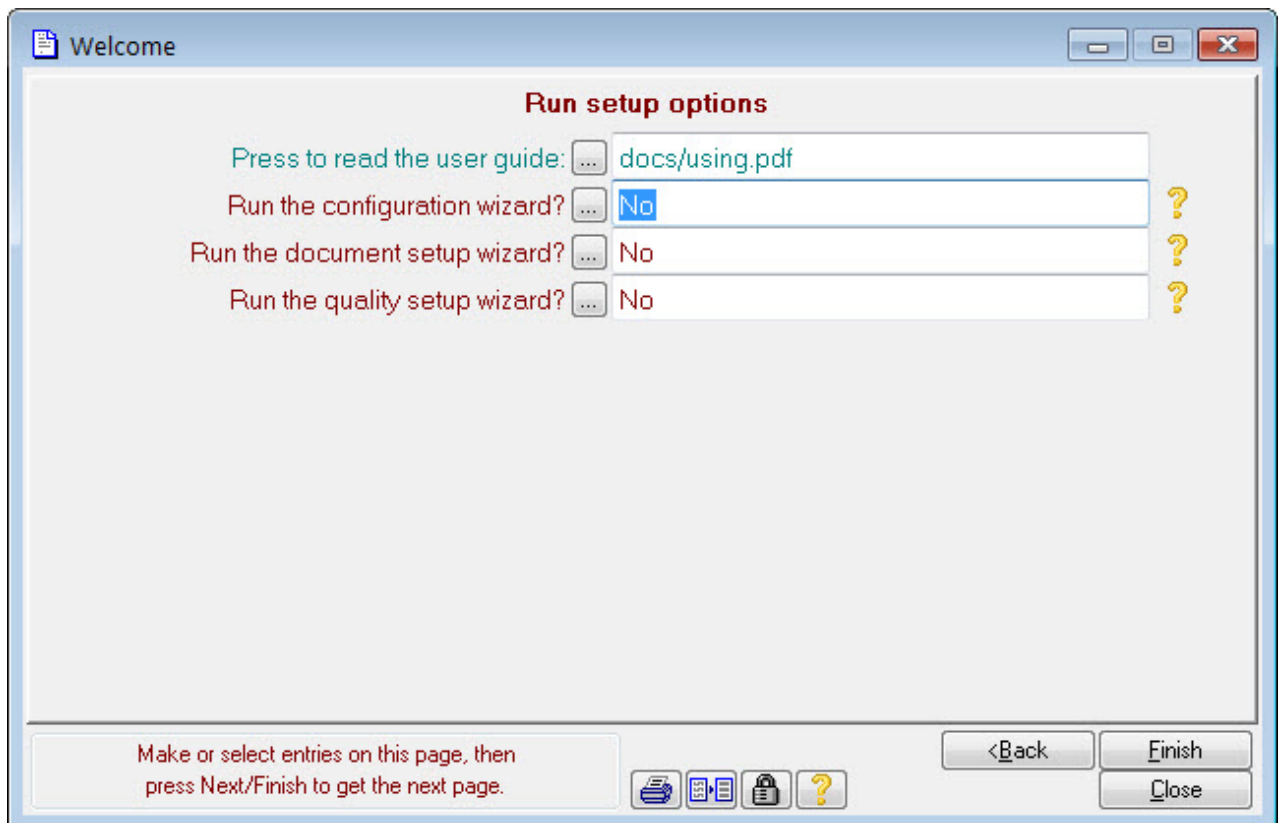


The conventions used for screen elements will be explained later. For the moment, we'll only explain what's necessary to initialise the software.

If you are installing the system to evaluate it, select **Yes** against the **LOAD SAMPLE DATA** prompt. If you are setting up ready for your live system, leave it at **No**. To change the option, press the small square button  by the **LOAD SAMPLE DATA** prompt and check **Yes** or **No** as required, then press **Ok**. (The small square buttons are referred to as ellipsis buttons.)



Leave the other selections as they are and press **Next** to continue. The next page will present more options:

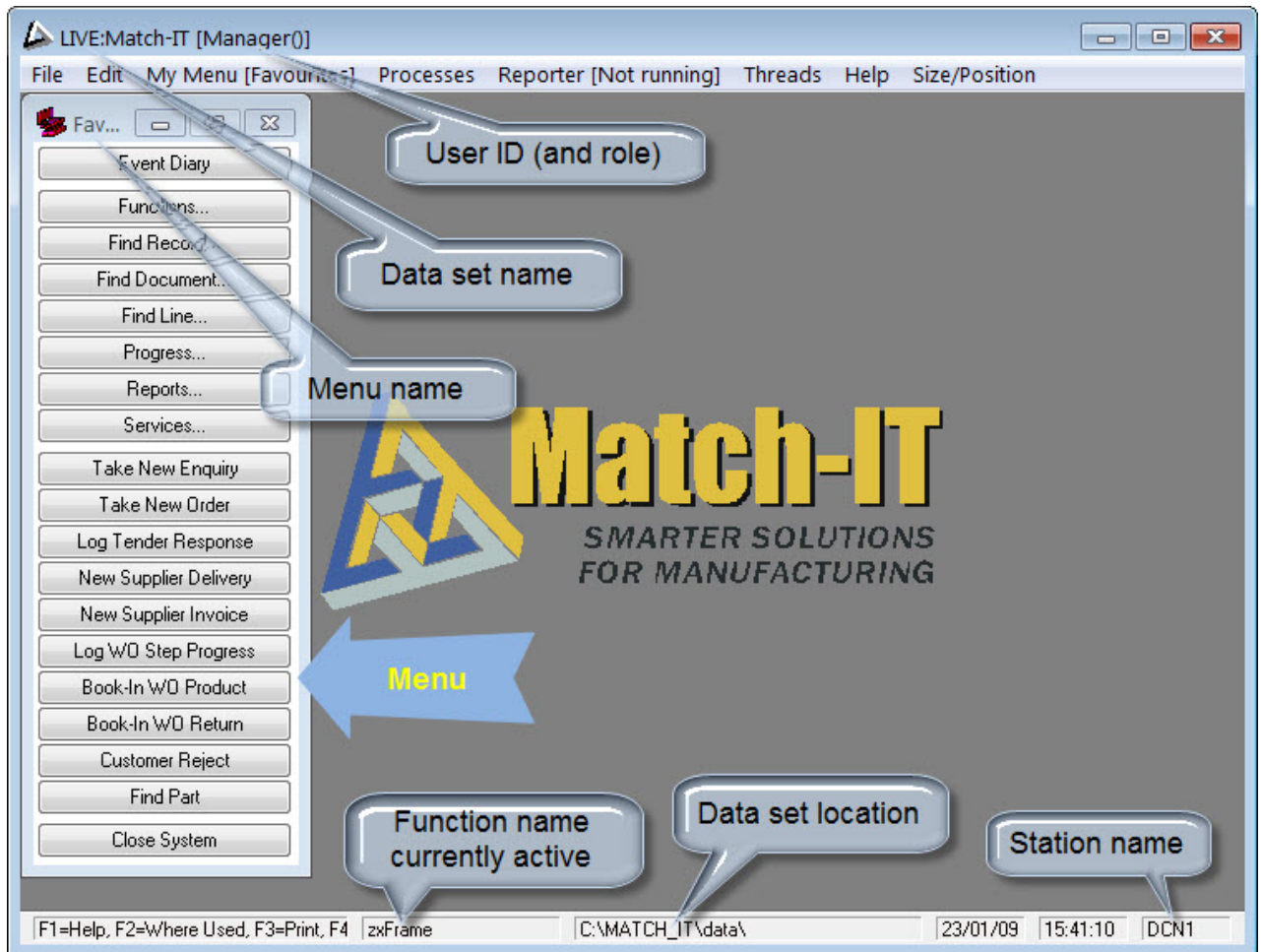


Leave these on their default and press **Finish** to continue. Press **Yes** on the following confirmation screen. Your selections will now be implemented.



