

Quick Start Guide

ALERE[®]
Business Applications





Quick Start Guide

Contents

| | |
|--|-----------|
| System Requirements..... | 3 |
| Installation..... | 4 |
| Remote PCs (Workstations)..... | 5 |
| Installing New Versions | 6 |
| New Directory vs Overwriting Existing Directory..... | 6 |
| Bringing Forward Modifications | 7 |
| Installing the HTML Manual on each Workstation | 7 |
| Starting the Software for the First Time | 8 |
| Adding New Companies..... | 9 |
| Before You Begin | 9 |
| Adding a New LAN Company | 10 |
| SQL Installation..... | 11 |
| Converting LAN Data to SQL | 11 |
| Adding a New SQL Data Source | 12 |
| Adding New SQL Companies..... | 12 |
| Basic Accounting Implementation Steps | 13 |
| Basic Manufacturing Implementation Steps..... | 14 |
| Technical Support..... | 14 |
| Guidelines for Reporting an Issue..... | 14 |
| Scope of Technical Support | 15 |
| Factory Training..... | 15 |



Quick Start Guide

| | |
|------------------------------------|----|
| Technical Seminar..... | 15 |
| Developer’s Seminar..... | 15 |
| Custom Consulting/Training | 16 |
| Web Based Technical Training | 16 |



Quick Start Guide

System Requirements

To use ALERE[®] Business Applications, you must have a computer that meets (or exceeds) the following requirements:

- IBM[®] compatible PC operating at 1 GHz or higher (2 GHz or better recommended)
- 1 GB of RAM (more is recommended)
- 100 Mbps or higher network connection (1 Gbps recommended)
- 250 MB available disk space on the local drive for stand-alone or server installation to provide space for programs and data
- 50 MB available disk space on the workstation drive for Runtime files and temp files
- CD-ROM drive
- Microsoft[®] Windows[®] XP, Vista, Windows 7, 8, or 10
- 1024 x 768 or higher resolution is required
- Any Windows[®] compatible printer to print reports

Note Running ALERE[®] Business Applications client/server requires Microsoft SQL Server 2000 or newer and a matching number of user licenses. See the Microsoft web site for SQL Server system requirements.

Note ALERE[®] LAN should be installed on the server with disk caching and opportunistic file locking (SMB2/SMB3) turned off. This is not required if all users are connected via RDP, and the ALERE[®] program and data are on the Terminal Server computer, or if the companies are all set up in Client Server.



Quick Start Guide

The installation of ALERE[®] Business Applications LAN or client/server version is performed with the same CD and follows the same steps. To install ALERE[®] Business Applications software

- 1 Read the Software License Agreement.
- 2 Have on hand the Activation Key sent with the software. If you do not have the Activation Key, call 610.258.5161.
- 3 Close all open applications.
- 4 Disk caching should be disabled and virus scanning software should exempt the folders where the program and data will reside.
- 5 Insert the ALERE[®] Business Applications CD-ROM into the CD-ROM drive. The installation program will start automatically.
- 6 Follow the on-screen instructions as they appear.

Installation

- 1 On the “Welcome” screen select the **Next** button to continue the install.
- 2 Check the radio button marked “I accept the agreement” and then the **Next** button to continue.
- 3 On the *Select Components* screen, select the type of installation from the pull-down box that is showing “Single User Installation”. The options are Single user, Multiuser Server, Multiuser Workstation, or Custom. The appropriate options will be automatically checked in the box below. Select the **Next** button.

Note Installation of ALERE[®] on a LAN or Client/Server network requires a single server PC and one or more remote PCs (workstations). You must install this software on the server PC first; then it can be installed on the remote PC(s).

Note It is suggested that the program be installed in a generic “ALERE” directory.

- 4 Select the **Next** button.



Quick Start Guide

- 5 Accept the directory in which to install the Runtime files or specify another. Select the **Next** button. Note that on a traditional network these files must reside on the local workstation.
- 6 Select the desired additional tasks and then select the **Next** button.
- 7 Select the **Install** button to start the installer. A progress bar displays the status of the installation process. When the process is complete, select the **Finish** button.
- 8 Remove the CD-ROM from the drive and restart the computer. You are now ready to start ALERE[®] Business Applications.

Remote PCs (Workstations)

Note Setup may be run from the CD or by selecting the SETUPMU.EXE program from the server.

