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# **Jenzabar CX**

## **QuickMate**



**Installation Guide**

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JENZABAR, INC.  
QUICKMATE INSTALLATION GUIDE

TABLE OF CONTENTS

<b>SECTION 1 - GETTING STARTED .....</b>	<b>1</b>
Overview .....	1
Introduction .....	1
Purpose of This Guide.....	1
Intended Audience.....	1
Jenzabar Support Agreement .....	1
Getting Started .....	2
Introduction .....	2
Tasks Prior to Installation .....	2
Exiting the Setup Program.....	2
Canceling the Installation .....	4
Uninstalling QuickMate.....	4
<b>SECTION 2 - ADMINISTRATOR SETUP INSTALLATION .....</b>	<b>5</b>
Overview .....	5
Introduction .....	5
Before Installing .....	5
Network Configuration .....	5
Installing QuickMate onto a Network.....	6
How to Install onto a Network.....	6
Installing QuickMate through the Add/Remove Programs applet .....	9
Files Installed.....	10
Reinstalling QuickMate.....	10
UNIX Modifications for QuickMate Applications.....	11
Network Configuration .....	11
Disabling a QuickMate Application.....	11
<b>SECTION 3 - PC INSTALLATION .....</b>	<b>13</b>
Overview .....	13
Introduction .....	13
QuickMate Icons .....	13
Telnet Program .....	13
Setting Up PCs .....	14
Specifications for QuickMate .....	14
Recommendations for PC Setup.....	14
Recommended Graphics Card.....	15
Terminal Emulation.....	15
Pager Setting .....	15
TCP/IP Installations .....	15
End User Installation Types .....	16
Networked Workstation Installation .....	16
Stand-Alone Workstation Installation .....	16
Startup Options.....	17
Introduction .....	17
Add QuickMate to Startup folder .....	17
Installing QuickMate on a PC .....	18
How to Install on a PC .....	18
Installing QuickMate through the Add/Remove Programs applet .....	22
Networked Workstation Installation .....	22
Stand-Alone Workstation Installation .....	23

Reinstalling QuickMate.....	23
<b>INDEX .....</b>	<b>25</b>

# SECTION 1 - GETTING STARTED

## Overview

### Introduction

QuickMate is a Graphical User Interface (GUI) that Jenzabar has developed for CX. QuickMate is Jenzabar's first step into client/server architecture using Microsoft® Windows™.

### Purpose of This Guide

This guide serves as a learning tool and reference guide for installing the QuickMate product of CX. The information in this guide can help you install the QuickMate files on a network, set up a workstation to run QuickMate from a network, or install files for stand-alone use on a PC.

### Intended Audience

This guide is to be used by the system users in your institution's computer center. System users include the Jenzabar coordinator, Jenzabar system administrator, and programmer/analysts.

### Jenzabar Support Agreement

For additional installation support, or help in setting up the Jenzabar/QuickMate interface, Jenzabar systems consultants are prepared to assist you as required, on a time and materials basis. You can contact Consulting Services to arrange for assistance related to installation of QuickMate on your local PC network. In addition, Jenzabar Support Services personnel are prepared to handle the support of the applications within CX running under QuickMate on a single, vanilla PC in the computer center.

# Getting Started

## Introduction

The following tasks provide important information you need to know before you begin to install QuickMate.

## Tasks Prior to Installation

You need to accomplish the following general tasks at your institution before you install QuickMate.

**Note:** In phases 3-5, you have the network in place.

1. Ensure your institution has implemented the Release I product of CX.
2. Ensure your institution's end users have personal computers (PCs) for workstations, which are running Microsoft Windows.
3. Ensure the network cable is running to all end-user offices for which you want to run QuickMate.

**Note:** To obtain additional assistance in setting up the TCP/IP protocol to network to all the desired end-user PCs, do the following:

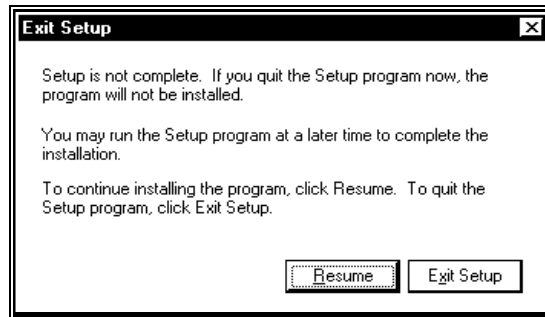
- Obtain a reference text on TCP/IP.
- Contact the Consulting division at Jenzabar.

4. Ensure your institution has a network (both hardware and software) in place that, at a minimum, connects the PCs in the end-user offices to the host computer.
5. Connect the workstations directly to the network using a network adapter card.
6. Ensure each workstation contains the following:
  - Software to communicate over the network (TCP/IP protocol)
  - WINSOCK.DLL
  - A network-based terminal emulator
7. Determine which of the following ways your institution wants to administer the QuickMate applications:
  - Install a copy of QuickMate on each individual PC
  - Install one copy of QuickMate on a network file server for all users to access

## Exiting the Setup Program

You can exit from the QuickMate setup program before completing the QuickMate installation whenever the dialog box contains a Cancel button. Follow these steps to exit before completing the installation:

1. Click on **Cancel**. A warning box appears.



2. Click on **Exit Setup**. You have exited from the setup program without completing the installation.

**CAUTION:** If you cancel the QuickMate setup program, you must re-run the setup program to completely install QuickMate.

### Canceling the Installation

You can cancel the QuickMate setup program while copying files whenever the Cancel button appears. If you select **Cancel**, the Exit Setup dialog box appears. Select **Exit Setup** to exit the setup program before QuickMate is completely installed.

