



Profiles Professional Installation and Data Migration Guide

Professional v9.3

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Profiles Professional Installation

This guide outlines the steps required to install Profiles Professional v9.3.

System Requirements

In order to run Profiles Professional, your personal computer must meet the following hardware and software specifications:

Minimum system requirements	
Operating System	Microsoft Windows XP (Service Pack 3), Vista, or Windows 7
Microsoft .NET Framework	v3.5
Processor	1.2 GHz 2.0 GHz recommended
Free Hard Drive Space	512 MB
Memory	1 GB RAM 2 GB RAM recommended
Web Browser	Microsoft Internet Explorer 6.0 or higher
Adobe Reader	Adobe Reader 6.0 or higher

Profiles Professional does not support Windows 95, 98, NT4 or Me.

Note: EISI will conduct limited software testing to assess general compatibility with its applications and Microsoft Windows 2000 and Adobe 5.0; however, in the event that an issue arises that is specifically related to running Profiles with programs that do not meet the minimum system requirements, EISI is not obligated to provide technical support.

Since January 2004, Profiles has followed the Microsoft Life-Cycle Support Policy for supported operating systems. New versions of Profiles software are tested and certified on operating systems that fall within Microsoft's Mainstream Support time line.

For more detailed information and a list of FAQs on Microsoft's Product Life-Cycle Support Policies, please visit <http://www.microsoft.com/windows/lifecycle/default.aspx>.

Important Note for Existing Customers

With this version, a change has occurred in the way the application stores case data. If you are an existing customer you will need to transfer your data in order to view your existing cases in the new version of the application.

Your existing cases need to be transferred from the old data system to the new one. Profiles will attempt to recognize those cases that belong under a single client and place them there. For cases that are not clear, you will be able to indicate the appropriate client.

Until the cases are transferred, you will not have access to them. However, you will be able to create new clients and cases.

To ensure a smooth data transfer experience, please read the *Data Transfer* section of this guide.

Installing the Application on a Desktop Computer

Before installing:

Close all open programs (especially virus protection programs like McAfee VirusScan and Norton AntiVirus)

This guide provides the following two types of installation instructions for a desktop computer:

- New customer installation
- Existing customer installation

New Customer Installation

As a new customer, you will need to follow a two-step process to install Profiles Professional:

- Step 1: Installing Profiles Professional
- Step 2: Authorizing Profiles Professional

Step 1 – Installing Profiles Professional

To begin a new customer installation process, follow these steps:

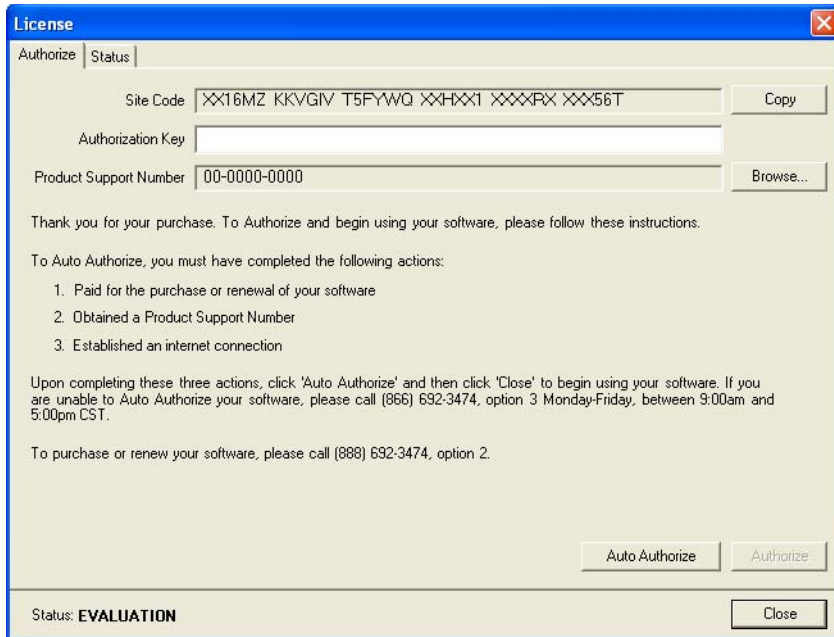
1. Access the Profiles Professional support site at http://support.eisi.com/support_us/profiles_professional/v9.3/product_updates/upgrade.htm.
Note: If you have received a disk, insert the disk into the appropriate drive. The application will automatically launch the *InstallShield Wizard* screen. Skip ahead to step 6 below.
2. Under *How to install*, click the **Download** link. A message screen appears.
3. From the *File Download - Security Warning* message screen, click **Save**.
4. Browse to the location on your computer where you downloaded the file, and then double-click the file.
5. A Security Warning appears saying *The Publisher Could Not Be Verified*. Click **Run**. The necessary files to begin your installation will be extracted to a temporary folder and the Installation Wizard will start up. If extraction does not begin immediately click **Setup**.
6. On the following screens, make these selections:

