

## PTSLite Installation Guide

The CD should autorun, if it fails to do so, locate and run 'setup.exe' on the CD.

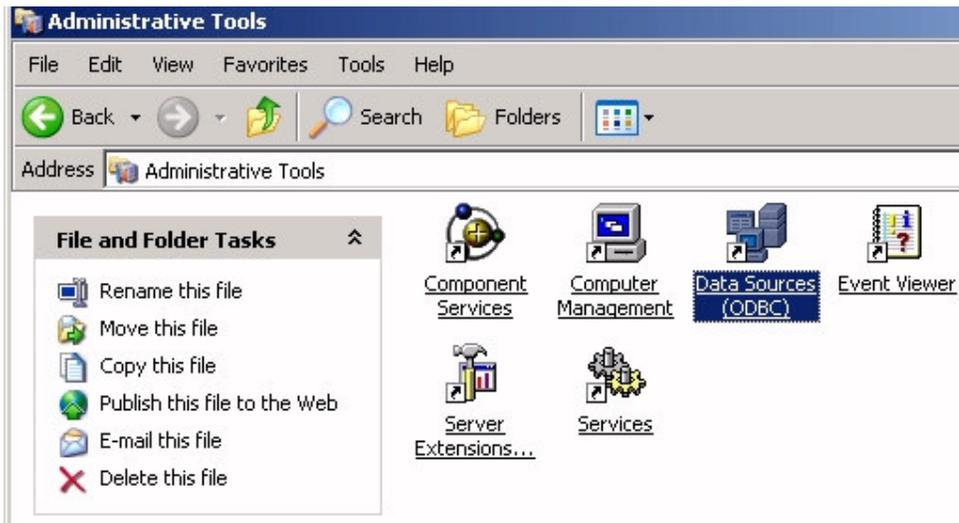
The software will automatically install into a default directory (PTSLite) in the Program Files directory - you can change this if you wish during installation.

An MS Access database, PTS5.mdb will also be installed in the same directory.

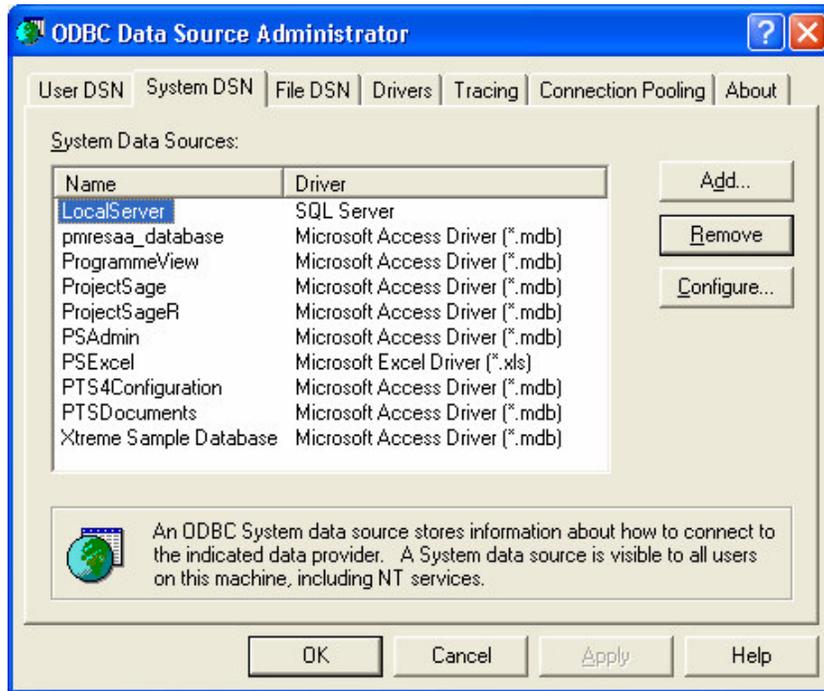
If you are planning multiple installations sharing the same database, this needs to be copied to one machine (server) on the network. The database is password protected and can not be opened directly.

In order for PTSLite to operate, an ODBC connection needs to be established with the System DSN (User DSN on '95, '98, ME) PTS5.

