

Network Administrator's Installation Guide

EZ-CARE2

SofterWare, Inc.
EZ-CARE2 Version 7
January 2010

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About This Guide

This guide provides information on recommended network configurations of EZ-CARE2 for different network environments.

Many factors can affect network performance, and although we attempt to cover as many areas as possible in this document, there may be specific elements within your network affecting configuration that are not addressed here.

You may find other useful information in our [Additional References](#) section at the end, which contains links to various reference manuals and websites.

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LAN Installation

The standard LAN installation has two requirements:

- **The Sharing and Security setup for the folder that will contain EZ-CARE2.** When using a LAN, this setup must be done at the server. For Peer to Peer networks see that alternate network setup below.
- **The Installation of EZ-CARE2 onto the server from a workstation.** If you choose to use the server as a workstation you will need to install EZ-CARE2 from the server before you install a workstation.

To implement this approach, follow the steps below.

Identify Server

Identify the server or the folder on the server where you intend to install the program. Because you will need to share this folder and all its subfolders (see below), we recommend that you create a separate folder on the server (for example, **C:\SOFTER**) into which you will install EZ-CARE2 and any other SofterWare products to be accessed by the same users. You can then share this folder with EZ-CARE2 users while restricting access to other folders on the server.



Note: *Novell systems must be Version 3.0 NetWare or higher and must be set to use long file names.* You must set up a volume on the server upon installation allowing you to create shares within the volume. Also, Novell settings should be adjusted if necessary so that Record Locks are set at 2000 and File Locks at 1000. For other Novell-specific information, please consult your Novell user's manual or our [Additional references](#).

Sharing and Security

You will need to fully share the EZ-CARE2 folder and all its subfolders with all users expected to access the folder. The instructions below explain the options.



Note: Windows 95, Windows 98, Windows ME and Windows NT are no longer supported.

Sharing and Security under Windows 2003 or 2008 Server

If you are running Windows 2008 Server or Windows 2003 Server, require sharing and security setup so that your users can access EZ-CARE2 on your network.

Right-click on the folder to be shared, click on **Sharing and Security**, then **Share this folder**; the default name is the folder name, which you can accept or change.

1. Next, click the **Permissions** button. It should be set to the default of **Everyone** with Full Control.
2. If you want to limit access to the folder to specified users, click on the **Security** tab, remove **Everyone**, and add specified users/groups, making sure they have **Full Control**. You can also restrict user access *after installation* to specific parts of EZ-CARE2 using the Users, Groups and Security features within EZ-CARE2 Office Administration.
3. On the Security tab, do NOT check the **Allow inheritable permissions from parent to propagate to this object** check box. Otherwise, changes in security to higher-level folders could affect the EZ-CARE2 folder.
4. Click on the **Advanced** button. You'll see the Allow inheritable permissions from parent to propagate to this object box again; leave it unchecked. Then, CHECK the Reset permissions on all child objects and enable propagation of inheritable permissions box. This updates any previous file-level restrictions.

Sharing and Security under Windows 2000 Server

If you are running Windows 2000 Server, the first few steps are the similar (to those above) – right-clicking on the folder, sharing it, clicking the Permissions button and confirming the default of “Everyone” with Full Control.

1. As with Windows NT, if you want to limit access to the folder to specified users, click on the **Security** tab, remove **Everyone**, and add specified users/groups, making sure they have **Full Control**. You can also restrict user access *after installation* to specific parts of EZ-CARE2 using the Users, Groups and Security features within EZ-CARE2 Office Administration.
2. On the Security tab, do NOT check the **Allow inheritable permissions from parent to propagate to this object** check box. Otherwise, changes in security to higher-level folders could affect the EZ-CARE2 folder.
3. Click on the Advanced button. You'll see the Allow inheritable permissions from parent to propagate to this object box again; leave it unchecked. Then, CHECK the Reset permissions on all child objects and enable propagation of inheritable permissions box. This updates any previous file-level restrictions.

For further details on Sharing & Security or on setting up users and groups, please consult your user's manual, or use the links mentioned in [Additional References](#).

Map Folders

If your network allows you to create user logon scripts, map the folder where you will install EZ-CARE2 as a network drive and include it in the logon scripts of all users expected to access the system.

