General Installation Notes

Important Information About ALERE®

ALERE is a mission critical application. It is strongly recommended that new releases be installed on a separate system where they can be tested BEFORE being released on a live system.

Windows XP or later is required to operate ALERE.

Visit the TIW website at **www.tiwcorp.com** and check for the existence of a *General Patch.* If one is available, download and apply it before using ALERE.

If you have any questions, TIW Technical Support would be happy to assist you. We may be reached at 610.258.5161 between the hours of 9 am and 6 pm ET, Monday through Friday, or by email at tech@tiwcorp.com

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PLEASE READ THESE INSTRUCTIONS IN THEIR ENTIRETY BEFORE INSTALLING

Included in this shipment:

ALERE® CD containing:

- README.RTF (last minute valuable information)
- ALERE Program files
- Runtime files
- Sample Company Data
- ALERE HTML Doc-On-Disk
- Developer's Source Kit and Manuals (If licensed)
- Activation Key and Serial Number located on the back of the CD case.

For new customers:

- Quick Start Guide

Managing ALERE's Program Files and Data

Starting with v11, each company's ALERE data files are housed in a single directory or Client Server Database.

DO NOT INSTALL ALERE OVER OLDER VERSIONS

New versions ALERE must always be installed into an empty directory.

When installing ALERE for the first time, place the program into a generic directory on the server named something like T:\ALERE. This will allow administrators to install upgrades by accepting the new directory name and changing the path to the server. **Always** test the installation first by utilizing the Sample Company data. We have found that mapped drive letters are faster and more reliable than UNC paths.

When upgrading, rename the old installation to \ALEREVxx and rename the new install (\ALERExx) to the original directory name (\ALERE). The startup properties on existing workstations will not need to be pointed to a new directory using this method.

After installation, start ALERE. Enter the Activation Key. The sample company will automatically be installed if the option was selected from the installation menu. If the option was not selected, the user will be taken to the **Open Company** screen, where you create companies.

We recommend creating a directory like T:\TIWDATA\ with a different subdirectory for each company if you have multiple companies.

Issues with installation for Windows 7 and newer computers.

If the path to the server cannot be selected on these computers, run SETUPLINK directly on the workstations.

SETUPLINK is automatically written to the server when the Installation Files are copied during installation. Alternatively, SETUPLINK may be run from the installation CD.

Updating from ALERE v11 and later:

1. Copy **wsalere.***, **wsaccess.***, **wscldusr.***, **ws_lingo.***, and **wslogins.*** to the new ALERE **sysfiles** directory.
2. If the ALERE installation has been modified, please follow the instructions outlined in the Installation and Migration of ALERE Modifications subsection to port the modifications to the new version.
3. The **TIW File Update** utility must be run for each company after migrating the data and modifications. (*File > System Tools > TIW FILE UPDATE*)
4. Ensure users have full administrator rights to the data and **sysfiles** directories.

Updating with CS Data

Copy the subdirectories with your databases' names to the new install.

Updating from ALERE Manufacturing v10 and Accounting 7.3 or earlier:

Before getting started:

- If utilizing both ALERE Accounting and Manufacturing, the data contained in the previously independent **wslogins** and **wsaccess** files will need to be **merged** (not copied.) **Ensure there are no duplicate records**. The **wslogins.*** and **wsaccess.*** files have been relocated to the **Sysfiles** directory.
- **wslogins.*.** This file contains ALERE's user logins. If utilizing both Accounting and Manufacturing, it is easier to copy from whichever package contains the most user logins and simply add any additional users as required. Note that user rights now apply to both Accounting and Manufacturing. Records may need to be edited on a user-by-user basis. These files may be merged. However, ALL user rights will need to be reviewed and updated. Within the table is a memo field PWCANDO containing exceptions to the basic right. If a user has limited rights, it is possible to manually merge the data in this field for users with access to both Accounting and Manufacturing directly in the database.
- **wsaccess.*.** This file limits what companies users may access. It is best to simply copy the table which contains the most information. Afterward, edit and append the user permissions as necessary. Note that this table will be blank if there is only one company or if all users can access all companies.

Create new companies when migrating from older versions:

When migrating from versions prior to v11, it is **REQUIRED** to manually create new companies as numerous data structures have changed as of v11.

1. Open the existing ALERE Accounting and/or ALERE Manufacturing **Company Defaults** screens to serve as a reference.
2. Open the ALERE program and navigate to *File > Open Company*.
3. Click "New" to display the New Company screen on the Open **Company** screen.
4. Check the boxes for importing ALERE Accounting and/or Manufacturing data.
5. Enter the paths to the Accounting and Manufacturing company data which are being migrated.
6. Enter the company name and a new company data path. **THE DATA PATH MUST NOT BE THE SAME AS THE OLD ONE.** A LAN or Client Server company may be created by selecting the appropriate database type. If desired, a CS company may be created from a LAN company at this stage. (Running with Client Server data requires installing Microsoft SQL Server before setting up the companies.)
7. Press the "Continue" button.
8. Enter the company setup information, referencing the previous installations.
9. Click "Save" then "Exit." The **File Update** screen will be displayed. Run the utility for "All Tables."