**CAUTION:** If you cancel the QuickMate setup program, you must re-run the setup program to complete the installation of QuickMate.

### Uninstalling QuickMate

If you complete the installation, but later decide to remove the application, use the Add/Remove Programs applet from the Windows® 95 Control Panel.

- To remove the Administrator Setup Installation, remove “QuickMate on Network.”
- To remove the Networked Workstation Installation or the Stand-alone Workstation Installation, remove “QuickMate.”



## SECTION 2 - ADMINISTRATOR SETUP INSTALLATION

### Overview

#### Introduction

An institution's network supervisor can install QuickMate on a network server. The QuickMate setup (*setup.exe*) program contains the *Administrator Setup* option, which copies all files onto a network file server, including the installation program files. After the network supervisor performs this installation on a network drive, a PC user with appropriate access permissions can install and run QuickMate from the network.

#### Before Installing

Perform the following tasks before you attempt to install QuickMate on a network.

1. Determine the network destination for the QuickMate installation files. The network destination must be a public directory that end users can access.
2. Ensure the network destination where you will install QuickMate is currently available and mapped to a drive on your PC.
3. Ensure you have sufficient privileges (e.g., Novell Supervisor) to the network drive where you will install QuickMate. For example, can you copy, rename, write, delete, read, and create files and directories?

#### Network Configuration

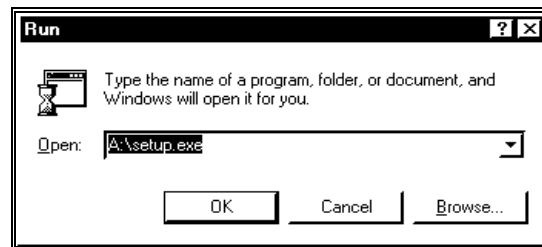
When setting up your network, you do not have to make any special configurations for QuickMate.

# Installing QuickMate onto a Network

## How to Install onto a Network

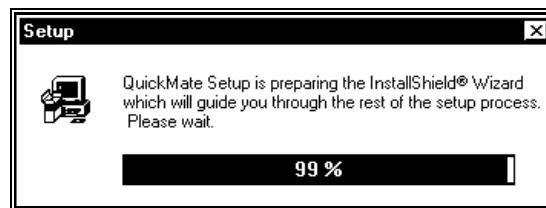
Follow these steps to install QuickMate on your institution's network using the QuickMate setup program:

1. Open the Run dialog box from your Start menu.

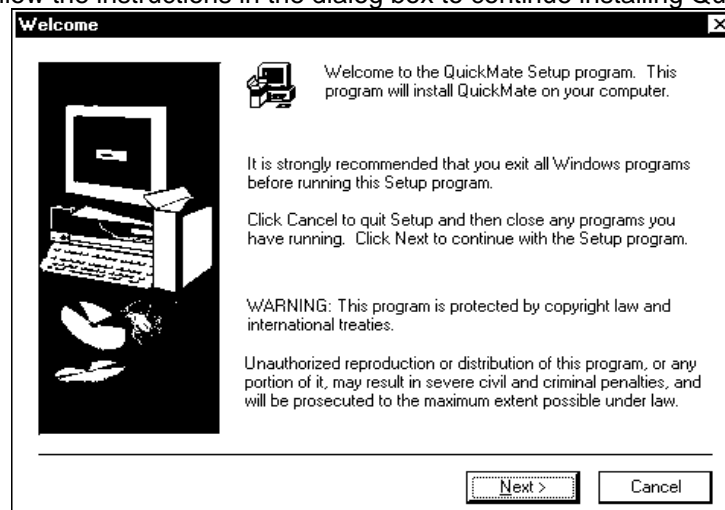


2. In the Run box on the command line, enter the path for the QuickMate setup program.
  - If you are installing QuickMate from a floppy diskette, insert the disk containing the QuickMate files in your PC's drive A (or B), and enter: **a:\setup** (or **b:\setup**).
  - If you are installing QuickMate from a file server, enter the network path and setup (e.g., **N:\QuickMate\setup**)

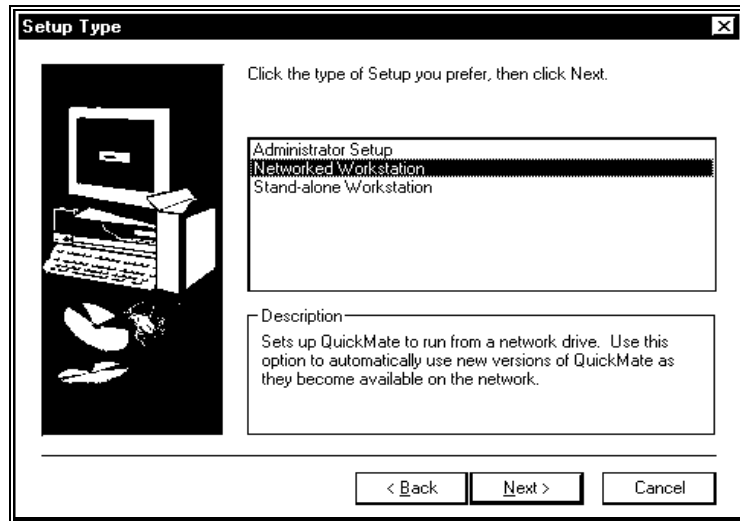
The following window appears, asking you to wait.