- 1 Set the choice to “Multiuser Workstation” and select the **Next** button.
- 2 Check all the options and select the **Next** button.
- 3 Specify the path and directory on the LAN administrator PC where the program files reside. Select the **Next** button.
- 4 Accept the directory in which to install the Runtime files or specify another. These files need to be on your local drive. Select the **Next** button.
- 5 Accept the desired additional tasks and select the **Next** button.
- 6 A progress bar displays the status of the installation process. When the process is complete, select the **Ok** button.
- 7 Remove the CD-ROM from the drive and restart the computer.
- 8 Repeat this process for each workstation. You are ready to start the program.



Quick Start Guide

Installing New Versions

All software evolves and that holds true for ALERE[®] Business Applications. The following information will help you when installing updates and new releases.

New Directory vs Overwriting Existing Directory

TIW requires that upgrades be installed in a new program directory for three reasons:

- It is easy to copy changes that have been made, the login table, and the company default table from the older version. Otherwise, the files would have to be copied beforehand to prevent them from being overwritten when installing ALERE[®] Business Applications.
- Obsolete files may accumulate needlessly over time. A fresh directory avoids unnecessary files.
- Leaving the previous version intact provides a "fallback" position and makes technical support easier.

The program installs quickly, takes up little space and easily links to your existing data.

The first time you install the program, create a generic directory which will hold all versions of the program files now and in the future. For example: T:\ALERE. Install the program in that directory.

If this is not the first time you have installed the program, then install it to a new directory (T:\ALERENEW).

Once the installation is complete, copy the **wsaccess*** and **wslogins.*** files from the previous version, located in the SysFiles Directory, to the new program directory. If updating from Version 11 or higher also copy the **wsalere.dbf**. Enter ALERE[®] Business Applications and run TIW File Update for every company.

If updating from versions prior to 11, it is necessary to create new companies from the old data. Version 11 requires new directories or databases to be created. It is suggested that you open the Company Defaults screens of versions prior to 11 to make it easier to create the Company Default settings of the new company.



Quick Start Guide

Using a sample company, test the new installation. Once testing is complete, rename the old installation to ALERE_V(XX) and rename the new install (VALERENEW) to your original directory name (VALERE).

The startup properties on each workstation will not need to be pointed to the new directory using this method.

Note It is highly recommended that the General Installation Notes, included with the retail packaging, be referenced prior to upgrading ALERE.

Bringing Forward Modifications

Information on how to bring forward changes to the language sets, modifications with or without the **Developers Source Kit**, new custom reports, and modified existing reports can be found in the **General Installation Notes**. These notes are updated with each release and are included on a separate document included in your shipment.

Installing the HTML Manual on each Workstation

A Microsoft Security Update prevents CHM (compiled HTML files) from being viewed when they are being loaded from a network drive or remote server. This can affect computers running Windows® XP or newer.

- 1 When the installation program is set to install the manual on a workstation the following steps should not be necessary. However, if the HTML manual cannot be viewed when the Help button on a screen is selected, then follow these instructions.
- 2 Start ALERE® and head to *File > Maintenance > Company Defaults > Options*.
- 3 Select the “Use HTML Help” and “HTML Manual on Work Stations” options.
- 4 Save the change, exit the screen, and restart ALERE. The workstation will automatically download the manual from the server and use it locally. Thereafter, the manual will automatically be updated whenever the manual on the server is updated and ALERE® is restarted on the workstation.
- 5 Right click on your desktop shortcut to the ALERE® manual and select “Properties”.



Quick Start Guide

6 Change the target to:

“C:\TIWRUN\ALERE\ALEREMANUAL.CHM”
(Assuming your runtime files are at C:\TIWRUN)

7 Change the “Start In:” directory to “C:\TIWRUN\ALERE”.

8 Start the manual from your desk top shortcut. If you get a message asking if you want to start the program, select “Always” or “Yes”.

9 Verify that the contents and index show at the left side of the screen. If they do not, click on the “Show” button at the top left of the screen. If you do not have that button, use your mouse to drag the bar just inside the left edge of the screen to the right.

The Manual should now work from the shortcut or from within ALERE®.

Starting the Software for the First Time

To start ALERE® Business Applications

- 1 Select the icon on the desktop. The first screen to appear is the *ALERE Version Key Entry* screen.
- 2 Enter the serial number and **Activation Key** and select the **OK** button.
- 3 The **Help** files will be setup and ALERE, Inc., the sample company that was automatically installed, will be opened.