### 4.4 Your initial desktop

After a few minutes of activity, you will be presented with the desktop. It will look something like this:

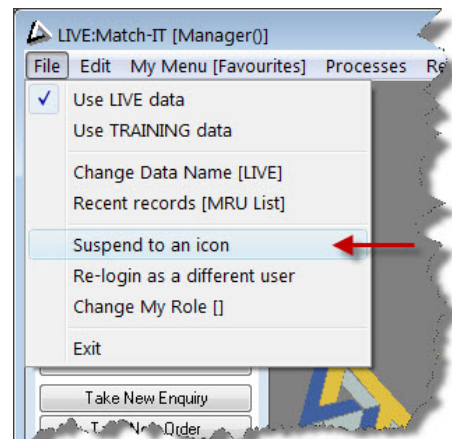


#### 4.4.1 Hiding The Desktop

If you leave the system idle for more than a few minutes, it will shrink itself down to an icon on your task bar. This is a security feature to prevent unauthorised access in the event you've been called away from your computer. It's referred to as hiding.

You can also tell it to hide immediately by pressing the **File** | **Suspend to an icon** item in the top menu bar.

To restore it after hiding, press on its icon on the task bar.



A re-login panel will appear like this:



Notice your user ID is already filled in. Re-enter your password and press **OK**. The desktop will be restored to the same as you left it. If instead of pressing **OK**, you press **Exit**, you will be logged-out and the system will shut-down. You can also re-log in as a different user by entering a new user ID and password. In this case, the current user will be logged-out and you will be logged-in in their place.

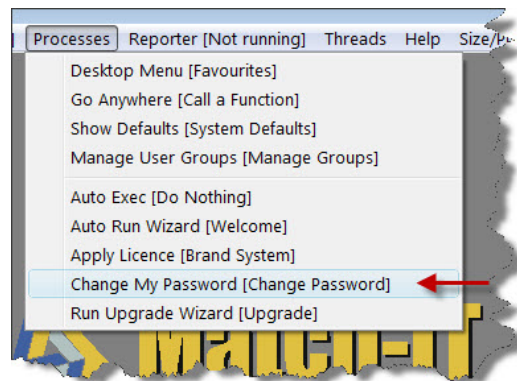
You can control the idle time limit before it hides with a personalised default. You will be shown how to change your defaults in a moment.

Note: If you leave it idle long enough, an hour or so, it will fully log you out and shut-down.

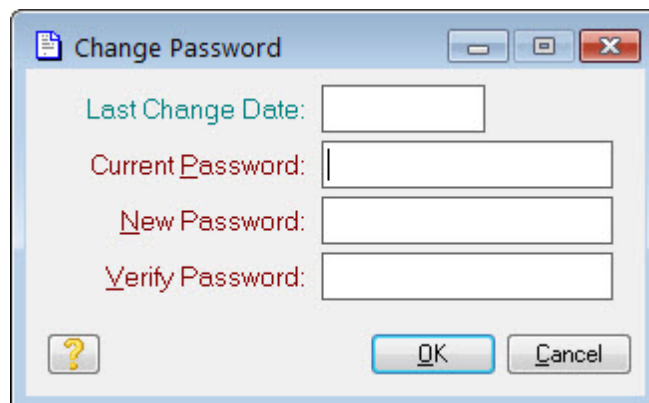
### 4.5 Change Your Password

The first time you log-in, you should change your password to something only known by you. Make sure you can remember it! If you forget it there is no back door; you will be locked out. To recover from forgetting your password will require assistance from your Match-IT supplier and there may be a fee chargeable.

To change your password, select **Processes** from the menu line just below the desktop title and then the **Change My Password** item.



A panel like the one below will appear:

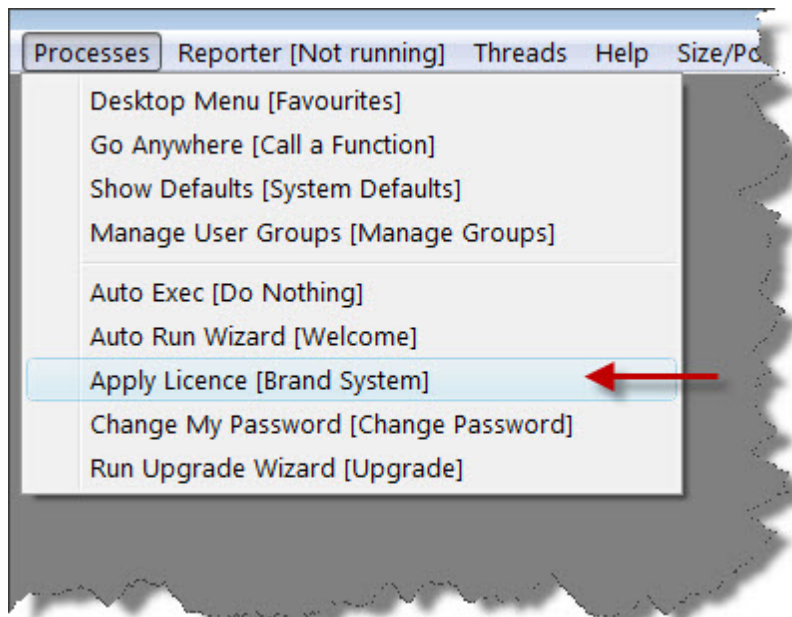




Type your initial password into **Current Password**, and the new one you want to use into **New Password** and again, as a confirmation, into **Verify Password**. The new password will become effective as soon as you press the **OK** button. If you typed your current password incorrectly or the new password and the verify password are not the same, the new password will not be accepted. You must correct the entries and try again. Notice that as you type, \*s are shown not the actual characters you type. This is a security feature to prevent onlookers from seeing what you are doing.

## 4.6 Apply your licence

If you've been given a software licence, now would be a good time to apply it. Skip to the next section if you have no licence to apply. The licence can only be applied when nobody else is using the system and all screens on the desktop are closed. This includes the menus. To apply the licence now, close all the menus and windows so that the desktop is empty. Select **Processes** from the menu line just below the desktop title and then the **Apply Licence** item.