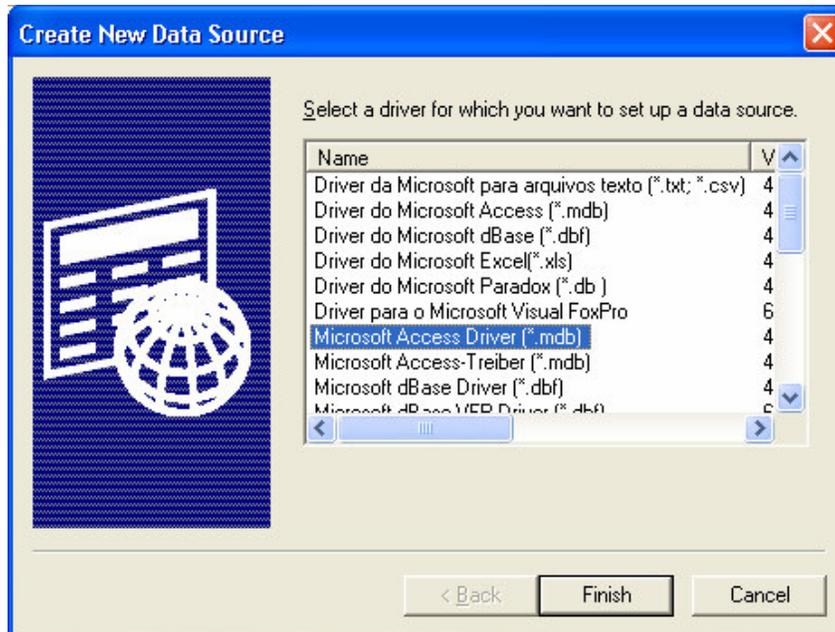
The ODBC setup is either found in the Control Panel ('95, '98, ME) or in the Administrative tools on NT4, 2000 and XP



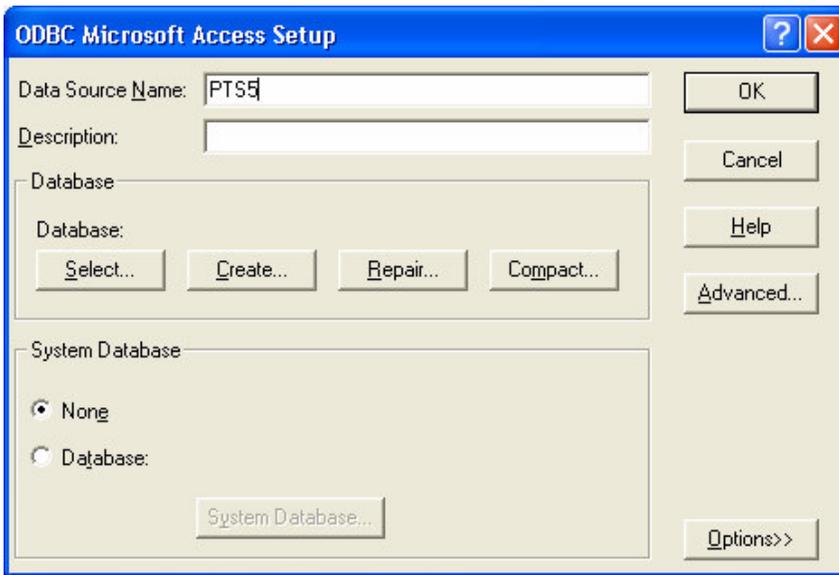
Once the tool is opened, select the System DSN Tab



Click on Add to create a new DSN



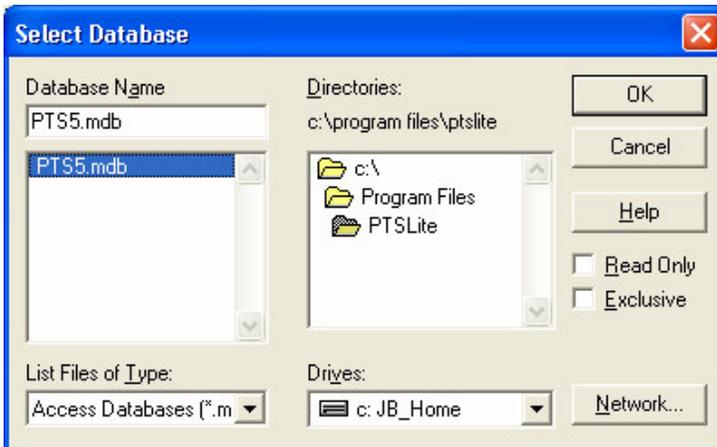
Select the Microsoft Access Driver and click Finish



