



**Network
Essentials
Guide**

Details™

PROJECT INFORMATION MANAGEMENT

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Welcome to Details

About this guide

This guide is written for the network administrator who will be installing Details on a network. This guide provides instructions for installing Details on a network and information relevant to running Details on a network.

- **Chapter 1, *Hardware and software requirements***, describes the minimum requirements for running Details
- **Chapter 2, *Installing Details***, provides instructions for installing the program on a network server, entering the serial number, adding licenses for concurrent users, and creating aliases and shortcuts on individual workstations.
- **Chapter 3, *Secondary installation activities***, describes the following installation activities: setting user access privileges and defining templates.
- **Chapter 4, *Using Details on a network***, describes issues and situations that may arise when running Details on a network. This chapter includes general issues, as well as platform-specific issues.

The License Log, which appears on the back cover of this guide, provides an easily accessible way to keep track of your Details licenses.

Registering your program

It is extremely important that you send in your registration card as soon as possible. This is the only way that we can know who you are and give you the customer support that you deserve. When you mail in your registration card, we can provide you with some very valuable services:

- Technical support
- Customer support
- Notices of upgrades and changes via email
- Future upgrade notices

You can mail the postage-paid product registration card to:

AEC Software, Inc.
22611-113 Markey Court
Sterling, VA 20166
USA

Or you can fax it to: (703) 450-9786.

Please take a minute now to fill out the registration card and read the enclosed information about customer and technical support.

Once you have registered your program, you will receive free and unlimited technical support.

AEC support services

If you have a question about the operation of the program, first look in the online help system, printed manual, or support knowledgebase located at <http://www.aecsoft.com/>. If you cannot find the answer, contact AEC Software Technical Support. Technical support is typically available Monday through Friday, between 8:00 AM and 5:00 PM Eastern Standard Time, USA. AEC provides free unlimited technical support to all registered customers for the life of the program.

You can contact AEC Software Technical Support in a variety of ways:

- Phone : (703) 450-2318
- Fax: (703) 450-9786
- Email: support@aecsoft.com
- WWW: <http://www.aecsoft.com/>

For sales information, call (703) 450-1980.

When calling AEC Software, please be prepared to give the following information:

- Your serial number. (This number is found on the Details box, on the back cover of the Details User Manual, on the envelope containing the CD-ROM, and on the Registration Card. You may also open the About Details dialog in the program to display the serial number.)
- The product version number.
- The type of hardware and the operating system on which you are running the program.
- The exact nature of your problem and what you were doing when it occurred.
- The exact message in any dialog boxes that appear on your screen in response to your problem.
- Any and all steps you have taken to solve the problem.



Hardware and software requirements

This chapter describes the hardware and software requirements for running Details on Windows and Macintosh operating systems. Read this section before installing Details on your network.

Hardware and software requirements

Before you install Details on your computer, please make sure that your computer system has the following configuration:

To run Details for Microsoft Windows® operating systems, you need the following:

- A computer with an 80386/DX processor (or higher)
- 4 MB or more of Random Access Memory (RAM)
- 10 MB or more of Hard Disk space
- A monitor supported by your operating system
- A mouse supported by your operating system
- Any printer with extended device mode drivers (made for Windows applications); PCL printers require at least 1 MB of memory

To run Details on a Macintosh® or Power Macintosh™, you need the following:

- A Macintosh computer using a Power PC 601 processor (or higher)
- 4 MB or more of application Random Access Memory (RAM)
- 10 MB or more of free Hard Disk space
- Macintosh Operating System 8.1 (or higher)
- A monitor supported by your operating system
- A mouse supported by your operating system
- Any printer with a Chooser-level driver

The default preferred application memory for Macintosh is available in the application icon's Info dialog. To view or change the application memory size, close the program, select the application icon, and choose Get Info from the File menu.

You should be familiar with the typical operation of applications for Windows or Macintosh operating systems, such as common operations with the mouse like dragging and operations on text like Cut, Copy, and Paste. If you have any questions, refer to the documentation that describes your operating system and these common operations.



Installing Details

The primary activities involved in installing the network version of Details are:

- Removing earlier versions of Details (if you are upgrading)
- Installing the Details software
- Entering your serial number
- Adding licenses for concurrent users
- Setting up quick access to Details on individual workstations

After completing the installation activities described in this chapter, see **Chapter 3, *Secondary installation activities***, for instructions on how to perform the following final installation activities:

- Setting user access privileges
- Defining templates

Upgrading from an earlier version of Details

This section contains information about upgrading your copy of Details. If your network has an earlier version of Details installed, you should read this section and follow the instructions.