Read the explanation that appears, and then select the **Set Licence** tab; you should then see a panel like the one below:

Brand System

1 Explain 2 Set Licence

Enter your licence number details:

Licensee:

Number:

This is your user entitlement:

Start Date:

Valid For:  (days)

Expires On:

Max Users:

This is your upgrade entitlement:

Start Date:

Valid For:  (days)

Expires On:

? Apply Cancel

Type the licensee name you've been given into the **Licensee** field, and your licence number into the **Number** field. The letters and numbers must be entered in the correct order, but their case and any formatting characters do not matter. If you enter it incorrectly, it will not be accepted. Once you've entered your details, press the **Apply** button. You will be shown the Match-IT licence agreement. You must read it all and show you've done so by double clicking on its last line. Once you've done that, the **Agree** button will light up. Press it if you agree and your licence will be applied. If you press **Do Not Agree**, the software will shut-down.

After a few minutes of activity, your licence application will be complete. The licence application process 'brands' your data and makes it unique to you. Once branded, your data cannot be read by any Match-IT system except yours.

**IMPORTANT:** It's your data that becomes 'branded' not your copy of the software.

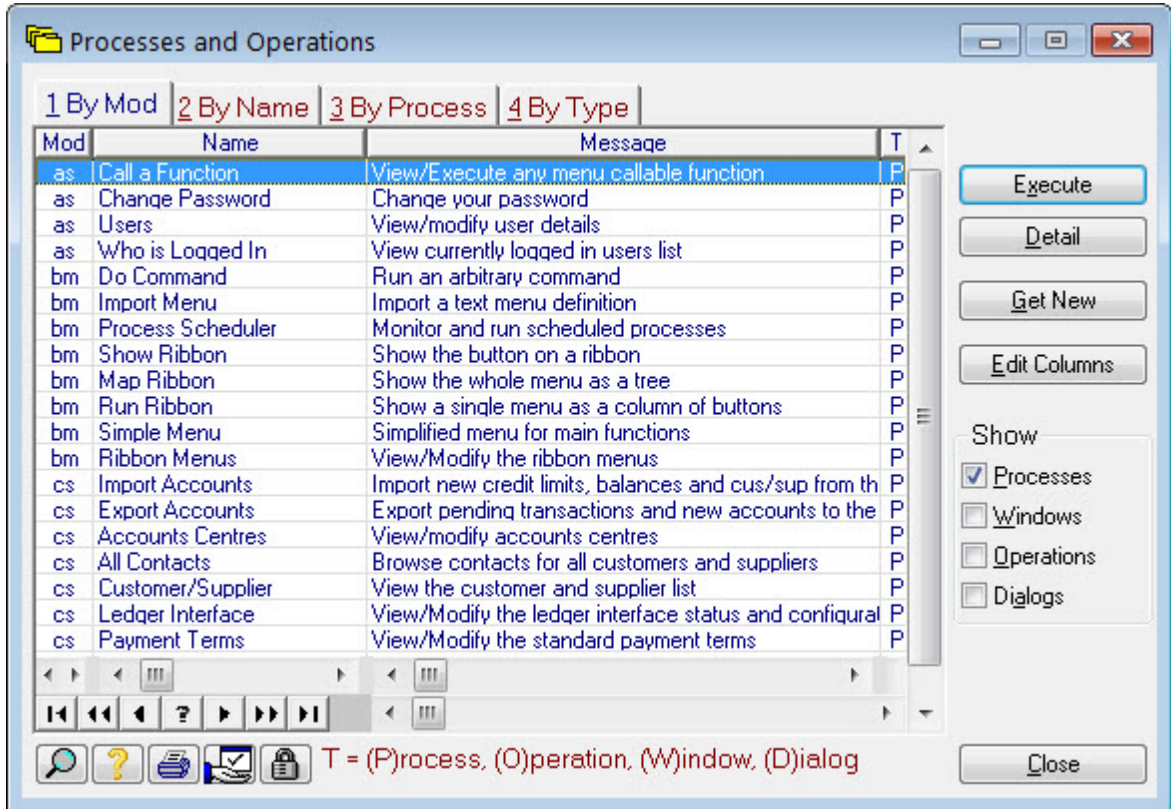
## 4.7 Add your initial users

You should allocate a user account and user ID to each user you intend to allow access to your system. The Manager account you've used so far should be reserved for the system administrator. Many operations done in the system are tagged with the user ID that did it, so it's useful to allocate a different ID to each user and instil a discipline of only logging-in using the correct user ID. Also, you can control what each user is allowed to do within the system by only allocating them the minimum privileges necessary to do their job.

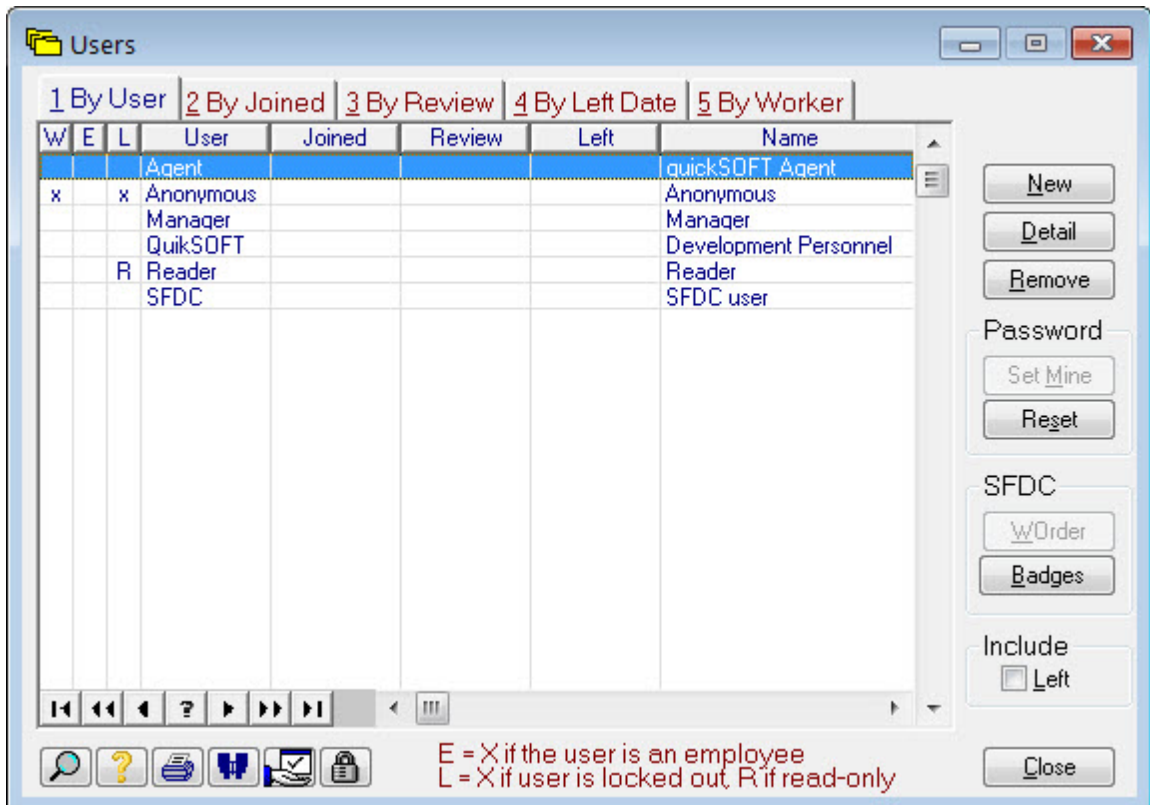
Note: You can have as many user accounts as you like. Your Match-IT licence just limits how many of these users can be logged into the system at once.