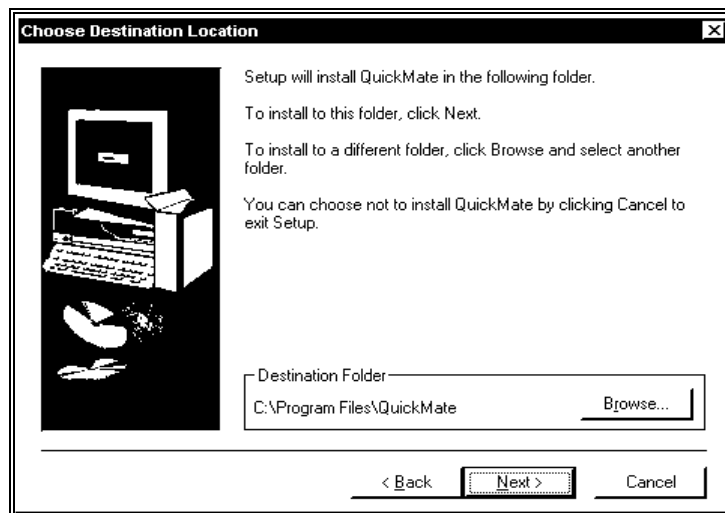
3. The Welcome dialog box will appear, reminding you to close any programs you have running. Follow the instructions in the dialog box to continue installing QuickMate.



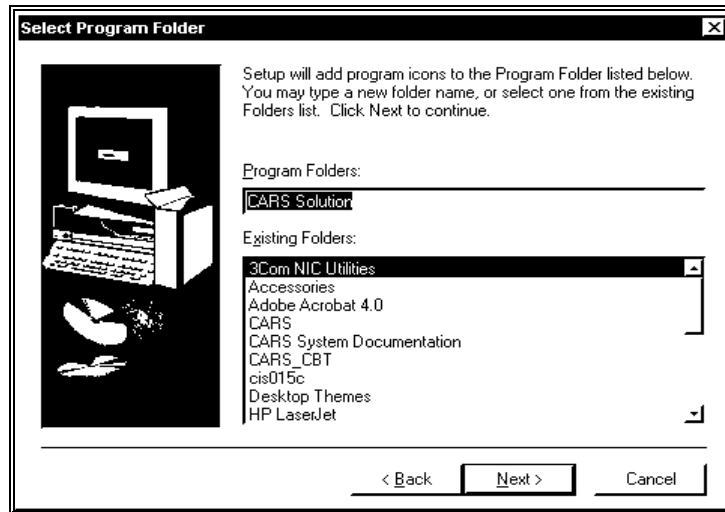
4. A Setup Type dialog box will appear.



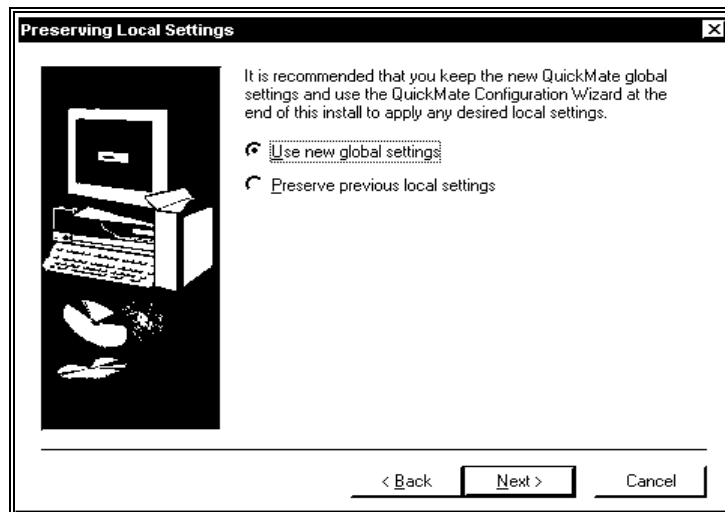
5. Select **Administrator Setup**, then select **Next**. A Choose Destination Location dialog box will appear.



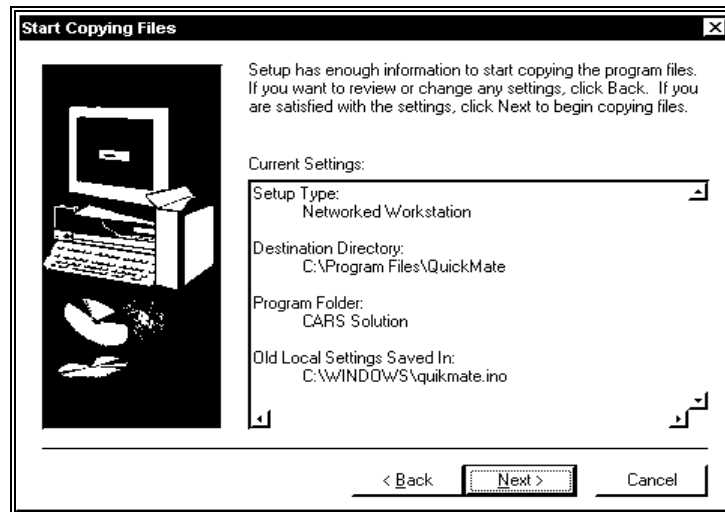
6. Choose the directory to which you want to install CX. A Select Program Folder dialog box will appear.



7. Choose **Next** to install QuickMate in the CX program group, or choose another program folder. A Preserving Local Settings dialog box will appear.