Screen Name	Command
InstallShield Wizard – Welcome Screen	Click Next .
License Agreement	If you agree to the terms of the agreement, select I accept the terms of the license agreement , and then click Next .
Choose Destination Location Note: The default location is C:\FPW. You may change the destination prior to clicking <i>Next</i> . However, this is not recommended.	Click Next .
Start Copying Files Note: This screen provides a summary of the <i>Current Settings</i> .	Click Install .
Setup Status	No action is required as various operations will be performed automatically.
Update Complete	Click Finish to complete the installation process. Your computer may need to be restarted. Save all your work, close all open programs, and then click OK to reboot your computer.

Step 2 – Authorizing Profiles Professional

Profiles Professional must be authorized for continued use. An authorization key and product support number (PSN) are required to license the software. To authorize Profiles Professional while the application is open, follow these steps:

1. Go to the **Help** menu, and then select **Authorize**. If you are prompted with a license warning, click **Yes**. The *License* dialog box opens.



2. If the *Product Support Number* appears on the *License* dialog box and you are connected to the Internet, click **Auto Authorize**, wait until the status displays *Authorized*, and then click **Close**. No further steps apply.
3. If you have already received a product support number from EISI but it does not appear in the dialog box, click **Browse** to find the *PSN.xml* file on your computer, and then click **Open**. The *Product Support Number* field populates automatically. Click **Auto Authorize**, and then click **Close**.
4. If you don't have a product support number, you can contact the *EISI Customer Service Department* by telephone at 866-620-7510, select Option 1, and then give the representative the site code (shown at the top of the *License* dialog box).
EISI will provide you with an authorization key. Enter the **Authorization Key**, and then click **Authorize** to authorize the software. Click **Close**.

Existing Customer Installation

As an existing customer, you will need to follow a two-step process in order to install Profiles Professional:

- Step 1: Installing Profiles Professional
- Step 2: Transferring your data

Step 1 – Installing Profiles Professional

Warning: If you are an existing customer installing the application on a new computer, perform the following steps.

Prior to installing the new application:

- Copy your existing FPW folder and its entire contents from your old computer into the same location on your new computer.
- You can then perform an upgrade installation on the new computer.

If you have already installed the new version of Profiles Professional on your new computer:

- Uninstall the new version from your new computer
- Copy your existing FPW folder and its entire contents from your old computer into the same location on your new computer.
- You can then perform an upgrade installation on the new computer.

1. After you have downloaded the application or have inserted the installation disk into the appropriate drive, the application will automatically launch the *InstallShield Wizard* screen.
2. On the following screens, make these selections:

Screen Name	Command
InstallShield Wizard	Click Next .
License Agreement	If you agree to the terms of the agreement, select I accept the terms of the license agreement , and then click Next .
Choose Destination Location Note: The default location is C:\FPW. You may change the destination prior to clicking <i>Next</i> . However, this is not recommended.	Click Next .

Screen Name	Command
Program Folder (the default folder is C:\FPW)	Click Next .
Start Copying Files Note: This screen provides a summary of the <i>Current Settings</i> .	Click Install .
Setup Status	No action is required as various operations will be performed automatically.
Update Complete	Click Finish to complete the installation process. Your computer may need to be restarted. Save all your work, close all open programs, and then click OK to reboot your computer.

Step 2 – Data Transfer

With this release, your application will no longer save your cases into an Access Database. Instead, your cases will be encrypted and saved in your *FPW Storage* folder.

For example: C:\FPW\Storage\joe.smith\Professional

Your data is safe!

Your Access Database will still reside in your *C:\FPW\Data* folder, but it will no longer be used to store data; copies of the .fpx files transferred from your Access Database will also reside in your *C:\FPW\Data* folder; however, these are archived copies of the .fpx files. The working copies of your cases reside within the *FPW Storage* folder.

If you choose not to transfer your data from the Access Database, you will still be able to use Profiles Professional. However, you will not be able to see the cases from your previous version until you perform a data transfer.

If you create households, clients, and cases prior to data transfer, those cases will still be available after you choose to transfer your data from the previous version of Profiles Professional.