There follows a menu-independent method of accessing the appropriate part of the system to add a new user:

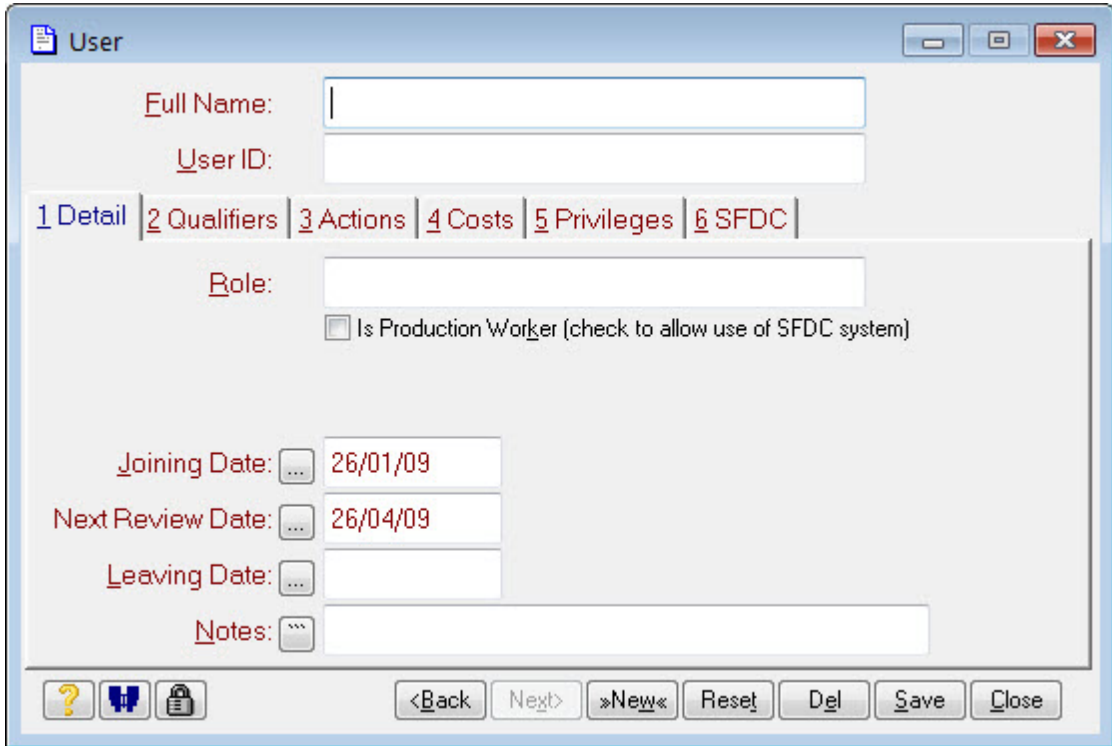
Select **Processes** from the menu line just below the desktop title and then the **Go Anywhere** item. A panel like the one below will appear:



This is a tabular list of every function in the system. It's a useful way to get around when you know what you want, but are not familiar with the menu system in use. Select the line that contains **Users** in the name column and press the **Execute** button. A panel like the one below will appear:

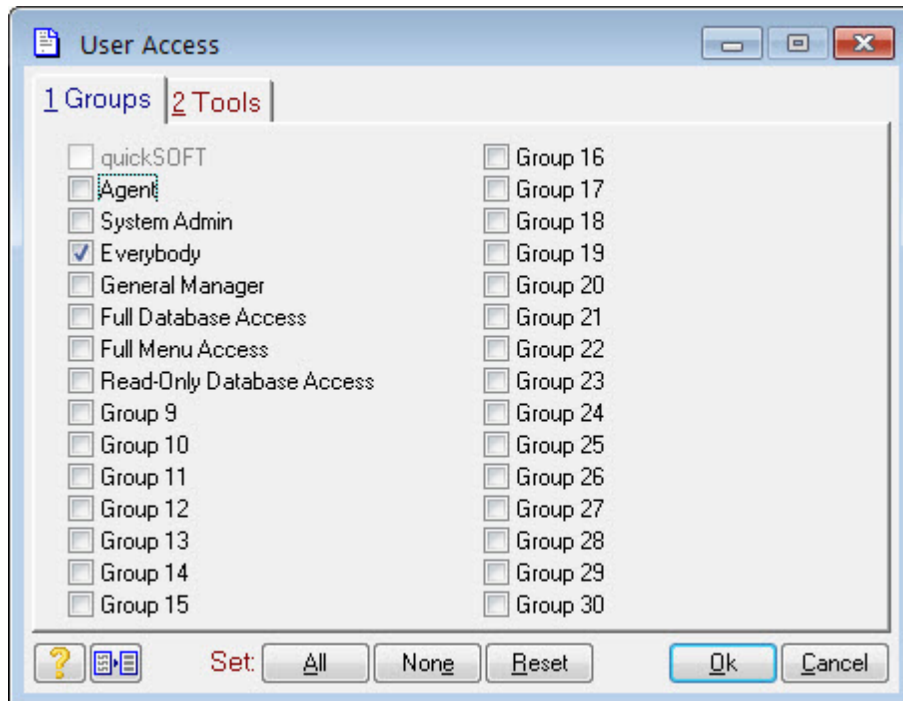


This is a list of all the user accounts. Notice the Manager account that you've been using so far. To add a new user, press the **New** button. A form will appear like the one below:



Fill in at least the **Full Name** and **User ID** fields, other fields are optional. The **User ID** must be entered during log-in to gain access to the system. **The first time a new user logs in; their password will be the same as their user ID.**

You must assign privileges to the user to allow them to do things that are appropriate to their role. Do this by pressing the **Groups** button in the **Privileges** tab (#5). A set of options will be shown as below:



The security system is based around the notion of user groups. The panel of options shows the names of all the groups (your system may have different names to the ones shown). Each one ticked allows the associated user access to the functions implied by the name. The **Everybody** group should always be ticked, this provides the minimum privileges necessary to allow them to log-in. The privileges associated with

each group can be changed; the Welcome wizard you ran earlier defined their initial settings. The topic is discussed in more detail in the Setting up your security scheme section. Tick whichever options you think apply and press **Ok**. You can change them later if you find the user hasn't got the privileges they need.

Press **Save** on the user form. The new user account is now set-up and ready for use. Repeat the process as necessary to define all the accounts you need.

