



Profiles Professional



*Installation
Documentation*



A very important note:

A new licensing mechanism has been implemented to Profiles products that will no longer allow the support of Pro-Edit and Network Installs. An alternative to a Network Install option is to install the application on a central server and on each individual user's computer; each user can then browse to the server to connect to a shared database. This approach (sometimes called "peer-to-peer") is a recommended alternative for a Network Install.

Section 1: Installing on a Desktop Computer

The following provides instruction for installing Profiles Professional on a desktop computer.

BEFORE INSTALLING...

Close all open programs (especially virus protection programs like McAfee VirusScan and Norton AntiVirus). Perform a backup of important client and personal data from previous installations of Profiles Professional.

Installing the Application

This guide provides the following two types of installation instructions:

- New User Installation
- Existing User Installation

New User Installation

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

- Step One: Installing the application
- Step Two: Authorizing your software

Step One - Installing the Application

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

1. Insert the 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 – Welcome Screen	Click – Next
License Agreement	If you agree to the terms of the agreement, select <i>I Accept the terms of the license agreement</i> and click - Next
Choose Destination Location Note: The default location is C:\FPW. You may change the destination prior to clicking Next . However, this is not recommended.	Click – Next
Start Copying Files Note: This screen provides a summary of the Current Settings.	Click – Install
Setup Status	No action is required as various operations will be automatically performed.
InstallShield Wizard Complete	You will be given two options: <ul style="list-style-type: none"> • View the Release Notes • Launch the application after the set up is complete You may check none, either or both, if so desired, then click Finish to acknowledge completion of the installation process.

Step Two – Authorizing your software

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

1. Click the **Help** menu – **Authorize**. 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 status says “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 on 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 EISI Software Authorization Department by telephone at (866) 620-7510 Option 1, and give the representative the site code (shown at the top of the *License* dialog box),

OR

- Click the **Prepare Authorization Form** button. The *Prepare Authorization Form* dialog box opens. Enter the required information, and then click **Print**. Fax the completed form to the EISI Software Authorization Department at (204) 975-3727.

EISI will provide you with an authorization key. Enter the Authorization Key, and then click Authorize to authorize the software. Click Close.

Existing Profiles v7.6 User Installation

As an existing Profiles v7.6 user, you will need to follow a three-step process in order to install Profiles Professional:

- Step One: Backing up your Client Files.
- Step Two: Installing the Application.
- Step Three: Authorizing your Software.

Step One – Backing up your Client Files.

1. Right-click on an empty space on your Desktop and select New – Folder.
2. Name the folder “Client Files”.
3. Open Profiles v7.6 and go to File – Batch Export...
4. A screen will appear displaying all your client files. Click once on the first client and then press the Shift and End key at the same time found on your keyboard.
5. Click OK.
6. You will then need to direct the client files to the newly created folder on your desktop (“Client Files”). Click Save.
7. Once the exporting is complete close the software.
8. Select Start – Control Panel – Add/Remove Programs.
9. Once the un-installation is complete continue on to Step Two.

Step Two - Installing the Application

1. Insert the disk into the appropriate drive. The application will automatically launch the "InstallShield Wizard" screen.
2. On the following screens, make these selections:

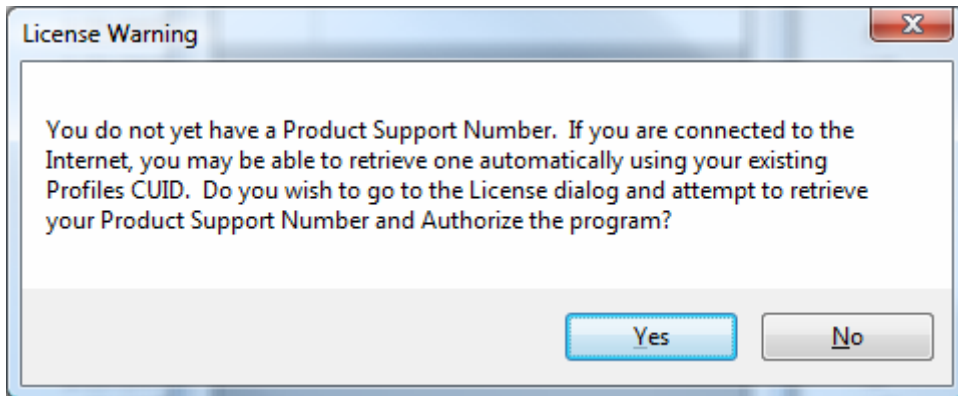
Screen Name	Command
InstallShield Wizard	Click – Next
License Agreement	If you agree to the terms of the agreement, Click – I Accept
Destination Path Note: The default location is C:\FPW. You may change the destination prior to clicking Next . However, this is not recommended.	Click – Next
Program Folder (the default folder is C:\fpw)	Click – Next