10. Repeat for additional companies. Each company must have its own data directory or, for CS installations, its own database. If linking ALERE Mfg to other accounting packages, the ALERE data MUST reside in a different data directory or database than the linked accounting package.
11. If the ALERE installation has been modified, please follow the instructions outlined in the Installation and Migration of ALERE Modifications subsection to port the modifications to the new version.
12. Ensure users have full administrative rights to the data and **sysfiles** directories.

Installation and Migration of ALERE Modifications

Notes before beginning the process:

If migrating modifications from version Manufacturing v10, Accounting v7.3, or earlier

- ALERE versions after Accounting v7.3 and Manufacturing v10 have changed the size of almost every screen. Review all screen modifications and adjust to fit the new screen size.
- Data from the older versions of **usrtable.* and usrpaswd.*** must be appended into the current tables. **Do not replace these files.**
- Append the records from the newly created **ws_lingo** for TYPE = "Ribbon." Copy to the new ALERE installations **Sysfiles** directory.

If migrating modifications from v12 or earlier:

- Please note that as of ALERE v12, the fields "Street 1" and "Street 2" have been merged into a single memo field.
- Any screens or reports which have been modified and utilized this information must be updated.

If migrating modifications from v14 or earlier:

- Any screens or reports that have a tax field need to be updated due to the tax changing from a logical field to a character field.

Setup and Installation of Modifications

If ALERE has been modified, it is very important to install and test modifications on either the sample company or a test company prior to using them in a live company.

All modifications, custom programs, and reports should be placed in a "MODS" directory directly under the new ALERE root directory.

1) Create a "MODS" directory in the root of the new ALERE installation.
2) Open the new installation of ALERE, select the test or sample company, and navigate to *File > Maintenance > Company Defaults > Default Paths* and ensure the path to the "MODS" folder is correctly defined for each company.
3) Copy all custom programs, VAR files, and/or reports from the old ALERE installation to the new "MODS" directory.
4) If the ALERE installation has modifications that include the change of field size, or other modifications to any system file, **copy** the following tables to the new **sysfiles** directory: **usrdata.***, **usrffdef.***, **usrindex.***, **usrmap.***, **usrtable.***, and **usrribbn.*.**
5) **Append** existing data to **usrpaswd.*** do not copy!
6) If modifications included changes to **wshooks.dbf:**
   a) Open the table, delete any records which do not pertain to the modifications, and copy the file to the new **sysfiles** directory.
7) It is good practice to place copies of the current USR files in this directory or a subdirectory.
8) **TIW File Update** must be run for each company after installation of the modifications. (*File> System Tools> TIW FILE UPDATE*)

9) Consult the Developers Kit readme files for additional information on what areas of the product have changed.
10) **Carefully test all modifications before moving them into the live company within ALERE.**

Special Note Regarding Runtime files:

ALERE requires specific Runtime, OCX & DLL files to operate. When upgrading from a version earlier than ALERE v11, select the option to install the Runtime during installation. All workstations must be updated. Ensure you are logged in as the local administrator for Windows or as the network administrator on the server when installing or upgrading ALERE.

Special Note Regarding Runtime files for Manufacturing linked to Pro Series:

ALERE requires specific Runtime, OCX, and DLL files to operate. If Pro Series runtime files are installed, replacing them with the same named files from ALERE will be necessary. Pro Series will run on ALEREs runtime, but ALERE cannot run on Pro Series runtime. The specific files in question are VFP9R.DLL and VFD9RENU.DLL. Perform a search for these files on each workstation. DELETE all the copies found, and COPY the same files from the ALERE CD to the SAME locations.

Special note for Remote Desktop/ Terminal Server Installations:

It is no longer necessary to have a separate TIWRUN directory for each user. Simply point all users' shortcuts to the same TIWRUN directory on the terminal server. Note that on a traditional network, the TIWRUN directory should still reside on the local drive so that users can access the manual.

HTML Manual Installation: This should be completed and TESTED on ALL workstations!

A Microsoft Security rule sometimes prevents .chm (compiled HTML files) from being viewed when loaded from a network drive or remote server.

Note: The manual must be on the local drive!

If the HTML manual cannot be viewed when the "?" button on a screen is selected, then follow these instructions:

1. Start the program and go to *File > Maintenance > Company Defaults > Options.*
2. Select the Use "HTML Help" and "HTML Manual on Workstations" options.
3. Save the change, exit the screen, and restart ALERE. The workstation will automatically download the manual from the server for local use. Thereafter, the manual will automatically be updated whenever the manual on the server is updated, and ALERE is opened on the workstation.
4. Start the manual directly from a desktop shortcut. When the run dialogue appears, uncheck "Always ask before opening this file" and select "Open" or "Unblock" to view the file.
5. Verify that the contents and index are shown on the left side of the screen. If they are not displayed, click the "Show" button at the top left of the screen. If the screen does not contain that button, hover the cursor over the bar just inside the left edge of the screen and drag to the right.

The Help Manual should work from the desktop shortcut or within ALERE.

The Help Manual is periodically updated on our website. Please sign up for TIW's notification service list to receive an email when a new version of the manual is available. When notified, download the new manual from the TIW website and place it in the ALERE directory on the server. The updated manual will automatically be distributed to workstations when ALERE is started.