## 4.8 Setup your documents

Match-IT is supplied with a set of generic business documents that can be quickly tailored by you to reflect your company identity. There is also an integrated document editor that allows you to completely redesign all documents as you wish. However, the standard documents are useful for getting started. A wizard to guide you through the process of tailoring the standard documents was loaded by the Welcome wizard you ran earlier. Run that now by pressing **Functions | Setup | Setup Documents... | Document Preferences** (the Name1 | Name2 notation means press Name1 then press Name2, etc.). A screen will be shown to you that describes the document set-up wizard. Press **Yes** to confirm you want to run it now. The first page of questions will be shown to you. It will look similar to this:

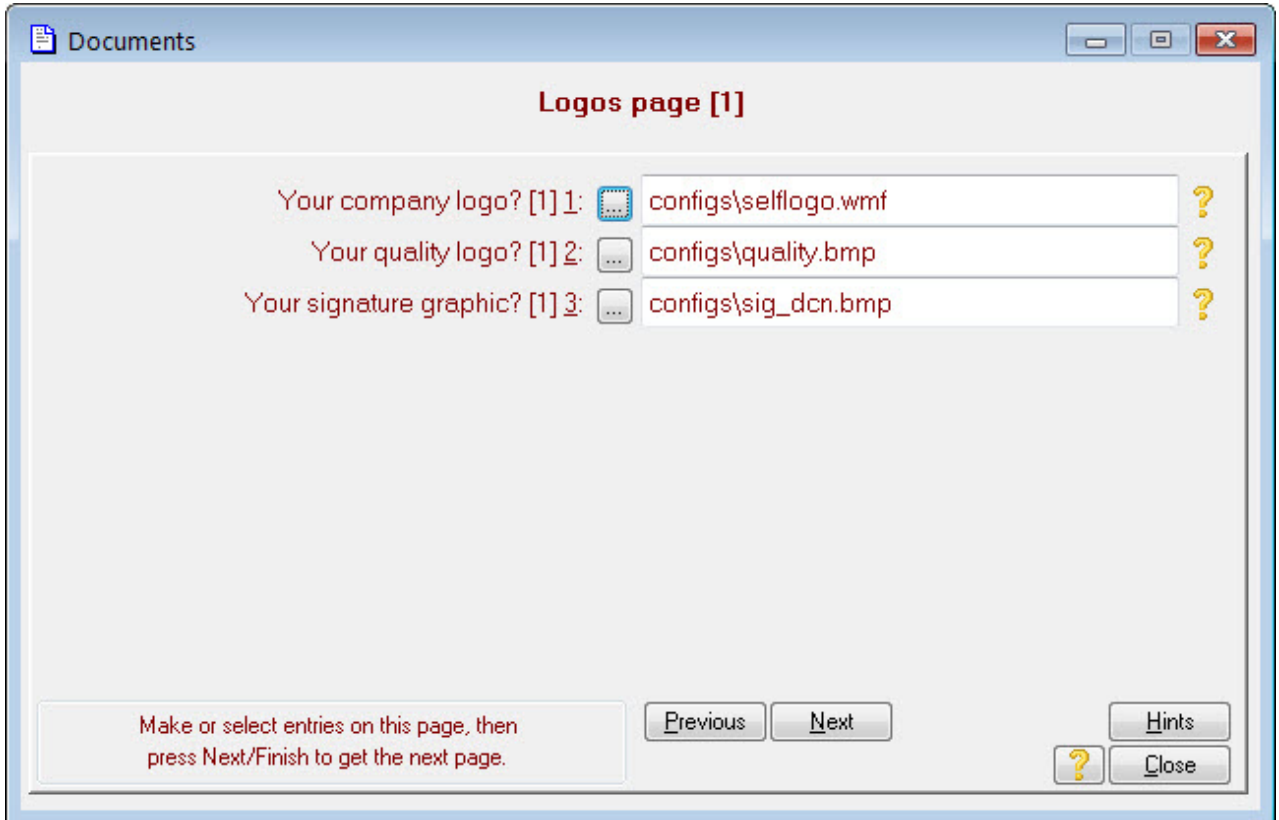
The screenshot shows a window titled "Documents" with a subtitle "Self page [1]". It contains a list of prompts for company information, each with a text input field and a yellow question mark icon. The prompts are:

- Your company name? [1] 1: [Your Company Name]
- Your address for correspondence? [1] 2: [Your Company Address (8 lines)]
- Your telephone number? [1] 3: [Your Company Telephone]
- Your FAX number? [1] 4: [Your Company FAX]
- Your nominated signatory? [1] 5: [Your Company Signatory]
- Your VAT registration number? [1] 6: [Your Company VAT#]
- Your company registered address? [1] 7: [Your Company Registered Office]
- Your company registered number? [1] 8: [Your Company Registration#]

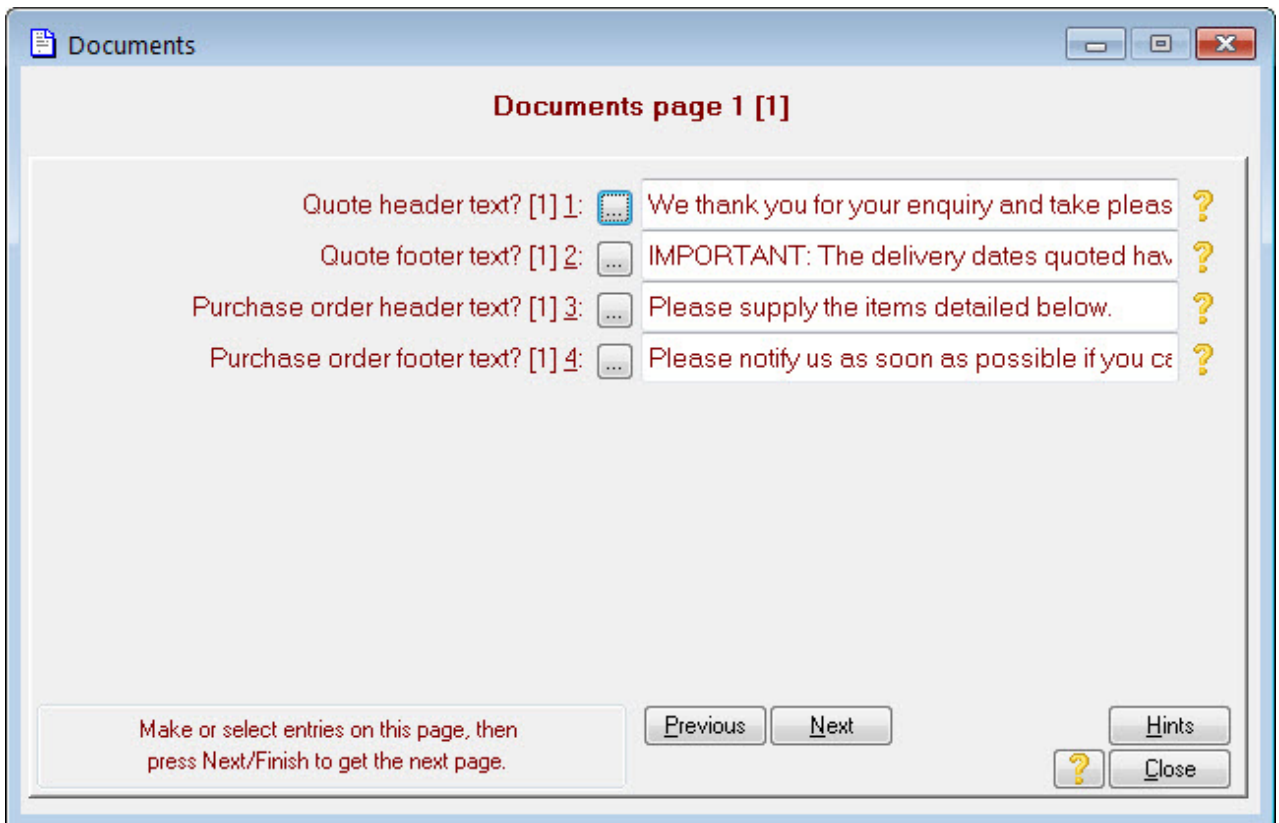
At the bottom, there are buttons for "Previous", "Next", "Hints", and "Close". A text box at the bottom left says: "Make or select entries on this page, then press Next/Finish to get the next page."

