



agathon HR

Personnel Manager Installation Guide

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Prepared by AgathonHR

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1. VBTPM Installation

These notes are a checklist for use when installing VBTPM Multi User on to an NT4 Server/Workstation:

1.1 Server

MUST ENSURE THAT YOU CAN LOG ON AS AN ADMINISTRATOR AND HAVE FULL ACCESS

1. Set up a directory on the SERVER called Vizual
2. Create a SHARE for this directory and give relevant people, FULL CONTROL access.
3. Ensure that the NT Administrator has access to this share:
 - Right click on VIZUAL Directory
 - Select Properties
 - Select SHARE tab
 - Add users Inc Administrator with FULL CONTROL access
 - Click on SECURITY Tab
 - Add users and administrator with FULL CONTROL access
 - Click OK

1.2 Workstation

1. Log on as administrator
2. Map 'V' Drive to [\\VIZUAL](#) directory on Server.
3. Install CD ROM
4. Select Utilities to load
5. Choose Destination for PROGRAM FILES (C:\Program Files\PersMan on workstation)
6. Choose destination for DATABASE FILES ([\\VIZUAL\PersMan](#) on SERVER)
7. Follow wizard to complete installation.

2. Installing Personnel Manager onto another PC

First Map a network drive using existing drive mappings on other installations (Must use same drive letter etc)

1. Insert CD
2. Click Next
3. Select Personnel Manager option only
4. DO NOT SELECT DATABASE FILES OPTION
5. Next
6. Enter company name
7. Next
8. (Install PM Program files into default directory) Next
9. Choose the location of the database files using mapped drive
10. Next
11. Next
12. Next
13. Next
14. You will then be asked if you want to install Acrobat Reader. If YES follow instructions, if NO click NO

15. Click Finish

Personnel Manager should now be installed on the PC

Use existing security username and passwords to logon.

3. Re-installing VBTPM without losing Data etc

There may be circumstances where it is necessary to re-install VBTPM, without however, losing user defined elements such as reports or new screens and data. The following guidelines describe the processes which should help this procedure without losing any of the Clients data etc.

1. Perform a full VBTPM backup within the Maintenance Utility saving the file to a separate location on the server.
2. Export and save all Screens, Reports and employee data onto a separate directory on the server.
3. Perform a complete backup of the Server to tape, thus saving the database, system data and employee data without losing it.
4. Now that all the angles are covered to prevent loss of data, completely uninstall the software from both the server and the workstation.
5. Double check, to ensure that no VBT files remain on either system.
6. Reinstall the software from the latest CD-ROM onto the server via a workstation.
7. Import all the Screens, Reports and Employee Data.

3.1 To Save a New/Customised Screen

1. Open the Screen Designer Utility
2. Choose the EXPORT SCREEN from the FILE Menu.
3. Select the screen to export by clicking on the relevant checkbox so a tick is displayed.
4. Type a note/comment if required.
5. Click START
6. Choose a name and location for the exported file and click OK.

To import a screen simply reverse this process.

3.2 To Save data from a New Screen:

This process will only save the displayed record within the current screen and therefore will need to be repeated for each person in the database:

1. Select the Screen within VBTPM and then the record.
2. Select EXPORT TO FILE from the SCREENS menu
3. Provide a name & location for the exported data using the dialogue box.
4. Click OK.
5. Open the exported file (By using SEND TO Notepad).
6. Re-format the file so that the employee number is included within the file, adding EMPLOYEE NUMBER to the field headers.
7. Save this file as *FILENAME.txt*.
8. Repeat this process for the next person/record.

9. Combined all the text files into one combined data text file. Do this by cutting and pasting the details, or import them individually.

3.3 Creating an Import Template and Importing Data.

1. Select IMPORT DATA from FILE MENU.
2. Select "I want to create and use a new import definition".
3. Choose file "*filename.txt*" by using BROWSE button.
4. Select or Deselect "First row contains headings" depending if the file has or not.
5. Select the table which you want the data to be imported into using the "Import into" field.
6. Click NEXT
7. Click NEXT
8. In the Personnel Field column, map the fields in the data file to the fields in the table.
9. Select "I want to save these details as a template then import data now".
10. Click Finish

3.4 Exporting/Importing a Report

3.4.1 Exporting

1. Open the Report Browser by clicking on the REPORT button on the Toolbar.
2. Select the report you wish to export.
3. Select EXPORT OBJECT from FILE Menu.
4. Choose the location where you want the report to be exported to.
5. Click OK.

3.4.2 Importing

1. Open the Report Browser by clicking on the REPORT button on the toolbar.
2. Select IMPORT OBJECT from the FILE menu.
3. Click on the BROWSE button to locate the file to be imported.
4. Select where you want the Report to be imported by selecting SKILLS from the Folder field.
5. Type a description for the report, in this case, "Skills Profile".
6. The Skills Profile Report will now be available for use within the Skills Reports folder.

Once this process has been done for all of the chosen Reports, Screens and Data, then copy all the exported files into a directory which is totally separate to where the VBTPM files are stored. Then make a back up of the database and Global Data to the same file location.

You can then un-install the software using the UNWISE.EXE uninstaller application.

Re-install the software once all the existing VBTPM files have been uninstalled and deleted from the PC/Server.

4. Upgrading Visual Personnel to Personnel Manager

1. Install Multi-User Version VBT Personnel Manager onto Network File Server.
2. Install VBT Personnel Manager Program Files on all Workstations and check that the system works on everything.
3. Log Off all users from all VBT applications.
4. Run the VBT Personnel Manager Upgrade Wizard which can be located at:

C:\Program Files\PersMan\VBTUpgrade.exe

5. Press Start to begin the upgrade.

5. Moving databases from a standalone PC to a server.

5.1 Option 1:

1. Copy the database files to new location.
2. Open the BDE admin from control panel and remap all VBT30_.... entries to the new location except VBT30_VBTlocaldata.
3. On the Config tab browse to Drivers\Native\Paradox and remap the netdir path to the new location.

5.2 Option 2:

1. Backup all PM Databases.
2. Uninstall PM.
3. Reinstall PM placing the databases on the server.
4. Restore databases using Database Maintenance