Example: the **C:\SOFTER** folder on the server could be mapped as the **F:** network drive. If you network does not allow you to create logon scripts, you'll have to map the drive when carrying out the workstation install.



Tip: We suggest you use **F:** as the mapped network drive letter. This allows you to accept the default network drive for EZ-CARE2 data shown in the workstation install. If you choose to use a different drive letter, modify the workstation install accordingly.

Complete Installation

1. Disable any virus scanning software that might interfere with the install.
2. Log on to the network from a workstation as network administrator, having full rights to the network drive where EZ-CARE2 is being installed. Without this, some controls may not be properly registered, causing program malfunctions.
3. Download the Server installation program for EZ-CARE2:
 - a. Use the link that was emailed to you by SofterWare to access the “Installing and Getting Started with EZ-CARE2” website that has been set up for you.

- b. Log in to the website using your email address and the Client ID that was provided to you in the same email.
 - c. Download the Server installation program for EZ-CARE2 to your computer.
4. Run the Server installation program and follow the instructions on the screen.

In most cases, you will change the default drive and path of **C:\SOFTER\EZCARE2** to the network drive letter and/or folder where you plan to install the application on the server. For example, **F:\SOFTER\EZCARE2**.

5. Once you have selected the drive, proceed with the install. When it is complete, proceed to the next section, [Registering Your Program](#).
6. Once you are done with registration, proceed to the section on [LAN - workstation install](#)

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Registering Your Program

After you have completed the installation, locate and run the **ez2.exe** on the server, peer-to-peer computer where you have done a system install or workstation in a peer-to-peer environment.

You will need to register your program in order to start using it. You have the option to register in two ways:

- Click the **Click here to obtain # from web site** button. You can then go to the SofterWare Web site, where you can follow the instructions on screen to obtain your registration number.
- Call SofterWare support to obtain your registration key. The support representative will walk you through the registration process.



Warning! The registration code is generated each time you open the system until it is registered. If you close and then reopen the system before typing in the code, the registration will not be successful.

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LAN - Workstation Install

1. Log onto the workstation with *administrative rights*, as defined by which operating system is running *at the workstation*:
 - Windows Vista, Windows XP – you must log on as **Network Administrator** in order to update the system files on the workstation.

- Citrix Client, Terminal Services – you must log on with the user name “Administrator”. Open the Windows Control Panel and start “Add and Remove Programs”.
2. If you haven't mapped the network drive yet for EZ-CARE2, do so now. Browse to the folder on your network where you placed the EZ-CARE2 System. Map this folder as a drive, being sure to check the box for “Reconnect at Logon.”
 3. Disable any virus scanning software that might interfere with the installation process.



Warning! During installation, EZ-CARE2 will set **C:\temp** as the temp folder. If you remove this definition of the temp folder or change it to a folder name with blank spaces, this will cause program malfunctions.

4. Download the Server installation program for EZ-CARE2:
 - a. Use the link that was emailed to you by SofterWare to access the “Installing and Getting Started with EZ-CARE2” website that has been set up for you.
 - b. Log in to the website using your email address and the Client ID that was provided to you in the same email.
 - c. Download the Server installation program for EZ-CARE2 to your computer.
5. Run the Server installation program and follow the instructions on the screen.
 - a. It will create **C:\SOFTER\EZCARE2** on the workstation, place the necessary .dlls and other Windows files needed to run EZ-CARE2 on your workstation, and create a shortcut on the desktop (if desired).
 - b. When asked, “Where is your EZ-CARE2 data stored on the network?”, either accept the default of **F:\SOFTER\EZCARE2** if it matches the network drive and folder for EZ-CARE2 System data, or browse to the applicable mapped drive and folder.



Warning! If your network drive **IS** the EZ-CARE2 folder (for example, **F:\SOFTER\EZCARE2** on the server is mapped as drive **F:** on the workstation), then set the data path to be **F:** ; otherwise, the path will go down too many levels and you will get the message saying the folder does not exist.

Also, note that **C:\SOFTER\EZCARE2** on the workstation should NOT have **\program** or **\data** folders. Those belong **ONLY** on the server.

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Peer-to-Peer Installation



Note: Windows 95, Windows 98, Windows ME and Windows NT are no longer supported.