The prompts provide standard information to be printed on your documents. Press the icons to get an explanation of each field. Change the details to suit you. If you set a field to blank, the standard documents will skip the field. An example document showing where all these fields go will be given in a moment. Press **Next** when you are ready to go to the next set of prompts. The next page of prompts allows you to set a pair of logos for your paperwork. The page will look similar to this:





The logos can be in a wide variety of graphics formats, including scanned images (i.e. tiff files). If you haven't got a suitable graphic to hand, set the fields blank for now. Press **Next** when you are ready to go to the next set of prompts. The next page of prompts allows you to set standard text to print on your documents. The page will look similar to this:



The header and footer text prompts allow you to set a standard message on each of the respective documents. Press the ellipsis buttons to see and edit the text of the full message. Press **Next** when you have made the changes you wish. After a slight pause you will be presented with a similar page for other document types. Make your changes as required then press **Next** to go to the next page. The next page allows you to set the initial serial numbers to allocate to your documents. The page will look similar to this:

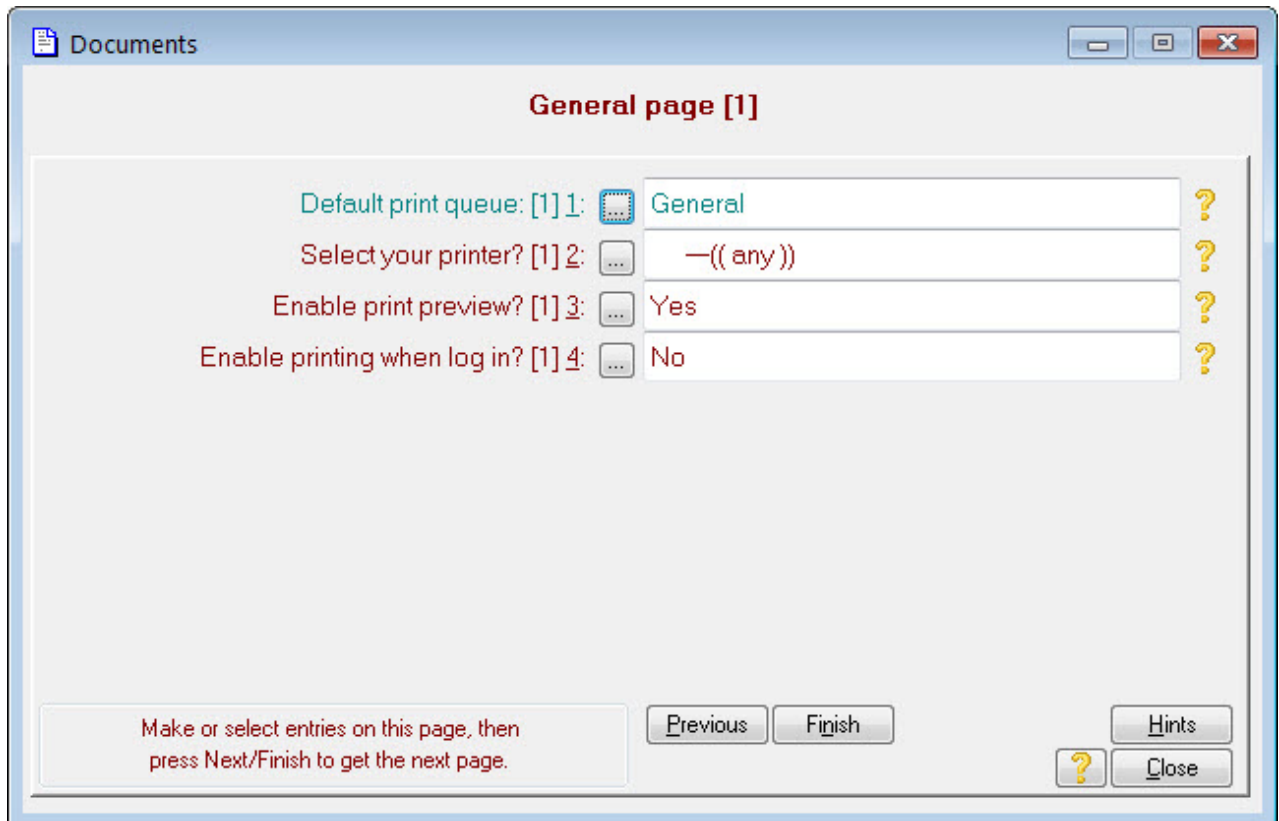
**Serial numbers page [1]**

Next enquiry number? [1] 1:	...	1	?
Next sales order number? [1] 2:	...	1	?
Next sales dispatch number? [1] 3:	...	1	?
Next C of C number? [1] 4:	...	1	?
Next sales invoice number? [1] 5:	...	1	?
Next purchase order number? [1] 6:	...	1	?
Next batch number? [1] 7:	...	1	?
Next NCR number? [1] 8:	...	1	?
Next works order number? [1] 9:	...	1	?

Make or select entries on this page, then press Next/Finish to get the next page.

Previous Next Hints Close

The system allocates a unique serial number to each document it creates. Each new document is given the next number in sequence. You can set the start position of the sequences by changing the numbers on this page. The system will use whatever number you set as the next one in sequence and will carry on from there. If you are currently operating a document-numbering scheme you can set the system to carry on in the same sequence by adjusting this page. Press **Next** when you have set your numbers. The final page in the wizard will be shown, similar to this one:

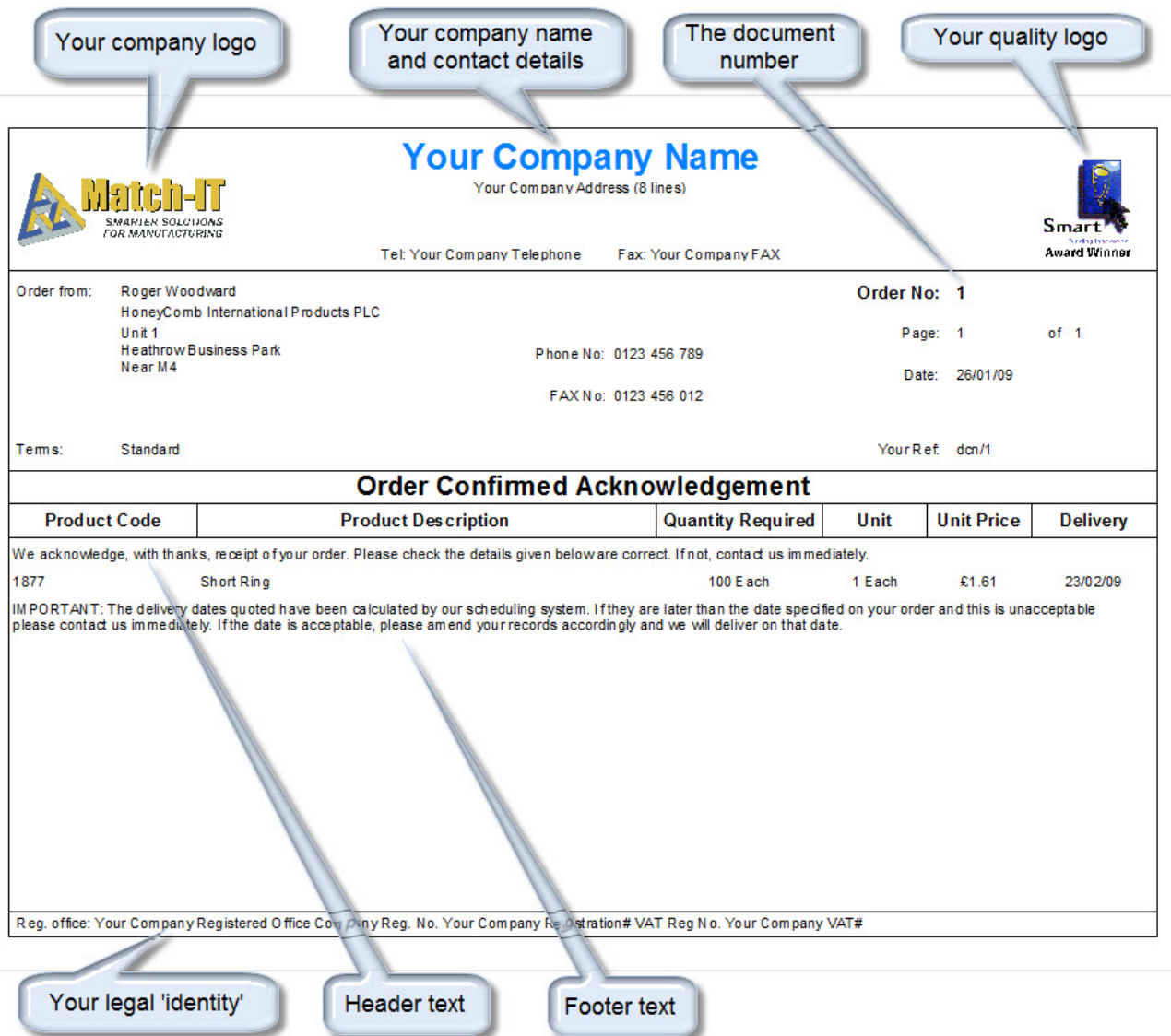


This page allows you to set the most usual printer to be used for your documents. The blue **Default print queue:** prompt is just showing you which queue is being set. You will learn more about print queues later. Pressing the ellipsis on the **Select your printer?** prompt will bring up the standard *Windows*™ printer selection dialog. If you leave this field blank, the system will use whatever your *Windows* default printer is set to whenever it wants to print a document.



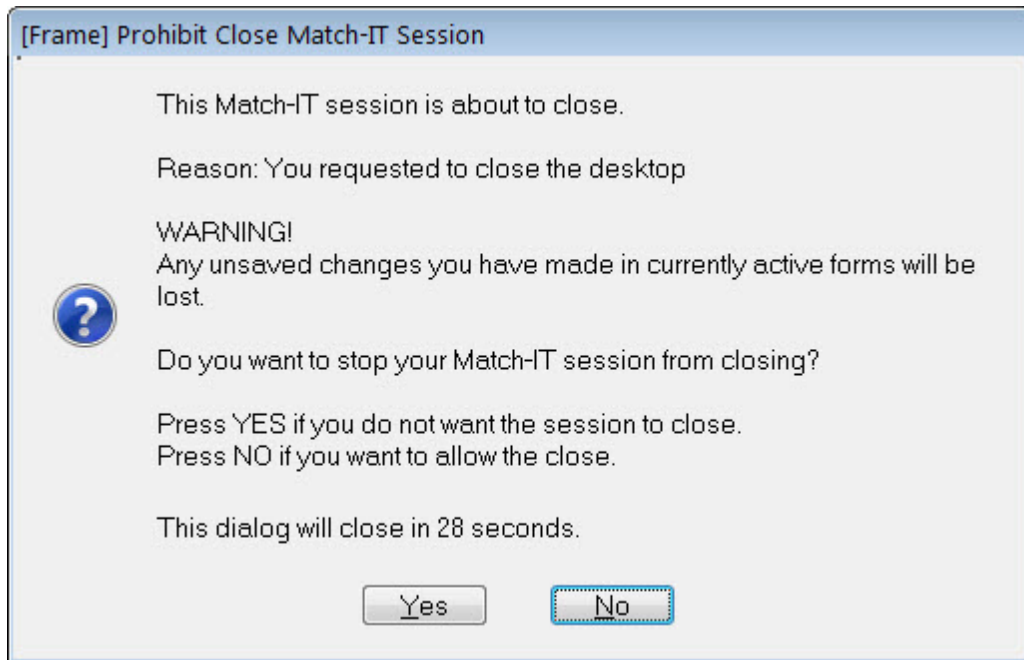
### 4.8.1 Typical standard document structure

The following diagram shows where all the information you've entered appears on one of the standard documents. Many of the standard documents follow the same form.



### 4.9 Logging-Out

To log-out, just close the program like any other *Windows*™ program. The simplest way is just to press **Alt-F4**. This is the standard Windows close keyboard short-cut, or you can press the **X** in the top right corner of the desktop, or select the **Exit** item from the **File** menu. In all cases, you will be asked to confirm the close:



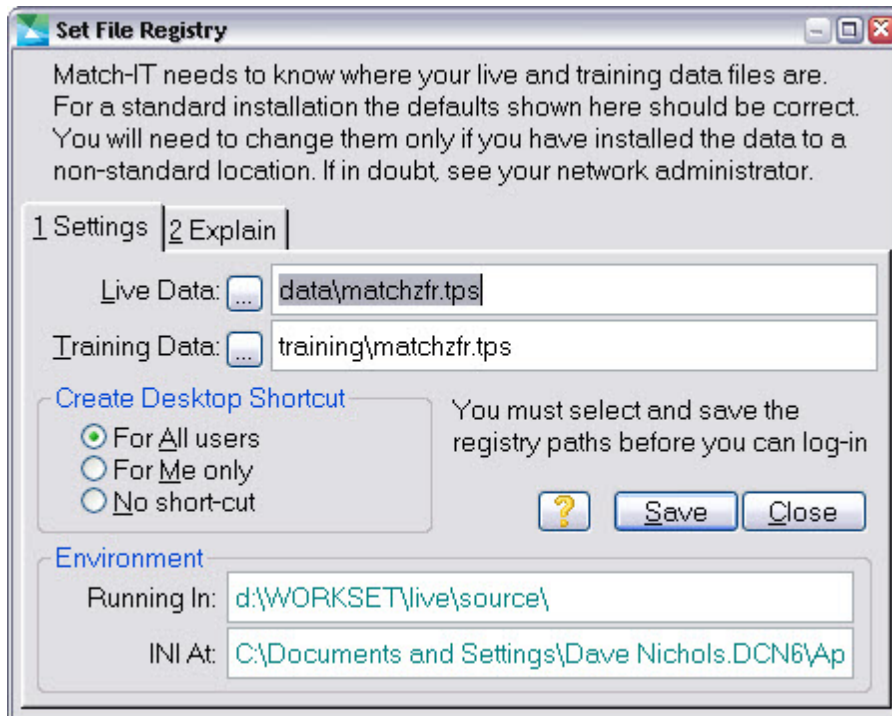
Press **No** to allow the close to proceed.