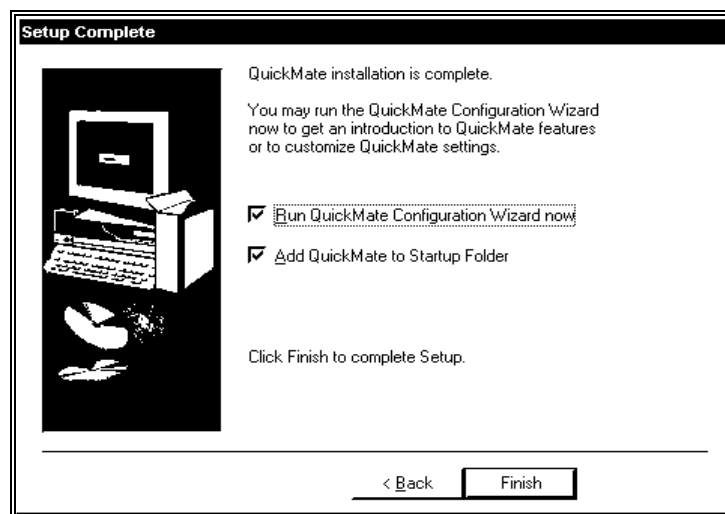


8. Select one of the options for preserving settings, and choose **Next** to continue installing QuickMate. A Start Copying Files dialog box will appear.



9. Follow the directions in the dialog box to continue installing QuickMate. A status box appears, telling you how much of the installation is complete.

**Note:** To cancel the installation, see “Canceling the Installation” earlier in this guide.



10. Run the QuickMate Global Configuration Wizard by following the directions on each screen. On the second screen in the wizard, you must select **Configure**. In the dialog box that appears, specify the UNIX host computer that you want to connect to QuickMate.

**Note:** If you do not configure a host computer, end users will not be able to use QuickMate.

### Installing QuickMate through the Add/Remove Programs applet

You may also install QuickMate using the Add/Remove Programs applet in Control Panel.

## Files Installed

The setup program installs or modifies the following files when you perform the Administrator Setup Installation.

**File type:** Shortcut

**Installation location:** Specified program folder (e.g., CX)

**File name:**

- QuickMate
- QuickMate Help
- QuickMate Global Configuration Wizard

**File type:** Executable.

**Installation location:** Specified network location (e.g., N:\QuickMate)

**File names:**

- qmate32.exe

**File type:** Setup

**Installation location:** Specified network location (e.g., N:\QuickMate)

**File names:**

- \_isdel.exe
- \_setup.dll
- layout.bin
- \_sys1.cab
- \_user1.cab
- data1.cab
- lang.dat
- os.dat
- \_inst32i.ex
- qmglobal.isu
- Data.tag

**File type:** Help

**Installation location:** Help subdirectory (e.g., N:\QuickMate\Help)

**File name:**

- \*.hlp

**File type:** Bitmap Icons

**Installation location:** Toolbar subdirectory (e.g., N:\QuickMate\Toolbar)

**File name:**

- \*.bmp

**File type:** Windows Initialization

**Installation location:** Specified network location (e.g., N:\QuickMate)

**File name:**

- qmglobal.ini

## Reinstalling QuickMate

To reinstall QuickMate files on the network, simply rerun the *setup.exe* program, which replaces all QuickMate files with the following exceptions:

- The QuickMate global configuration file (*qmglobal.ini*) is never overwritten

## UNIX Modifications for QuickMate Applications

### Network Configuration

If your institution already has a network running, no changes are required in the UNIX host system containing CX. If your institution does not have a network running, the network must be made to work with the UNIX host system. Therefore, you may need to make changes to the UNIX host system.

### Disabling a QuickMate Application

If you do not want a CX application to run on QuickMate, you can disable the application by modifying the file `$CARSPATH/system/etc/progtypes.s` in CX. The file lists the program names and types used by QuickMate, as follows:

ckrecon	BIN	CSERV
defaudit	BIN	CSERV
defrec	BIN	CSERV
docvoid	BIN	CSERV
forward	BIN	CSERV
glbalfwd	BIN	CSERV
glclsg	BIN	CSERV
sabalfwd	BIN	CSERV
sae	BIN	CSERV
sarc	BIN	CSERV
subbstat	BIN	CSERV

The program names represent the applications in CX. To disable a CX application in QuickMate, you must place a pound sign (#) in front of the program name.

**Note:** The system currently ignores the program type columns in the *progtypes.s* file. These columns are reserved for future use.





## SECTION 3 - PC INSTALLATION

### Overview

#### Introduction

This section provides information and procedures for end users to install QuickMate on their PCs. The various installation options for users are explained first, followed by the procedure to install QuickMate on their PCs. End users' first installation option is the type of installation, where the user has a choice of Networked Workstation or Stand-alone Workstation.

End users can install QuickMate on their PCs when they have appropriate access permissions to the network server containing QuickMate files.

#### QuickMate Icons

The following icons appear under the CX program group when you install QuickMate on your PC.



Executes QuickMate when QuickMate is not currently active.



Executes QuickMate Help.



Executes the QuickMate Configuration Wizard. The QuickMate Configuration Wizard allows you to customize your QuickMate settings.

#### Telnet Program

To run CX using QuickMate on your PC, you must run a Telnet program to login to the host system containing CX.

The Settings option in the QuickMate Control menu contains the **Helpers** option, which you can utilize to have QuickMate automatically launch a Telnet program when you start QuickMate. After you set up this feature, you can start QuickMate and the Telnet program in one action.

## Setting Up PCs

### Specifications for QuickMate

The following lists the requirements necessary for your institution to move to QuickMate.