Please contact *EISI Technical Support* at: 866-620-7510 and select *Option 3* if the following applies to you:

1. If at the end of the data transfer process you do not see all the cases you expected.
2. Prior to installation if you use an Access Database accessible by one or more planners either on the same computer or stored on a network drive, and you intend to continue sharing a common data storage location.
3. Prior to installation if your business runs a “service bureau” model in which an assistant uses the application to create or modify plans for one or more planners in your office and the Access Database is either on the assistant’s local computer or on a network drive.

Data Transfer

This portion of the installation instructions will lead you through the most common data transfer scenarios:

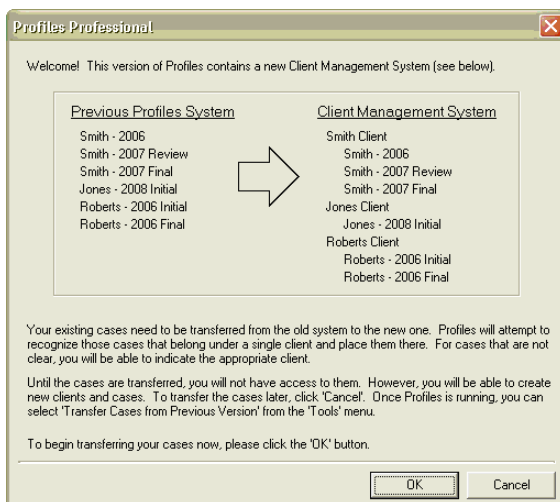
- Scenario 1: A single user transferring the data on first launch of Profiles Professional
- Scenario 2: A single user electing to transfer the data at a later time
- Scenario 3: A multiple-user system transferring the data at first launch

Scenario 1

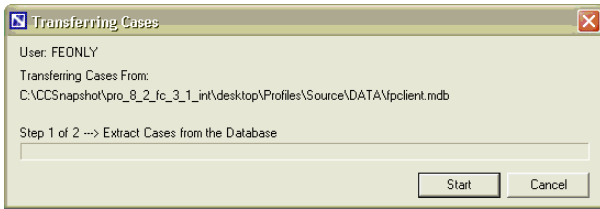
After you have installed the Profiles Professional application, transfer the data from your previous version to version 9.3.

To transfer the data to v9.3 from previous versions:

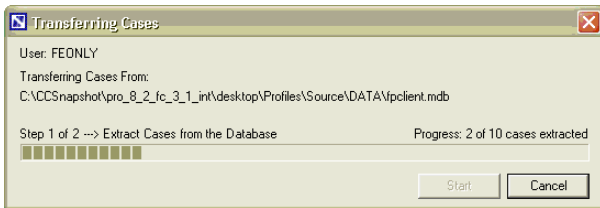
1. Launch the Profiles Professional application. The *Welcome* screen opens displaying the *Client Management System*.



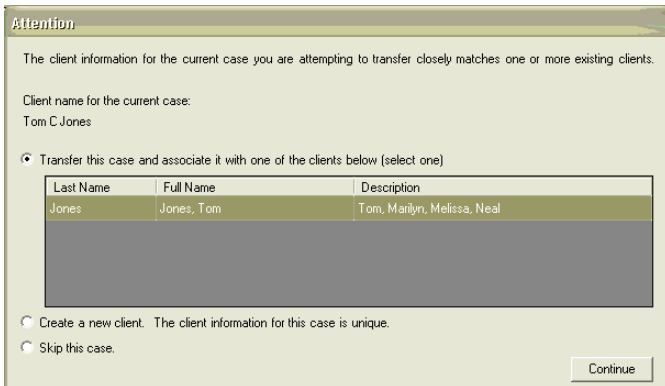
2. Click **OK** to start the data transfer. The *Transferring Cases* screen opens.



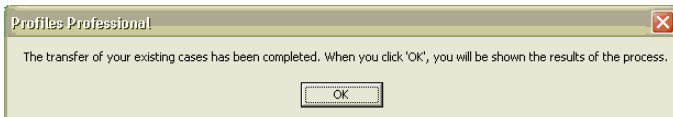
3. Click **Start** to start the data transfer. The *Transferring Cases* screen displays the progress of the transfer.



4. During the transfer of the cases, you may be asked for instructions on what to do if there are cases that are very similar. For example, two cases have the same first and last name, but the middle name is different. The *Attention* dialog box opens.