Note:

If you have a Server Version License of Details, you may install it on the temporary memory, hard disk drive, or other storage device of a single computer, such as a network server. You may not, without written permission from AEC Software, use a single user license on a network in a server configuration. Nor can you use multiple single user licenses in conjunction with license metering software without first receiving written permission and paying the appropriate Server Version License fee to AEC Software. See the license, provided in the beginning of this guide, for more details.

Removing previous versions

If you are upgrading Details from an earlier version, the Details Installer will not automatically delete the older version. You must delete the older version Details. The license for the older version is void once you install the new version.

Important:

Before you delete the older version of Details, move or copy all your Details data files to a different folder/directory than the Details folder/directory. Once you delete a file, it may not be possible to restore the file. Consult your operating system documentation for more information about deleting and restoring files.

Removing an earlier network version from a Windows client

To remove an earlier version of Details, you must delete the Details directory and all its subdirectories from the network server and then delete Details shortcuts and program groups from individual workstations.

To remove an earlier server version of Details from a Windows 95, Windows 98, Windows 2000, or NT 4.x client:

1. From the administrator's workstation, click the **Start** button.
2. From the **Start** menu, select **Settings**, and choose **Control Panel**.
3. Double-click **Add/Remove Programs**.
4. If it is not already selected, click the **Install/Uninstall** tab.

5. Select **Details** from the list of installed programs.
6. Follow the instructions displayed on the screen.
7. On each workstation, find the **Details** shortcut icon.
8. Select the icon, and then press the **Delete** key.

Removing an earlier network version from a Macintosh client

To remove an earlier version of Details, you must delete the Details and all its subfolders from the network server, and then delete Details aliases from individual workstations. To perform this task, complete the following steps.

To remove an earlier server version of Details from a Macintosh client:

1. On the network server, find the folder that contains the previous version of Details. This folder should contain the Details application, as well as the Help, Examples, and Tutorial folders and the AppData folder.
2. Select the folder, and then drag it to the **Trash**.
3. On each workstation, find the **Details** alias.
4. Select the alias, and then drag it to the **Trash**.

Installing the network version of Details

This section describes how to install Details on a network.

Details can be installed on any network or server that is properly configured for Windows or Macintosh clients. Thus the server can be running any Network Operating System, such as Novell, Linux, Macintosh, Windows 95, Windows 98, Windows 2000, Windows NT 4.0, etc.

Note:

Beginning with version 3.0, the Details application name is version non-specific. On Windows it is named Details.exe, and on Macintosh it is named Details.

Installing the network version from a Windows client

Installing the network version of Details from a Windows client is as easy as installing to a local drive. You first prepare the network for installation, and then install the software on the server. After installing Details on the server, you then create shortcuts on the individual workstations used by the end users.

Preparing the network

To prepare the network for installation:

1. Log in as the System Administrator (or its equivalent) for your network.
2. Connect to the destination server and shared directory where you wish to install Details.
3. Continue to the next section, "Installing Details to the server from a Windows client."

Installing Details to the server from a Windows client

To install Details from a Windows client:

1. Exit all currently running programs and disable virus protection software.
2. Insert the Details CD-ROM into the CD-ROM drive or the Details Disk 1 into the floppy drive.

-
3. If installing from the CD-ROM, wait for the **Details CD** dialog to appear automatically and then click **Install Details**.
Or, if installing from floppy disk, choose **Run** from the **Start** button's menu, enter **a:setup** in the **Open** box (substituting your disk drive letter for a), and then click **OK**.
 4. Click **Next**.
 5. To accept the license agreement, click **Yes**.
 6. Read the **ReadMe** file.
 7. Click **Next**.
 8. Click **Browse** to navigate to the location on the server where you want to install Details.
 9. Follow the instructions displayed on the screen to choose the location.
 10. Click **Next**.
 11. Select the installation type.
 12. Click **Next**.
 13. If installing from floppy disk, insert the Details floppy disks as requested, and click **OK** after inserting.
 14. If you wish to change the default name of the **Details** program folder, enter a new name or select one from the existing list.
 15. Click **Next**.
 16. Select which program shortcuts you would like created.
 17. Click **Next** and the program installs.
 18. Click **Finish**.
 19. When the window opens, read the **ReadMe** file.
 20. Close the **ReadMe** window.
 21. Continue to the section, *Entering your serial number*, which appears on page 12 of this guide.

Installing the network version from a Macintosh client

Installing the network version of Details from a Macintosh client is as easy as installing it on a local drive. You first prepare the network for installation, and then install the software on the server. After installing Details on the server, you then create aliases to Details on the individual workstations used by the end users. Instructions for creating aliases appear later in this chapter.

Preparing the network

To prepare the network for installation:

1. Log in as the System Administrator (or its equivalent) for your network.
2. Connect to the destination server and shared folder where you want to install Details.
3. Continue to the next subsection, "Installing Details to the server from a Macintosh client."