#### PC

An IBM-compatible PC with the following processor specifications:

<b>Minimum:</b>	386 25 MHz
<b>Recommended:</b>	486 33 MHz or greater

#### Memory

The following Random Access Memory (RAM) configuration for the PC:

<b>Minimum:</b>	4 MB
<b>Recommended:</b>	8 MB

#### Hard-disk storage requirements

1 MB or greater of free disk space

#### Software

Microsoft Windows 3.1 and DOS 5.0 or higher

#### Network adapter card and TCP/IP

Any network adapter card with TCP/IP protocol and Microsoft Windows Sockets (WINSOCK.DLL) such as any of the following products:

- FTP Software PC/TCP® (version 2.2, 2.3, or 3.0)
- Microsoft TCP/IP-32® (version 3.11)
- Novell LAN WorkPlace® for DOS (version 4.1)

### Recommendations for PC Setup

Jenzabar makes the following recommendations for setting up PCs to reduce the number of variables that can cause unexpected problems with QuickMate.

1. When setting up Windows, use the Express Windows setup feature and accept the default settings. Custom modifications to the Windows setup may cause unexpected problems with QuickMate.
2. When setting up QuickMate, perform the installation using the *setup.exe* program which makes the appropriate settings.

### **Recommended Graphics Card**

You need a graphics card which has at least 16 colors in order to use QuickMate.

### **Terminal Emulation**

Your institution's network package provides a terminal emulator. If the terminal emulator works in CX character mode, the emulator will work in the GUI mode.

### **Pager Setting**

Set your pager setting to MORE.

### **TCP/IP Installations**

Jenzabar recommends that your PC supports at least six TCP connections to run the following:

- One Telnet connection
- QuickMate
- Four connections for active applications

**Note:** The last requirement is subjective. Your users need at least one active application to use QuickMate; however, as users become familiar with the GUI environment, they will want to use more and more applications at the same time. Four is a good starting number for connections.

## End User Installation Types

### Networked Workstation Installation

This option is for use by a network PC end user who has appropriate access permissions to the file server containing the QuickMate files. This option copies only those files to the user's PC that are necessary for the PC to run QuickMate from the network files.

#### Benefits:

- When updates occur on QuickMate, the institution only needs to update the files on the network file server.
- This option saves disk space on the user's PC.

**Note:** The user is completely dependent upon the file server to run QuickMate.

### Stand-Alone Workstation Installation

This option copies all files necessary to run QuickMate on the user's individual PC.

#### Benefit:

- Because this option places the QuickMate executable file on the PC's hard drive, the user is less dependent upon the file server to run QuickMate.

**Note:** When updates occur on QuickMate, the user must reinstall the files on his/her PC.

## **Startup Options**

### **Introduction**

When installing QuickMate on your PC, you have an option for automatic startup of the server when you start Windows. This option is automatically checked as a default in the Setup Complete dialog box. If you choose to change this option, you must manually start QuickMate by selecting QuickMate from the CX program group.

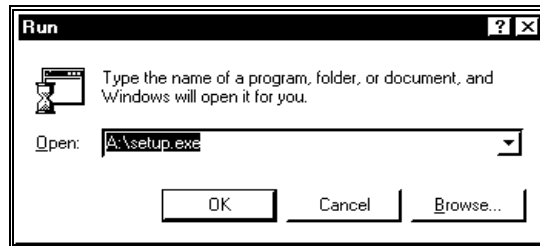
### **Add QuickMate to Startup folder**

This default option adds the QuickMate icon to the Startup folder. When you start Windows on your PC, Windows checks the Startup folder and automatically starts all programs contained in this folder. This option allows you to easily disable QuickMate from starting automatically by removing the QuickMate icon from the Startup folder.

## Installing QuickMate on a PC

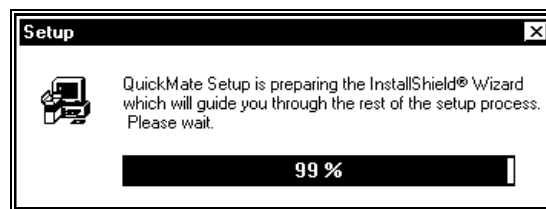
### How to Install on a PC

1. Open the Run dialog box from your Start menu.

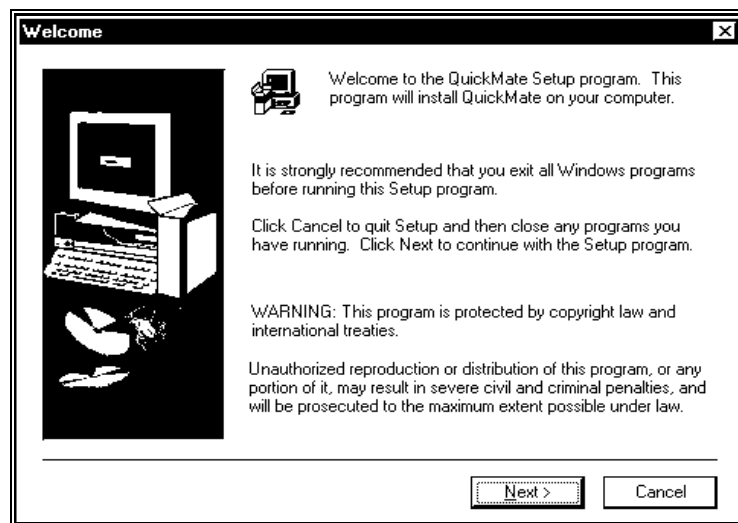


2. In the Run box on the command line, enter the path for the QuickMate setup program.
  - If you are installing QuickMate from a floppy diskette, insert the disk containing the QuickMate files in your PC's drive A (or B), and enter: **a:\setup** (or **b:\setup**).
  - If you are installing QuickMate from a file server, enter the network path and setup (e.g., **N:\QuickMate\setup**)