5. Select the option that best suits the type of transfer required, and then click **Continue**.
6. When all the cases have been transferred to the new structure, a message opens to notify you that the conversion is complete.



7. Click **OK** to close this message. The *Case Transfer Results* screen opens.



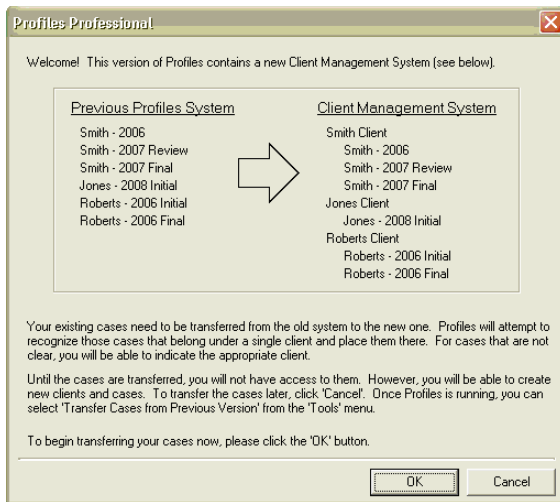
The *Case Transfer Results* screen displays information detailing the outcome of the transfer process. The result for a given case will be one of the following:

- **Transferred** – The case was migrated successfully to the new data store.
- **Skipped** – The case was a duplicate of a case already transferred, or was an existing case if the migration process was restarted from the *Tools* menu. This result will also be displayed for any cases that you elect to skip in the *Attention* dialog box.
- **<Error type> Error** – An error has occurred during the data transfer. In most situations, the error will show a brief message in the *Detail* column describing the error. If the error occurs during extraction, then *Extraction Error* will be displayed in the *Result* column.

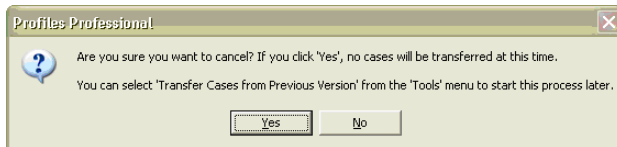
Scenario 2

This scenario covers the data transfer process if you have chosen not to transfer the data at the first launch of the application.

1. When the Profiles Professional application launches, a *Welcome* screen opens, displaying the *Client Management System*.