Identify Folder Location

1. Log on with **administrative rights** to the computer where you intend to install the EZ-CARE2 system.
 - For Windows Vista, Windows XP, and Windows 2000, you must log onto the computer as Administrator or as a user with the rights of an Administrator. Only when you log onto the computer with the user name Administrator are you assured to have the EZ-CARE2 desktop short cut and EZ-CARE2 menu available to all who log onto the computer with their own user name and password.
 - *Windows 95, 98, and ME* is not supported by Microsoft and it is strongly suggested that you do not use them on your network. These versions of windows compromise the security of your information and have known problems you can review on the Microsoft website. These versions of windows also give administrative rights to everyone who logs onto the PC; therefore, an administrator's password is not needed to access all the unprotected the files on a computer running these versions.
2. Set up the folder where you will install the system – we recommend that you create a folder called **C:\SOFTER** and then place EZ-CARE2 and any other SofterWare products to be accessed by the same users within this folder.

Sharing and Security

You will need to fully share the EZ-CARE2 folder and all its subfolders with all users expected to access the folder.

Later on, you can still restrict user access to specific parts of EZ-CARE2 using the Users, Groups and Security features within EZ-CARE2 Office Administration.

Sharing and Security in Windows Vista

► To set up sharing and security in Windows Vista:

1. Right-click on the folder to be shared, click on **Sharing...**, then choose “Everyone” in the pick list of names. You will need to click on the down-arrow to the option “Everyone”.
2. After choosing “Everyone” click on the **Add** button.
3. Click on Share to complete this step and make the folder available to everyone.

Sharing and Security in Windows XP Professional

- ▶ To set up sharing and security in Windows XP Professional:
 1. Right-click on the folder to be shared, click on **Sharing and Security**, then click the **Share** tab. Select **Share as**; the default name is the folder name, which you can accept or change.
 2. Next, click the **Permissions** button, and accept the default of **Everyone** with Full Control.
 3. If you want to limit access to the folder to specified users, click on the **Security** tab, remove **Everyone** and add specified users/groups, making sure they have Full Control. You can also restrict user access *after installation* to specific parts of EZ-CARE2 using the Users, Groups and Security features within EZ-CARE2 Office Administration.
 4. In the Security tab, click **Advanced**, then UNCHECK the box for **Inherit from parent the permission entries that apply to child objects**. Include these with entries explicitly defined here.
 5. Also in Security, CHECK the box for **Replace permission entries on all child objects with entries shown here that apply to child objects**.

Sharing and Security in Windows 2000 Professional

- ▶ To set up sharing and security in Windows 2000 Professional, take these steps:
 1. Right-click on the folder to be shared, click on **Sharing**, then **Share as**; the default name is the folder name, which you can accept or change.
 2. Next, click the **Permissions** button, and accept the default of **Everyone** with Full Control.
 3. As with Windows NT, if you want to limit access to the folder to specified users, click on the **Security** tab, remove **Everyone** and add specified users/groups, making sure they have Full Control. You can also restrict user access *after installation* to specific parts of EZ-CARE2 using the Users, Groups and Security features within EZ-CARE2 Office Administration.
 4. In the Security tab, make sure **NOT** to check the box for **Allow inheritable permissions from parent to propagate to this object**. Otherwise, changes in security to higher-level folders could affect the EZ-CARE2 folder.
 5. Click on the Advanced button. You'll see the **Allow inheritable permissions ...** box again: leave it unchecked. Then CHECK the box for **Reset permissions on all child objects and enable propagation of inheritable permissions**. This will update any previous file-level restrictions.

For further details on Sharing and Security or on setting up users and groups, please consult your User's Manual, or use the links mentioned in [Additional References](#).

Complete the Server Installation

► To complete the server installation

1. Disable any virus scanning software that might interfere with the install.
2. Download the Server installation program for EZ-CARE2:
 - a. Use the link that was emailed to you by SofterWare to access the “Installing and Getting Started with EZ-CARE2” website that has been set up for you.
 - b. Log in to the website using your email address and the Client ID that was provided to you in the same email.
 - c. Download the Server installation program for EZ-CARE2 to your computer.
3. Run the Server installation program and follow the instructions on the screen.
4. When asked if you want to place an icon on your desktop, be sure to say YES.
5. You can proceed to [Registration](#) now, or after any workstation install.