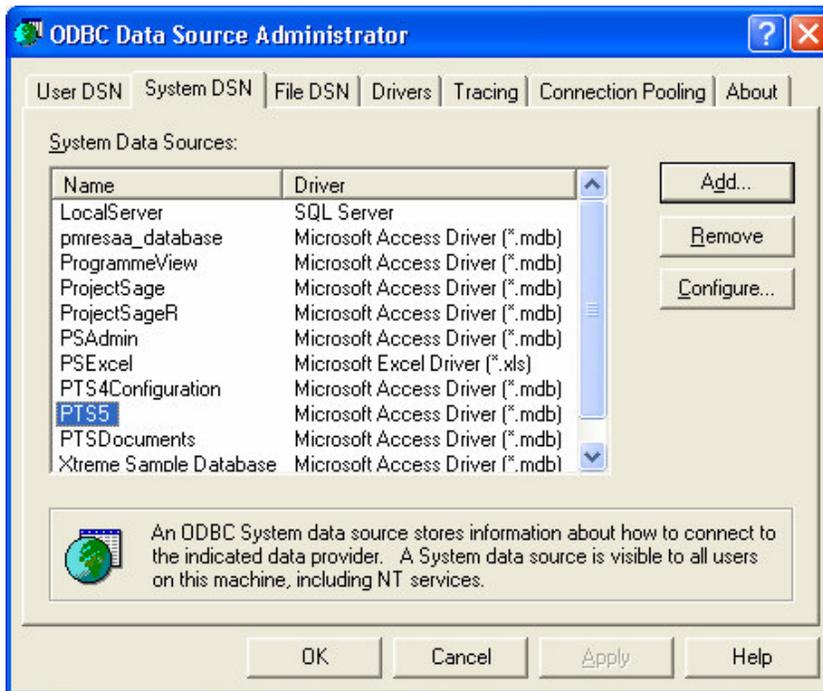
Enter PTS5 as the Data Source Name - NB this must be exact with capitals and no space between Project and Sage.

Click on select to browse for the directory where PTS5.mdb has been installed.

N.B. if it is on the network and a shared database is being used, click on the Network button to locate it.



Click on OK and the System DSN tab should now look like

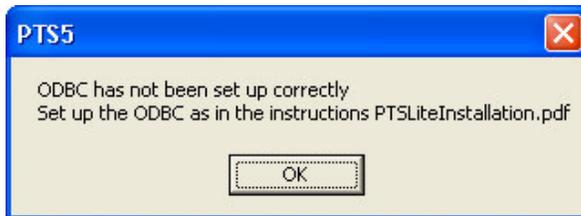


In '95, this appears in the User DSN tab even when entered in the System DSN.

Click OK and close the ODBC Administrator and Control Panel dialogue boxes.

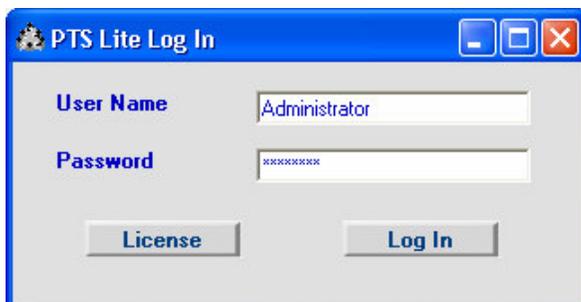
An ODBC connection has now been established, and ProjectSage/ProjectView is ready to run.

If ODBC is not setup properly the following will appear when you start the application