There are some system actions that will force you to be logged-out. In such cases, you will see this confirm dialog pop-up and the **Reason** line will describe why you are being logged off. A typical reason would be if the system were being upgraded to a newer version from some other workstation.

Any screens and menus you have open on your desktop when you log-out will be re-opened in the same place and at the same size the next time you log-in on the same station.

## 5 Using from a workstation

To use Match-IT from another workstation it is only necessary to run it on that workstation. It will detect that it has not run on that station before and you will be asked for a few key pieces of information. To run it, just browse to the `match_go.exe` program in the `sys` folder of the Match-IT installation on your server (typically `\server\match_it\sys`). You will be presented with a dialog similar to the one below:



If you have a typical installation all you need to do is press **Save**, then log-in. Job done!

## 6 Moving the software

There are several things to do if you want to move your Match-IT installation from one location to another:

1. Stop the agent scheduling service on the old system (see Un-Installing).
2. Stop the agent session on the old server.
3. Bulk copy your ...\`match_it`\ folder from its present location to its new one.
4. Start the agent scheduling service on the new system (see Setting up the Agent).
5. Change your folder shares and drive mappings.
6. Make a short-cut to Match-IT on the desktop of your new server.
7. Fix-up any absolute paths in the global `match_it.set` file and the `agent.set` file (both in the ...\`match_it\data` folder).
8. Fix-up any absolute paths in defaults (e.g. agent start as, backup paths, logo paths, etc).
9. Test everything works as expected.
10. Delete the original ...\`match_it`\ folder.

If your workstations access Match-IT through a drive mapped to a shared folder, all you have to do on each workstation is re-map the same drive to the new share. If the share name has not changed, you do not even have to do that.

If you are changing the mapped drive or the share in a way that changes the path to your Match-IT installation from the perspective of the workstation (or the agent) you may need to fix-up the start-up icon on the desktop and registry path in the local INI file for that station/user. Right-click on the icon to change its properties. To change the registry path in the local INI, click on the splash panel that comes up when you start Match-IT, then click on `Advanced switches` and then `ini=`. At the bottom of the panel that comes up will be a button to edit the INI file.

Lines to look for in the local INI files are of the form:

```
data=M:\match_it\data\matchzfr
training=M:\match_it\training\matchzfr
Registry=M:\match_it\data\matchzfr
```

Edit these to suit.

## 7 Un-Installing

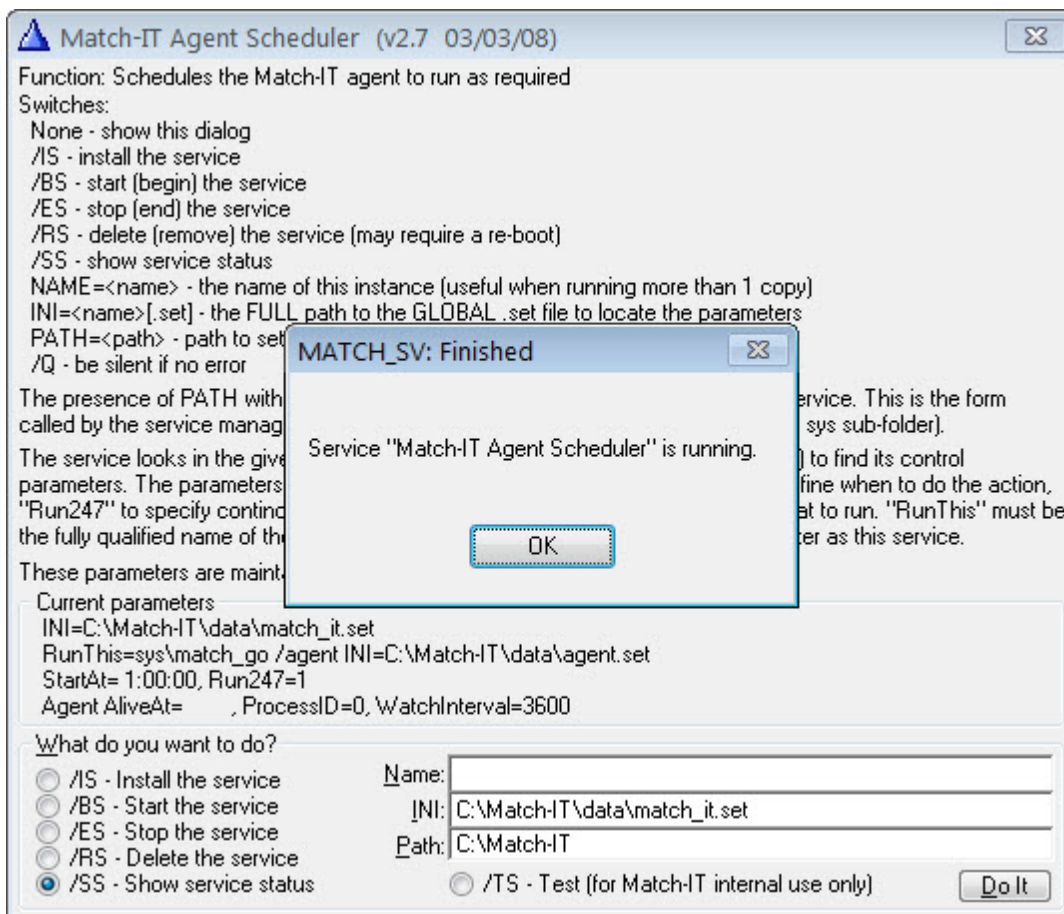
You will need to be logged into *Windows* as an administrator to un-install the software.

### Automatic Removal

To un-install the software automatically use the normal **Add or Remove Programs** (Windows XP) or **Programs and Features** (Vista) facility in the control panel. Look for the entry named Match-IT and remove/uninstall it. This will leave intact the data you created/changed when running the software. If you want to remove that too, browse to the folder where you installed the software and delete the whole folder.

### Manual Removal

To remove the software manually, first you must stop and remove the agent scheduling service. Do this by double-clicking on the `match_sv.exe` program in your Match-IT `sys` folder. A screen like the one below will be shown:



Press **OK** if necessary to acknowledge that the service is running. Select the **Stop the service** option and press **Do It**. After a brief pause you will receive a notification that the service has stopped. Press **OK** on that. Next, select the **Delete the service** option and press **Do It** again. After another brief pause you will receive a notification that the service has been removed. Close the `match_sv.exe` program.

Now make sure all Match-IT sessions are stopped, including the agent session running on your server.

Finally, browse to the folder where you installed the software and delete the whole folder.