Peer-to-Peer Workstation Install

1. Log on with *administrative rights* on the workstation.



Note: For Windows Vista, Windows XP, Windows 2000 Pro and Windows NT workstation you must log onto the workstation as Administrator or as a user with the rights of an Administrator.

2. Browse to the folder on your network where you placed the EZ-CARE2 System data.
3. Map this folder as a drive, being sure to check the box for **Reconnect at Logon**.
4. Disable any virus scanning software that might interfere with the install.
5. Download the Workstation installation program for EZ-CARE2:
 - a. Use the link that was emailed to you by SofterWare to access the “Installing and Getting Started with EZ-CARE2” website that has been set up for you.
 - b. Log in to the website using your email address and the Client ID that was provided to you in the same email.
 - c. Download the Workstation installation program for EZ-CARE2 to your computer.
6. Run the Workstation installation program and follow the instructions on the screen. It will create **C:\SOFTER\EZCARE2** on the workstation, place the necessary .dlls and other Windows files needed to run EZ-CARE2 on your workstation, and create a shortcut on the desktop (if desired).



Note: During installation, EZ-CARE2 will set C:\TEMP as the temp folder. If you remove this definition of the temp folder or change it to a folder name with blank spaces, this will cause program malfunctions.

7. When asked where data is stored, either accept the default of **F:\SOFTER\EZCARE2** if it matches the path to the EZ-CARE2 data folder in the network drive you've created, or browse to select the correct drive and folder for the data path.

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Citrix\Terminal Server Installation

If you are on a Wide Area Network that is running Terminal Server or Citrix, you can run EZ-CARE2 from the server.

1. Do ONE of the following:
 - If you are using Terminal Server 2003, from Add/Remove Programs, run the EZ-CARE2 System install. Be sure to **Install this application for all users** when it asks.
 - If you are using Terminal Server 2008, Put the server in install mode (run "change user\install") and do an EZ-CARE2 System install.

After taking these steps, the software should be available at all sites using Citrix or Terminal Server to access applications.

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Installing SofterWare Accounting

SofterWare Accounting can be installed in two different ways:

- As a single user installation on a single computer.
- As a client/server installation on a server and a number of networked workstations.

Single User Installation

The single user installation allows you to keep the accounting information secured on a single user's computer. Other users will not be able to access the account information.

You can do a single user installation on a standalone system, or on a workstation that is part of a LAN installation.

► **To install SofterWare Accounting on a single computer**

1. Complete installation and registration of EZ-CARE2.

2. Download the installation program for SofterWare Accounting
 - a. Use the link that was emailed to you by SofterWare to access the “Installing and Getting Started with EZ-CARE2” website that has been set up for you.
 - b. Log in to the website using your email address and the Client ID that was provided to you in the same email.
 - c. Download the Accounting Server installation program for EZ-CARE2 to your computer.
3. Run the Accounting Server installation program and follow the instructions on the screen.

LAN Installation

A LAN installation of SofterWare Accounting is intended to work with a LAN installation of EZ-CARE2. You do a server installation at the same network location that you installed EZ-CARE2 at, and then do workstation installs on those workstations that you want to be able to access the account information.

Server Installation

► **To install SofterWare Accounting on a server as part of a LAN installation**

1. Complete installation and registration of EZ-CARE2.
2. Disable any virus scanning software that might interfere with the install.
3. Log on to the network from a workstation as network administrator, having full rights to the network drive where EZ-CARE2 is installed. Without this, some controls may not be properly registered, causing program malfunctions.
4. Download the Server installation program for SofterWare Accounting:
 - a. Use the link that was emailed to you by SofterWare to access the “Installing and Getting Started with EZ-CARE2” website that has been set up for you.
 - b. Log in to the website using your email address and the Client ID that was provided to you in the same email.
 - c. Download the Accounting Server installation program for EZ-CARE2 to your computer.
5. Run the Accounting Server installation program and follow the instructions on the screen.



Note: We recommend that you install SofterWare Accounting into the same folder as EZ-CARE2.