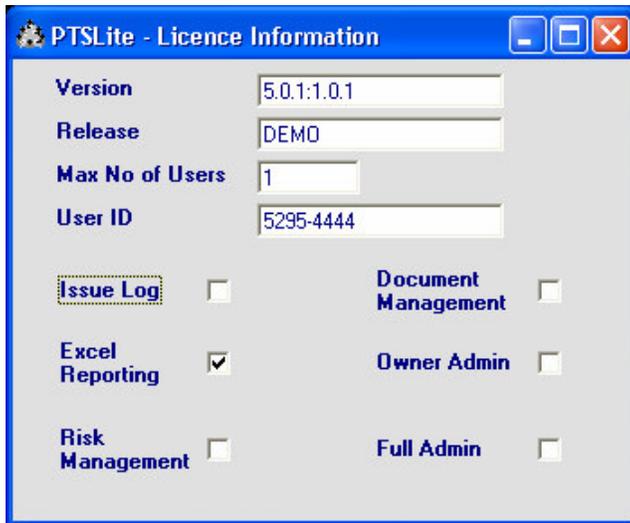


## First Time Execution

The first time you use the system it will display the following LogOn screen

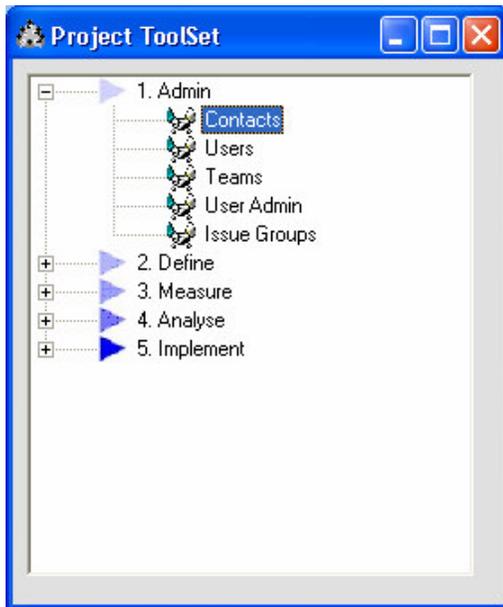


Do not change anything, it is preset to 'Administrator' and 'password' in the database. The first installation is a 14 day Demo version which includes the Excel reporting option. Clicking on License displays



Which shows which version, release and options are installed along with a unique User ID.

This UserID will be needed for any upgrades/changes from the standard Demo version.



PTSLite uses an explorer style menu for navigation purposes, clicking on the +/- icons opens and closes the various nodes. Clicking on any item invokes that part of the application, e.g. clicking on Contacts causes the Contacts form to open.

The database has a single user and single contact already loaded

The 'Contacts' window displays a selected contact, Jim Brotton. On the left, a table shows the contact's first and last names. On the right, a form contains fields for First Name, Last Name, Title, email, Company, Telephone, and Mobile. At the bottom left, there are buttons for Edit, Add, Refresh, and Delete.

First Name	Last Name
Jim	Brotton

**Selected Contact** Jim Brotton

**First Name** Jim  
**Last Name** Brotton  
**Title** Managing Director  
**email** jb@pmresource.co.uk  
**Company** PMR Systems  
**Telephone** 01223 263992  
**Mobile** 07887 990 977

Buttons: Edit, Add, Refresh, Delete

You can click on Edit to change this to your own information and to add as many contacts as you like.

These contacts can be selected to be part of Project Teams.

Once you have changed the Contacts data, select the Users option.

PTSLite is a multi user system, as many users can be added as the licence permits. Once the number has been reached the Add button is no longer visible. You can, however, still Edit and Delete User data.

The 'Multi Users' window displays a selected user, Administrator. On the left, a table shows the user's password. On the right, a form contains fields for User Name, Password, and Contact. At the bottom left, there are buttons for Edit, Refresh, and Delete.

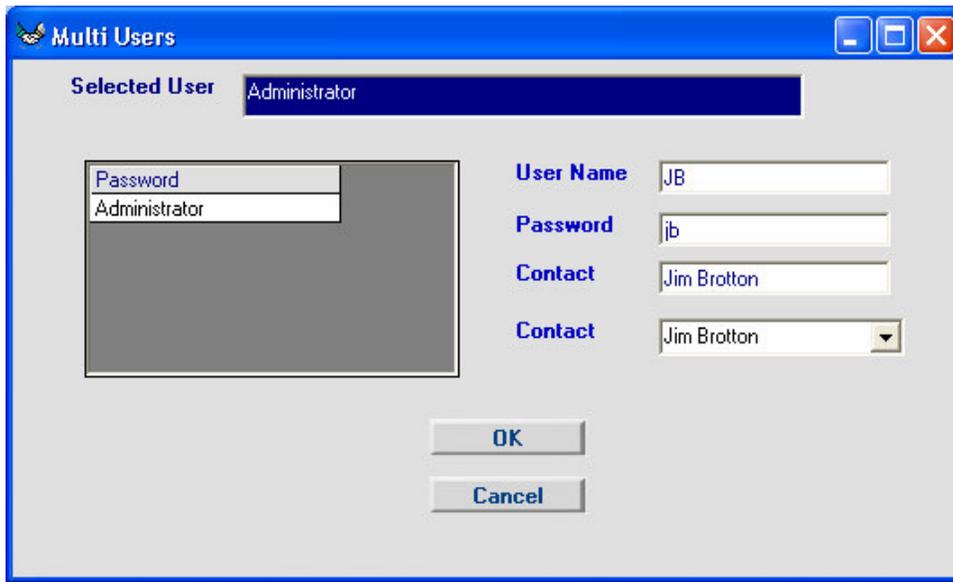
Password
Administrator

**Selected User** Administrator

**User Name** Administrator  
**Password** password  
**Contact** Jim Brotton

Buttons: Edit, Refresh, Delete

It is an idea to change even a single user's name and password to one which you find easier and more secure.



This completes the basic setup. For multiple users, this client software needs to be installed on each machine, and ODBC set up to the machine the database is stored on.