Note To only display the Accounting or Manufacturing ribbons, navigate to *File > Maintenance > Login Options*. In the center of the screen, there is an option entitled *Default Ribbon* which may be changed to view only Manufacturing or Accounting.



Quick Start Guide

Adding New Companies

The following sections discuss how to add new LAN companies to ALERE®.

Before You Begin

There are several key pieces of information that you should have available before adding a new company. They are as follows:

- A decision on whether or not items will be allowed to be overissued from inventory when there are none on hand.
- A decision on whether or not order numbers (such as sales orders, purchase orders, etc.) are to be manually entered or auto assigned.
- The inventory valuation system that will be used. The choices are *Standard, Average, LIFO, and FIFO*.

Note Once selected, the valuation method **cannot** be changed from the screen.

- The structure of the general ledger account numbers. Up to 24 spaces with six segments are permitted. The first segment, called the **Major Segment**, must be numeric. The remaining five segments may be alphanumeric.

Note Once set, segments may be added only.

- A company ID which may be up to six spaces wide and alphanumeric.
- A decision on what to name your inventory location.



Quick Start Guide

Adding a New LAN Company

- 1 Select the **New** button on the *Open Company* screen.
- 2 On the screen enter the name of the new company, set the database type to LAN, and select/create the directory in which its data will be kept.

Note ALERE[®] Business Applications will allow you to create the new directory if one does not presently exist. If it does exist, the F2 key or a double left click in the path field will display it.

Caution TIW requires that the files for each company be kept in separate directories. Do not place the company files in the same directory as the program files or in a subdirectory of those files. **Under no circumstances should company data be mixed with other programs or data.** It is strongly recommended that the TIWDATA directory is created and a separate subdirectory is added for each company that is set up.

- 3 Select the **Continue** button when the information has been entered. The following checks are made:
 - If the name of the new company is already used, a message in the upper right-hand corner of the screen will let you know. Reenter a different name.
 - If the new company's data path matches an existing company, you will be notified. Reenter a different path.
 - You will be notified if the new company's data path does not match an existing company but company data files are present. Reenter a different path, overwrite the existing files, or choose not to overwrite them. The last option will leave the files intact so that the new company can be connected to them.



Quick Start Guide

- 4 The *Company Defaults* screen is then displayed.

Caution The inventory valuation method and GL structure cannot be changed once saved. Ensure these are correct prior to saving.

- 5 Complete the information required on the screen and save it.
- 6 Upon exiting the screen you are returned to the Company Menu screen where you may now select the new company.

SQL Installation

The install process installs both the LAN and Client/Server ALERE®. The following sections discuss how to add new SQL companies to ALERE®. Microsoft SQL Server 2000 or newer must be installed prior to these steps.

Converting LAN Data to SQL

Microsoft SQL Server 2000 or newer must be installed, and ODBC connections from the workstations need to be set up prior to creating ALERE® SQL companies.

ALERE® Client/Server does not come with a sample company. Use this process to convert the ALERE® Accounting sample company, which is in VFP tables, to an ALERE® client/server sample company.

- 1 Run ALERE® Business Applications and select the new (empty) client/server company.
- 2 From the menu, select *File > System Tools > Access FoxPro*.
- 3 Type "DO LanToCS WITH <SQLDBNAME>" where <SQLDBNAME> is the name of the SQL Server database that will receive the converted data.

Note The data name must be within quotes. For example, **DO LanToCS WITH "ALEREINC"**



Quick Start Guide

When the *Select Directory* dialog pops up, select the directory containing the LAN company files. The utility will convert the LAN company data into the new client/server company.

Adding a New SQL Data Source

- 1 From Windows Control Panel or Administrative Tools, run Data Sources (ODBC).
- 2 Click the *System DSN* tab on the ODBC Data Source Administrator screen, and then click the **Add** button.
- 3 Select the "SQL Server" driver from the list and click the **Finish** button.
- 4 Enter "TIWSQL" in the Name field, "TIW SQL Server" in the *Description* field, and enter the SQL Server that will contain ALERE[®] data in the *Server* field. Click **Next**.
- 5 Continue with the DSN Configuration, choosing the desired settings or keeping the defaults. Click the **Finish** button to complete the configuration.
- 6 In SQL Server, assign the proper user access privileges in the new database.

Adding New SQL Companies

- 1 Select the **New** button on the *Open Company* screen.
- 2 On the screen enter the name of the new company, set the database type to Client/Server, and enter the Server, database name, Login, and Password in which its data will be kept.