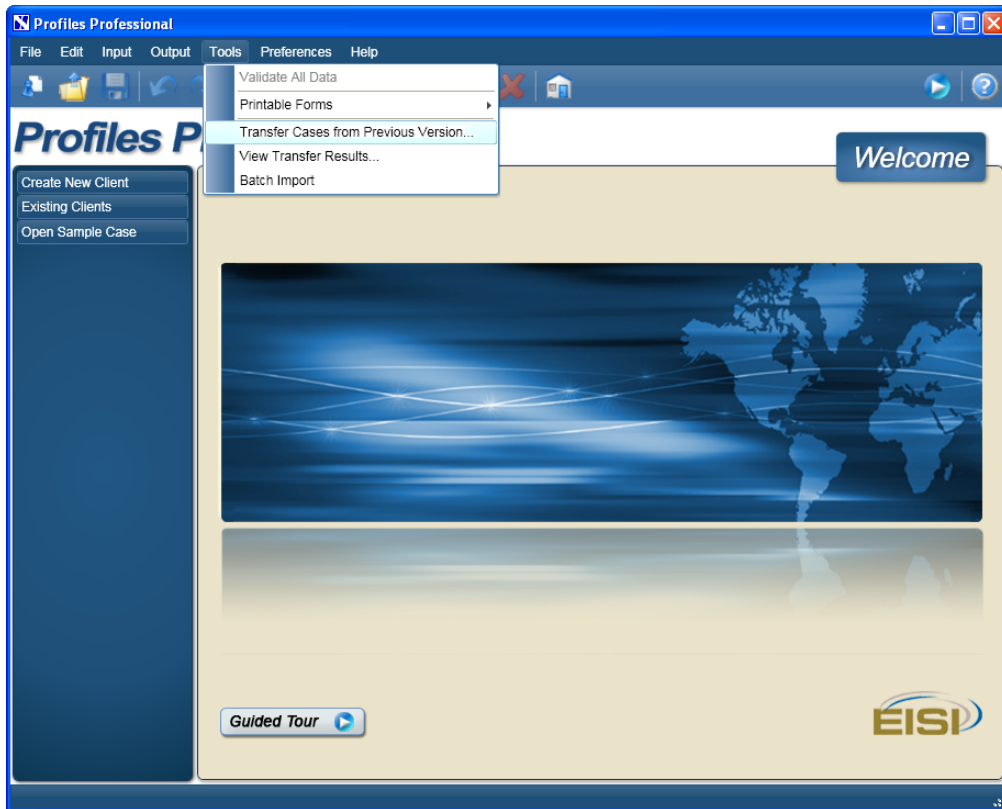


2. Click **Cancel** to close the screen and transfer the data at a later time. A confirmation message opens.

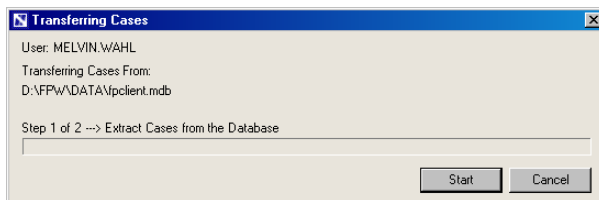


3. Click **Yes** to cancel the transfer process, and continue with the launching of the application.

- If at some point in the future you want to start the data transfer process, go to the **Tools** menu, and then select **Transfer Cases from Previous Version**.



- The *Transferring Cases* screen opens.



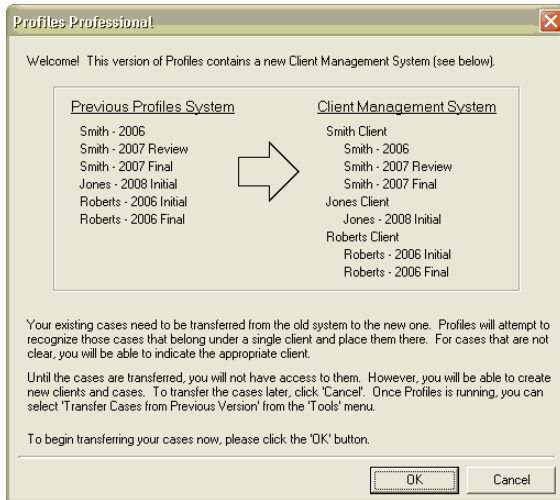
- Click **Start** to start the data transfer process. The *Transferring Cases* screen displays the progress of the transfer.
- From this point on, the process is identical to Scenario 1, steps 4 through 7.

Scenario 3

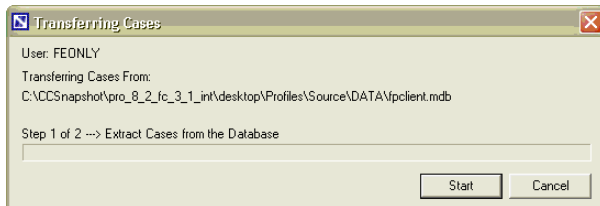
This scenario covers the data transfer process if there are multiple users, or a single user with two or more profiles, resulting in multiple ini files.

The INI files are essentially profiles for identifying users. To transfer the data to v9.3 from previous versions:

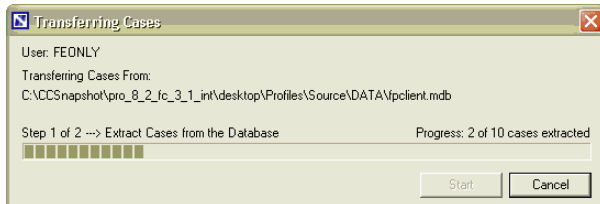
1. Launch the Profiles Professional application. A *Welcome* screen opens, displaying the *Client Management System*.



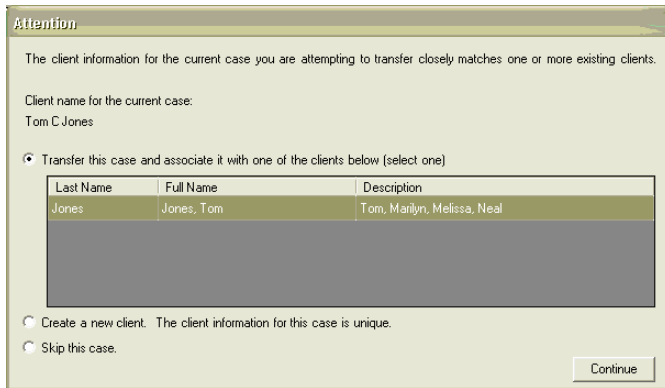
2. Click **OK** to start the data transfer. The *Transferring Cases* screen opens.