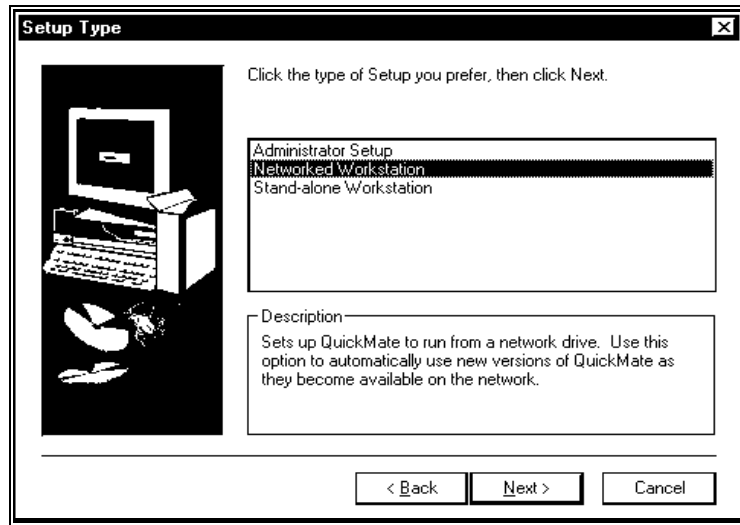
The following window appears asking you to wait.



3. The Welcome dialog box appears.



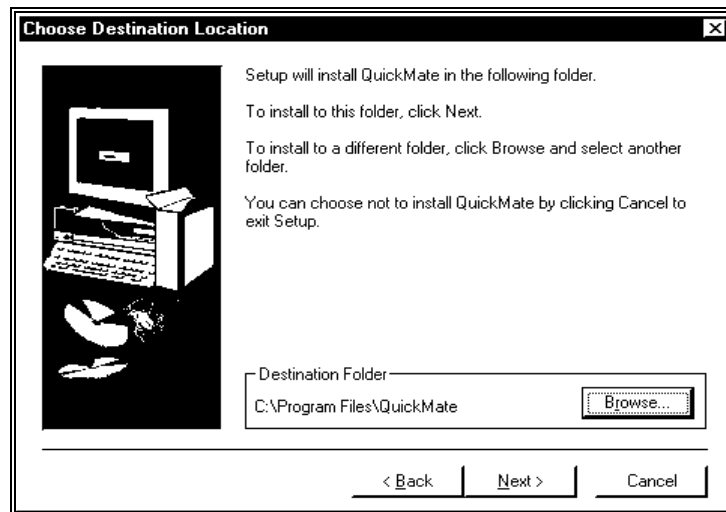
4. Follow the directions in the dialog box to continue installing QuickMate. The Setup Type dialog box appears.



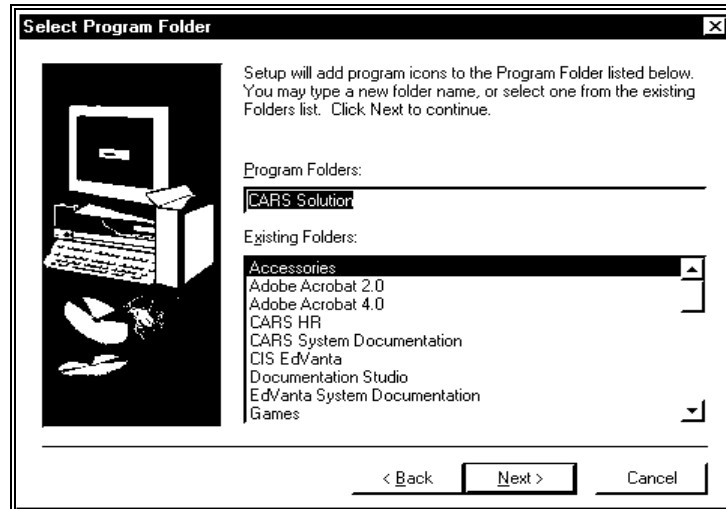
5. Choose either the Networked Workstation installation or the Stand-alone Workstation installation and select **Next**.

**Note:** Your institution's network administrator uses the "Administrator Setup" option, which is present for installing QuickMate on a network.

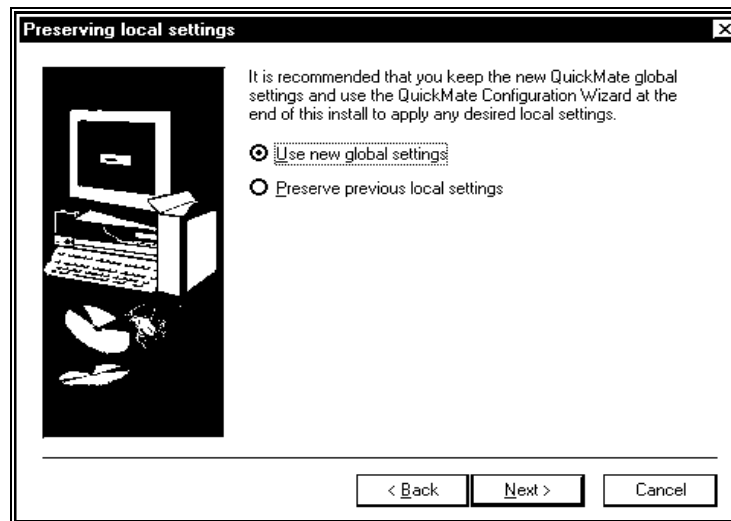
The Choose Destination Location dialog box appears.



