

## The Professional Office (TPO)

### Quick guide

- Visit our download webpage [www.ptpsoftware.co.uk/getmysoftware](http://www.ptpsoftware.co.uk/getmysoftware)
- Select the “**The Professional Office (TPO)**” link on the Software Downloads webpage
- Select the “**TPO Installation**” link and follow the installation wizard
- Choose the Network Status as appropriate
- After the installation, close the Deployment Wizard by clicking Finish, then open the TPO program and run the Initial Setup Wizard
- At the end of your 30 day free trial, enter your licence details via the Licence Key Entry program

### Detailed guide

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

TPO is supplied via a download page on the PTP Software website, [www.ptpsoftware.co.uk/getmysoftware](http://www.ptpsoftware.co.uk/getmysoftware). From the list of programs on the page choose **The Professional Office (TPO)**, and then select the “**TPO Installation**” link. You can then follow the on screen Installation Wizard.

**Please note:** If installing on Microsoft Windows Vista or Windows 7, the installation will cause a User Account Control (UAC) message to be displayed seeking permission to run the installation.

The TPO Deployment Wizard will guide you through the process to make it as easy as possible, there are however some points to note.

The installation routine is split into two constituent parts:

- Selection of the network installation type and the necessary preparation
- The installation of the program itself

The Deployment Wizard will ask you to choose a network status. There are three options:

#### **Option 1** - stand alone installation

If you are installing TPO for use only on one workstation with the data stored locally then select option 1. This option should also be used when installing additional workstations on a network (following an installation using option 2 on the master machine).

#### **Option 2** - network installation

If you are installing TPO databases to a file server, or a computer that several people connect to in order to access the TPO databases then select option 2.

#### **Option 3** - workstation upgrade installation

This option is for upgrading existing network workstation installations only and should not be used for new installations.

If you select option 1 you will be taken directly to an 'install application' screen. Select The Professional Office - Including Task Tracker and click Next. This will start The Professional Office - Setup Wizard (see below). If you selected option 2 see Installing on a network below.

## The Professional Office Setup Wizard

During the installation you will be asked for the location in which the program is to be installed. We strongly recommend that you install to the default location.

The Setup Wizard will then ask you to choose a Setup Type:

### Standalone user or Network Administrator

This is the default installation and should be used for stand alone installations and for network users that need the administrative programs. It includes all the core program files, system administration programs, mailing wizard templates and database files. This installation must be run on at least one workstation in a network environment.

### Standard network user

This should be used on all the other machines on the network. It installs the main program files without the administrative programs.

### Custom

This option is used if you would like to look at a demo database as an alternative to the free 30 day trial.

**Please note:** If you choose this option and then decide to purchase TPO you will not be able to retain the data you have input.

After the Installation, close the Deployment Wizard by clicking Finish.

**Please note:** Depending on which files your system already contains, Microsoft Windows may require you to re-boot.

To start the TPO program click Start, All Programs, PTP Software, The Professional Office and The Professional Office. You will then be asked to 'locate database files'. If you have installed to the default location you can simply click OK and continue to run the Initial Setup Wizard. If you are installing on a network (see below).

### Registration

To enter your registration details, open the Licence Key Entry program by clicking Start, All Programs, PTP Software, The Professional Office, System Administration and Licence Key Entry. Then enter the details from your Registration Document EXACTLY as shown.



**Important note:** It is important that you keep the registration document.

## Installing on a network

### Quick guide

- The program needs to be installed on each workstation
- The database files need to be installed to a shared area on the server
- The program on each workstation needs to be told to look for the data on the server
- At the end of your 30 day free trial, enter your Licence details via the Licence Key Entry program on one workstation

## Detailed guide

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

TPO works on both Peer to Peer and dedicated file server networks. Whatever system is in use all users must have permanent READ and WRITE access to the folder containing the data files.

Please note that if installing on Microsoft Windows Vista or Windows 7, the installation will cause a User Account Control (UAC) message to be displayed seeking permission to run the installation.

The Deployment Wizard will ask you to choose a network status. There are three options see above. On the first workstation you should select option 2. This will take you to a 'Locate Data Files' page where you enter or browse for a data location. We strongly recommend that data is not stored within the Program Files directory structure. Instead, we would advise that it is stored in a dedicated Data folder within a shared documents folder to protect it from virtualisation under Microsoft Windows Vista and Windows 7. For example:

Windows 2000/XP shared data location would be C:\Documents and Settings\All Users\Shared Documents\PTP\TPOS\Data

Windows Vista shared data location would be C:\Users\Public\Public Documents\PTP\TPOS\Data

If you are running a dedicated server then using the above paths you will need to map a drive letter e.g F:\PTP\TPOS\Data where F is the drive letter assigned to the server.

If you are running a Peer to Peer network you will need to map a drive letter (F in our example) to the designated shared area on the acting server e.g. \\Example\C\Documents and Settings\All Users\Shared Documents\PTP\TPOS (for Windows 2000/XP) or \\Example\C\Users\Public\Public Documents\PTP\TPOS (for Windows Vista). Here, Example is the name of the computer on the network acting as a server. The path to the database folder from the client workstations would then be F:\Data.

The path to the database folder should always end in Data. When you have selected the path for the data, Clicking Next will take you to a 'Preparing disk images' page where you can choose to copy installation disk images to a commonly accessible network location. This will allow you to browse the network for the setup files rather than taking the CD to each workstation. Clicking Next will then take you to a Preparing Data for Use screen for you to copy the databases and installation files to your chosen location.

Once the data files and installation files have been copied clicking next will start The Professional Office Setup Wizard (see above)

For this first installation, the Stand Alone user or Network Administrator option should be run. To complete the initial installation, start the TPO program by clicking Start, All Programs, PTP Software, The Professional Office and The Professional Office. You will then be asked to 'locate database files'. Use the browse feature to locate the data directory F:\Data in our example and click OK.

You must run the Initial Setup Wizard before installing on any additional workstations. This will allow simple connection to the shared data. Once the Initial Setup Wizard has been run on the first machine the installation needs to be run on each additional workstation within a network system. To install on subsequent workstations you can either choose to install option 1 from the CD or browse the network to run the installation disk images setup file. F:\Data\Update\DiskImage\TPAO\Disk1\Setup.exe (in our example)

To complete the workstation installation, start the TPO program by clicking Start, All Programs, PTP Software, The Professional Office and The Professional Office. You will then be asked to 'locate database files'. Use the browse feature to locate the data directory F:\Data in our example and click OK.

Once the 30 day free trial has come to an end you must follow the instructions in the registration section above.