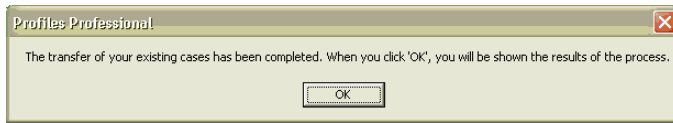
3. Click **Start** to start the data transfer. The *Transferring Cases* screen displays the progress of the transfer.



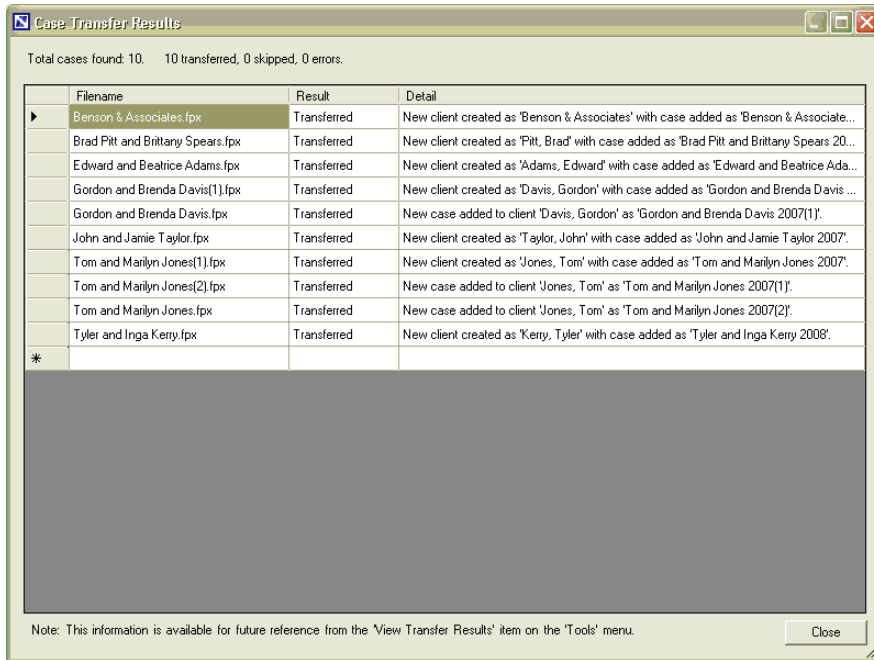
4. During the transfer of the cases, you may be asked for instructions on what to do if there are cases that are very similar. For example, two cases have the same first and last name, but the middle name is different. The *Attention* dialog box opens.



5. Select the option that best suits the type of transfer required, and then click **Continue**.
6. When all the cases have been transferred to the new structure, a message opens to notify you that the conversion is complete.



7. Click **OK** to close this message. The *Case Transfer Results* screen opens..

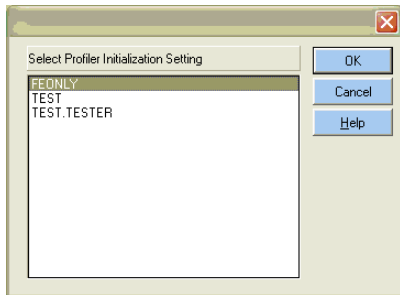


The *Case Transfer Results* screen displays information detailing the outcome of the transfer process. The result for a given case will be one of the following:

- **Transferred** – The case was migrated successfully to the new data store.
- **Skipped** – The case was a duplicate of a case already transferred, or was an existing case if the migration process was restarted from the *Tools* menu. This result will also be displayed for any cases that you elect to skip in the *Attention* dialog box.
- **<Error type> Error** – An error has occurred during the data transfer. In most situations, the error will show a brief message in the *Detail* column describing the error. If the error occurs during extraction, then *Extraction Error* will be displayed in the *Result* column.

This process will be repeated for each profiler found in the application directory. The cases are migrated and associated with a specific profiler.

Once you are finished reviewing the migration results for all profilers, the *Profiler Selection* screen opens.



Multiple INI Files

If you have multiple INI files, and cancel out of the transfer process without completing it, the *Transfer Cases* tool will not check all of the INI files again. It will only attempt to transfer cases for the Profiler who was selected during startup. If you cancel the transfer of multiple profiles part way through, to complete the process you will need to launch Profiles Professional and select the Profiler that you skipped, and then choose the *Transfer Cases* option for each of those Profilers.

Please note: If any of these steps are not successful, please contact the *EISI Technical Support Department* by telephone at 866-620-7510, select Option 3, and give the representative the Product Support Number (PSN), which is displayed at the top of the *License* dialog box.