Start Copying Files Note: This screen provides a summary of the Current Settings.	Click – Next
Setup Status	No command action is required as various operations will be automatically performed.
InstallShield Wizard Complete	You will be given two options: <ul style="list-style-type: none">• View the Release Notes• Launch the application after the set up is complete You may check none, either or both, if so desired, then click Finish to acknowledge completion of the installation process.

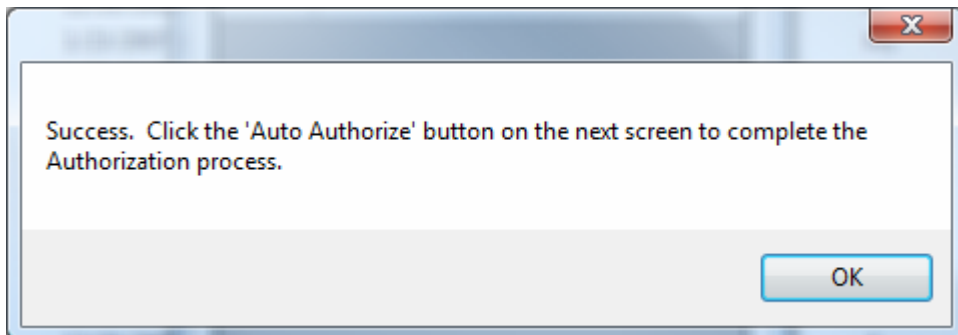
Step Three – Authorizing your software

Profiles Professional must be authorized for continued use. An authorization key and product support number (PSN) are required to license the software. When the program first starts up, the following occurs:

1. A License Warning message will appear:



2. Click Yes – The program will attempt to automatically retrieve your product support number
3. If successful, the following message is displayed:



4. On the next screen click Auto Authorize, and then click Close. No further steps apply.

Please note: If any of these steps are not successful, please contact the EISI Software Authorization Department by telephone at (866) 620-7510 Option 1, and give the representative the site code which is displayed (shown at the top of the License dialog box).



Section 2: Migrating from a Network Install / Sharing Your Database

You may have previously implemented a network installation. It will now be necessary to for you to implement a shared database configuration. Otherwise, if installing for the first time, you may be using the application on more than one computer in your network and wish to share a single database. Please follow the instructions below regardless if you are migrating from a network installation or sharing a database:

1. Choose the computer you would like the other computers to share.
2. Make sure that the database location can be reached by other computers via the network.

NOTE: The database name is 'Fpclient.mdb' and is typically located in the data folder within the Professional application folder (i.e. c:\fpw\data)

3. From the remote computer, run Profiles Professional and click on the "Utilities...Options...Directories" option. In the database box, click browse and navigate to the location of the stored database. Confirm this and click ok to finalize the process.
4. Restart Profiles Professional, this will now use the central shared database

Quick Tip: When using a shared database configuration, it is inadvisable to open up the same client from more than one computer.

Section 3: Helpful Database Usage Tips

Backing up the Database vs. Exporting Clients

You can back up your client cases by making a copy of the entire database, or exporting the individual clients to a disk. You can make a backup quickly by clicking on "Utilities...Backup Database" option (some versions of Profiles+ Professional or Profiles+ Forecaster will not have this available). This will allow you to make a compressed copy of your entire database to your local hard drive, but preferably to another hard drive or Zip disk. This is good for administrators that take care of large databases for many agents. Single agents may be able to fit the entire database on one floppy disk, but be warned, once the database becomes too large to fit on a floppy, you can't split the database onto multiple disks. At this point, you would have to revert to one of the previously mentioned methods. When restoring from the backed up database, the current database is completely substituted with the backed up one. When importing individual clients, only that particular client is substituted. This is useful when you make a mistake on one client and just want to restore that client's data.