Workstation Installation

- ▶ To install SofterWare Accounting on a workstation as part of a LAN installation
 1. Complete installation and registration of EZ-CARE2.
 2. Disable any virus scanning software that might interfere with the install.
 3. Download the Workstation installation program for SofterWare Accounting:
 - a. Use the link that was emailed to you by SofterWare to access the “Installing and Getting Started with EZ-CARE2” website that has been set up for you.
 - b. Log in to the website using your email address and the Client ID that was provided to you in the same email.
 - c. Download the Accounting Workstation installation program for EZ-CARE2 to your computer.
 4. Run the Accounting Workstation installation program and follow the instructions on the screen.

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Update Procedures

LAN or Peer-to-Peer

Server Install



Note: In this section, “server” means the location where you did an EZ-CARE2 System install, and where EZ-CARE2 data is stored. On a LAN this will be on a server; in a Peer-to-Peer setup, it will be on the PC where you did a System installation.

- ▶ To perform a server installation update on LAN or peer-to-peer
 1. **Back up all EZ-CARE2 data** as a preventative measure in case there are interruptions or other malfunctions during the update process that cause data corruption. All users should be out of the EZ-CARE2 system when you run the backup.
 2. After the backup is completed, check again before performing the update to make sure all users are still out of the EZ-CARE2 system.
 3. Log on from a workstation as network Administrator (on a network) or Administrator (peer-to-peer), having full rights to the folder or network drive where EZ-CARE2 is installed and the update will be installed. Without this, some controls may not be properly registered, causing program malfunctions. For more details on administrative rights in a peer-to-peer setup, , [click here](#).
 4. Also, be sure that any virus scanning software is disabled.
 5. Download the update installation program:

- a. Use the link that was emailed to you by SofterWare to access the "Installing and Getting Started with EZ-CARE2" website that has been set up for you.
 - b. Log in to the website using your email address and the Client ID that was provided to you in the same email.
 - c. Select the update you need, and download it to the **EZCARE2\Updates** folder on the server. Note the name or version of the update file.
6. Run the update and follow the instructions to install it in the folder where your EZ-CARE2 program is located on the server.
 7. After the update has finished installing, launch the EZ-CARE2 System on the server to update the data, and to make sure that the new version is running properly.

Workstation Install

When users open EZ-CARE2 at their workstations, they will get the prompt:

```
=====
The version of EZ-CARE2 on your workstation does not match the data you
are accessing. Would you like to update?
=====
```

If the workstation is running Windows Vista, Windows XP, Windows 2000 Pro and Windows NT workstation, you must have logged on as administrator of your network. Once you have logged on, click **Yes** in response to this screen.

Take whatever login steps are needed depending on the operating system at the workstation, then click the "Yes" button, and the application will launch the workstation update program from the server.

Citrix/Terminal Server

1. First, log into the server as network administrator via Citrix or Terminal Services.
2. Download the update installation program:
 - a. Use the link that was emailed to you by SofterWare to access the "Installing and Getting Started with EZ-CARE2" website that has been set up for you.
 - b. Log in to the website using your email address and the Client ID that was provided to you in the same email.
 - c. Select the update you need, and download it to the **EZCARE2\Updates** folder on the server. Note the name or version of the update file.
3. Next, on the Citrix/Terminal Server, do ONE of the following:
 - From Add/Remove Programs, run the EZ-CARE2 update installation program that you've downloaded from SofterWare's Web site. When prompted, be sure to **Install this application for all users**.



Note: When you open Add/Remove Programs, it appears that you only have two options, a CD install and a Windows update. If you are updating with a downloaded file, choose to install from a CD. You will receive an error message telling you there is no CD, but you can then browse to the location of the downloaded file.

- Put the server in install mode (run “change user\install”) and do an EZ-CARE2 System update.

The first approach is preferred but may not be available on earlier versions of MetaFrame and WinFrame.

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Additional References

For additional information on Novell network administration, try the following web site:

<http://www.novell.com/documentation/netware.html>

For information specific to Windows 2000, try the following web site:

<http://microsoft.com/windows2000/techinfo/proddoc/>

For information, specific to NT Server, try the following web site:

<http://microsoft.com/ntserver/default.asp>

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