6. Jenzabar recommends that you keep the default destination folder. Follow the directions in the dialog box to select another folder. Select **Next** to continue installing QuickMate. A Select Program Folder dialog box appears.

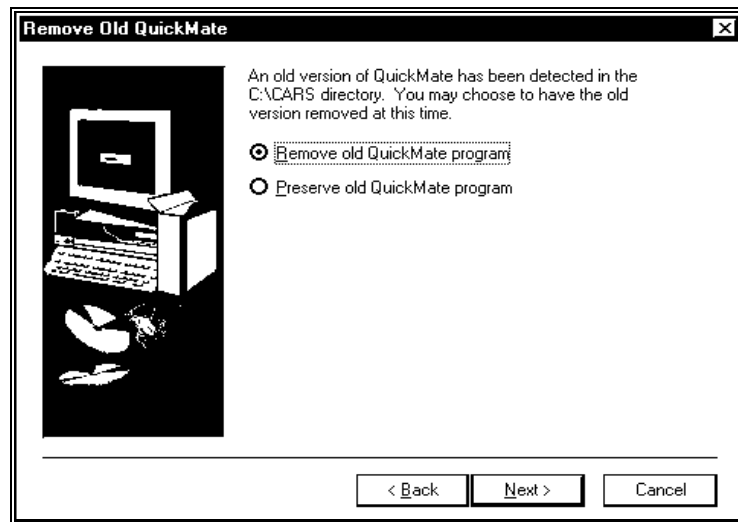


7. Select the program folder in which you want to install the QuickMate program files. Select **Next** to continue. A Preserving Local Settings dialog box appears.

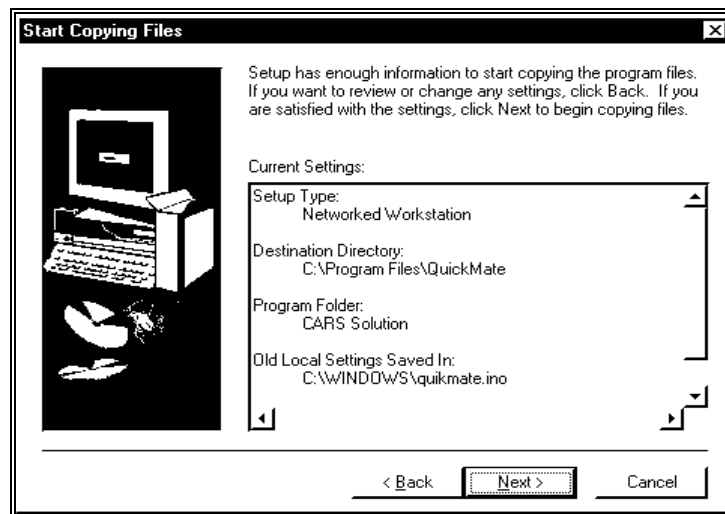


8. Choose one of the settings options and select **Next** to continue. If you already have an older version of QuickMate installed, the following Remove Old QuickMate dialog box will appear. (If you do not have QuickMate version 1.2 or older, the Start Copying Files dialog box will appear. Go to step 10.)

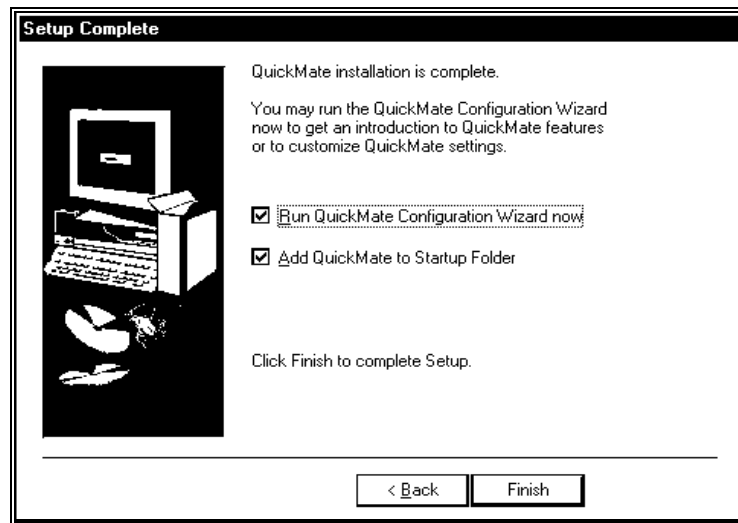




9. Choose to remove or preserve the old QuickMate program and select **Next** to continue. A Start Copying Files dialog box will appear.



10. Follow the directions in the dialog box to continue. A Setup Complete dialog box will appear.



11. If you do not want QuickMate to automatically start with Windows, click on the “Add QuickMate to Startup Folder” box so that it no longer displays a checkmark.
- Note:** If you do not choose this option, you will have to manually select QuickMate from the CX program group (or the other program group that you specified in the Select Program Folder dialog box).
12. If you do not want to run the QuickMate Configuration Wizard right now, click on the box next to “Run QuickMate Configuration Wizard now.” You will be able to access the wizard later through the CX program group.
13. Select **Finish** to complete the installation.
14. If you chose to run the Configuration Wizard now, a dialog box will appear guiding you through the Configuration Wizard. If you chose to finish the installation, QuickMate is ready to be run.

### Installing QuickMate through the Add/Remove Programs applet

You may also install QuickMate using the Add/Remove Programs applet in Control Panel.