Note ALERE[®] Business Applications will create the new database if it does not presently exist.

- 3 If you are creating the new company from previous versions of ALERE[®], select the appropriate "Import From" options at the bottom of the Add New Company screen. You can create a Client/Server company from either LAN or existing Client/Server data.



Quick Start Guide

- 4 Select the **Continue** button when the information has been entered. The following checks are made:
 - If the Company Name is already used, a message in the upper right-hand corner of the screen will let you know. Reenter a different name.
 - If the new company's database matches an existing company, you will be notified.
- 6 The *Company Defaults* screen is then displayed.

Caution The inventory valuation method and GL structure cannot be changed once saved. Ensure these are correct prior to saving.

- 7 Complete the information required on the screen and save it.
- 8 When you exit the screen, you will be taken to the TIW File Update screen. Run the file update on the new company.
- 9 Upon exiting the screen, you will be returned to the Company Menu screen where you may now select the new company.

Basic Accounting Implementation Steps

There are a series of basic implementation steps that should be performed before using a newly created company. They are as follows:

- Set up user login permission as appropriate.
- Establish a Chart of Accounts.
- Set up the Default GL Accounts.
- Establish the fiscal periods.
- Enter beginning general ledger balances.
- Review and setup necessary global definitions for codes, payment terms, units of measure, checking accounts, and tax tables.
- Enter inventory information if inventory is being used.
- Build customer and supplier lists.



Quick Start Guide

Basic Manufacturing Implementation Steps

There are a series of basic implementation steps that should be performed before using ALERE® Business Applications. They are as follows:

- Review and establish the company defaults and links to accounting.
- Set up user login permission as appropriate.
- Review and set up global definitions, including email rules.
- Establish bills of material, operation library, routes, material assignments, work centers, product classes, labor grades, maintenance procedures, and closed dates as necessary to the operation of the software.

Technical Support

TIW offers technical support for a period of one year after the initial purchase of the software. Technical support is also included in the *Software Maintenance Agreements* (SMA's) and *Technical Support Contracts*.

Call 610.258.5161 or email tech@tiwcorp.com. A *Technical Support Form* may also be used to submit questions or issues on the website at

www.tiwcorp.com/tech_support_form.html/

Be sure you have the following information when you contact us:

- The serial number and version of the software
- The name and version of your PC operating system

Guidelines for Reporting an Issue

- As best as you can, know the steps to creating the problem.
- If you have encountered an error message, carefully record it. The first error message encountered is the most important.
- Let us know if the problem was preceded by any odd behavior or network/hardware problems.
- Report any modifications to the hardware or software being used.



Quick Start Guide

Scope of Technical Support

Technical Support is designed to answer specific questions regarding how the software functions and what features are designed to do, report problems and address other technical issues. Explaining disciplines, training, installation, and systems hardware and network configuration are properly the responsibility of Authorized TIW Dealers.

Factory Training

TIW offers a wide scope of training and services designed to support you and your Dealer. The first step in deciding on which of these services might be appropriate is to discuss your requirements with your Dealer.

Technical Seminar

This course benefits both the new user and acts a refresher for the current user. After this three day course for Accounting or two-day course for Manufacturing, you should know how to:

- Install the software and set up a company.
- Step through the implementation sequence for each module.
- Use the features and processes.
- Apply the underlying concepts and understand why they are so important to the proper running of the software.

Developer's Seminar

This course is designed for the advanced user or developer who would like to understand how to use the powerful software architecture to make customizations, add capabilities or create vertical applications. In this three day course you will learn how to

- Create a good modification strategy.
- Use the many program hooks embedded throughout the software.



Quick Start Guide

- Modify the menus.
- Make report modifications and add new ones.
- Add and modify forms.
- Make use of the many callable functions.

Custom Consulting/Training

This is a mission critical application. Sometimes you need available a level of training and consultation that goes far beyond a classroom. For those occasions, TIW makes available on-site factory assistance. This type of support is appropriate when

- You want your key people trained on-site with your own company data.
- You need to understand the far-reaching consequences of implementation or operational decisions.
- You feel that you are only utilizing a fraction of the potential of the software and want to know how to move to the next level.
- You need a second opinion or advice on the use of key technology in the product.

Web Based Technical Training

These courses are custom designed to suit your company's specific questions when using ALERE. Web Based Technical training is ideal for

- Companies with multiple locations where users would be required to travel for training.
- Companies in search of an economical training solution which will not stop production.
- Training users to enable the utilization of more advanced features.

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