### Networked Workstation Installation

If you performed an End User Workstation Installation, the setup program installs or modifies the following files:

**File type:** Shortcut

**Installation location:** Specified program folder (e.g., CX)

**File name:**

- QuickMate
- QuickMate Help
- QuickMate Configuration Wizard

## Stand-Alone Workstation Installation

If you performed an End User Stand-Alone Installation, the setup program installs or modifies the following files:

**File type:** Shortcut

**Installation location:** Specified program folder (e.g., CX)

**File name:**

- QuickMate
- QuickMate Help
- QuickMate Configuration Wizard

**File type:** Executable.

**Installation location:** Specified network location (e.g., N:\QuickMate)

**File names:**

- qmate32.exe

**File type:** Help

**Installation location:** Help subdirectory (e.g., N:\QuickMate\Help)

**File name:**

- \*.hlp

**File type:** Bitmap Icons

**Installation location:** Toolbar subdirectory (e.g., N:\QuickMate\Toolbar)

**File name:**

- \*.bmp

**File type:** Windows Initialization

**Installation location:** Specified network location (e.g., N:\QuickMate)

**File name:**

- qmglobal.ini

## Reinstalling QuickMate

To reinstall QuickMate files on your PC, simply rerun the *setup.exe* program. This will replace all QuickMate files.



# INDEX

## A

- access permissions, 5, 13, 16
- adapter card
  - network, 14
- Add/Remove programs
  - installing QuickMate, 9
- administrator setup installation, 3–11
- Administrator Setup installation
  - prior tasks, 5
- applications
  - disabling, 11
- audience, 1

## B

- before installing
  - Administrator Setup installation, 5
  - PC installation, 14
- before starting, 2–3
- bitmap icon files
  - Administrator Setup installation, 10
  - Stand-alone installation, 23

## C

- canceling
  - setup program, 3
- card
  - network adapter, 14
- changes to QuickMate
  - UNIX system, 11
- client/server, 1
- Command Line field, 6, 18
- Configuration Wizard, 13
- configurations
  - network, 5, 11
  - the host computer, 9

## D

- disabling
  - a QuickMate application, 11
- diskette installation, 6, 18

## E

- end users
  - installation, 13
- executable files
  - Administrator Setup installation, 10
  - Stand-alone installation, 23
- exiting
  - setup program, 2

## F

- file server, 5, 6, 18
- files
  - Administrator Setup installation, 10
  - Networked Workstation installation, 22
  - proctypes.s, 11
  - Stand-alone Workstation installation, 23
  - WINSOCK.DLL, 14
- FTP Software PC/TCP, 14

## G

- general tasks
  - before installing, 2
- getting started, 2–3
- Global Configuration Wizard
  - host computer configuration, 9
- graphical user interface, 1
- graphics card, 15
- gui. *See also* graphical user interface

## H

- hard disk requirements, 14
- help files
  - Administrator Setup installation, 10
  - Stand-alone installation, 23
- Helpers option, 13
- host computer configuration
  - Global Configuration Wizard, 9

## I

- icons, 13
- incomplete installation, 3
- installation
  - administrative setup, 3–11
  - diskette, 6, 18
  - incomplete, 3
  - network files installed, 10
  - Networked Workstation files installed, 22
  - PC, 18–22
  - prior tasks, 2
  - Stand-alone Workstation files installed, 23
  - TCP/IP, 15
  - through Add/Remove Programs, 9
  - user types, 16
- installing
  - QuickMate on a PC, 18–22

## J

- Jenzabarsupport agreement, 1

## M

- Microsoft TCP/IP-32, 14
- Microsoft Windows Sockets file, 14

MORE setting, 15

## N

network

- adapter card, 14
- configuration, 5, 11
- file server, 5

network supervisor, 5

Networked Workstation, 16

Novell LAN WorkPlace, 14

## O

options

- startup, 17

## P

pager setting, 15

PC

- setup, 14–15
- specifications, 14

PC installation, 18–22

PC setup

- recommendations, 14

permissions, 13, 16

- access, 5

prerequisite knowledge, 2–3

prior tasks

- Administrator Setup installation, 5

processor specifications, 14

Program Manager, 17

programs

- QuickMate setup, 2, 5, 6, 18
- Telnet, 13

progtypes.s file, 11

protocols

- TCP/IP, 14

## Q

QuickMate

- disabling an application, 11
- exiting, 3
- icons, 13
- installation diskette, 6, 18
- PC installation, 18–22
- reinstalling, 10, 23
- startup options, 17
- UNIX modifications, 11

QuickMate Control menu, 13

QuickMate setup program, 2, 5, 6, 18

- canceling, 3
- exiting, 2

## R

recommendations

graphics card, 15

PC setup, 14

reinstalling QuickMate, 10, 23

re-running

- setup program, 3

## S

setting up

- PCs, 14–15

Settings option, 13

setup files

- Administrator Setup installation, 10

setup program. *See also* QuickMate setup program

Shortcut files

- Networked Workstation installation, 10, 22, 23

software

- requirements, 14

specifications

- PCs, 14

Stand-alone Workstation, 16

startup options, 17

storage requirements, 14

support agreement, 1

## T

tasks

- prior to installing, 2

TCP/IP

- installations, 15
- protocol, 14

Telnet program, 13

terminal emulation, 15

types

- user installations, 16

## U

uninstalling

- QuickMate, 3

UNIX modifications

- for QuickMate, 11

## W

Windows

- starting QuickMate, 17

Windows initialization files

- Administrator Setup installation, 10
- Stand-alone installation, 23

WINSOCK.DLL. *See also* Microsoft Windows

Sockets file

wizard

- Configuration Wizard, 13
- Global Configuration wizard, 9