Installing Details to the server from a Macintosh client

To install Details from a Macintosh client:

1. Disable non-essential systems extensions (i.e. non-network related extensions), virus protection software, file sharing, and program linking.
2. Insert the Details CD-ROM into the CD-ROM drive or the Details Disk 1 into the floppy drive.
3. When the **Details** folder opens automatically, double-click the **Install Details** icon.
4. When the install screen appears, click **Continue**.
5. To accept the license agreement, click **Accept**.
6. Read the **ReadMe** file.
7. Click **Continue**.
8. Select the installation type, **Easy** or **Custom**.
9. Navigate to the location on the server where you want to install Details.
10. Click **Install**.

11. Follow the instructions displayed on the screen.
12. Click **Quit**.
13. Continue to the next section, *Entering your serial number*.

Entering your serial number

When you start the program for the first time, the Serial Number dialog appears. Enter your name, organization, and your program's serial number in this dialog. You can find your serial number on the Details box, on the back cover of the Details User Manual, on the envelope containing the CD-ROM, or on the Registration Card.

If you do not enter the appropriate information, you will not be able to fully use Details.

To enter your serial number for Details:

1. Start Details, if it is not already running.
2. Enter the requested information in the dialog.
3. Click **OK**.
4. From the **File** menu, choose **Exit** or **Quit**.
5. Continue to the next section, *Adding licenses for concurrent users*.

Adding licenses for concurrent users

The term concurrent users is defined as more than one person accessing, at the same time, a single copy of Details stored on a network server. Your network server version of Details has both a serial number and a key code which together control the total number of concurrent users. When you initially install Details, the default number of concurrent users is one. To enable more than one user to concurrently use Details, you need to enter a valid key code.

To configure your copy of Details for concurrent users:

1. Make sure that Details has been installed on a server or shared directory.
2. Start Details from your workstation, if it is not already started.
3. Display the **About Details** dialog.
4. Click **Users**.
5. Enter your key code in the **Key Code** box. You can find your key code on the back cover of the Details User Manual, on the envelope containing the CD-ROM, and on the Registration Card.
6. Click **OK** to close the **Key Code** dialog.
7. Click **OK** to close the **About Details** dialog.
8. From the **File** menu, choose **Exit** or **Quit**.
9. Update your license log on the back cover of this guide.
10. Continue to the next section, *Setting up quick access to Details for the end user*.

Note:

Adding more concurrent users to your license is an easy task. If you wish to purchase additional licenses to increase the number of licensed concurrent users, call the AEC Software Corporate Sales Department at (800) 346-9413 or (703) 450-1980, or send an email to sales@aecsoft.com for a new key code. When ordering, you will need to verify your serial number. You can find your serial number on the Details box, on the back cover of the Details User Manual, on the envelope containing the CD-ROM, on the Registration Card, or in the About Details dialog.

Upon purchasing additional licenses for concurrent users, you will receive a new registration card with a new key code. Your serial number, however, will remain the same.

Setting up quick access to Details for the end user

Once you have installed Details on the network server, you can create an alias or shortcut for Details on the end user's workstation, so that the end user can run Details without navigating to the server each time.

Creating a shortcut on a Windows 95, Windows 98, Windows 2000 or Windows NT 4.0 workstation

To create a shortcut on a Windows workstation:

1. From a Windows workstation, log in as an end user.
2. Right-click the **Task** bar.
3. From the menu that appears, choose **Properties**.
4. If it is not already selected, select the **Start Menu Programs** tab.
5. Click **Add**.
6. In the **Create Shortcut** window, click the **Browse** button, and navigate to the **Details** application on the server.
7. Click **Open**.
8. Click **Next**.
9. Select a location in the **Start** menu for the shortcut.
10. Click **Next**.
11. If you want to change the shortcut name in the dialog, type a new name.
12. Click **Finish**.
13. Click **OK**.
14. Repeat Steps 1 through 13 for each workstation.
15. Continue to the subsection "Setting user access privileges" in **Chapter 3, Secondary installation activities**.

Creating an alias on a Macintosh workstation

To create an alias on a Macintosh workstation:

1. From a Macintosh workstation, log in to the server as an end user.
2. Create a new folder on Macintosh workstation and name it **Details**.
3. From the Macintosh workstation, navigate to the **Details** application on the server.
4. Open the **Details** folder on the server, and select the **Details** icon.
5. From the **File** menu, choose **Make Alias**.
6. Copy the alias to the **Details** folder you created on the workstation in Step 1.
7. Delete the alias in the **Details** folder on the server.
On some network operating systems, user information is stored when you create an alias on the server. Because of this, it is recommended that you delete the alias on the server after you copy it to a workstation, and recreate a new one for each workstation.
8. Repeat Steps 1 through 7 for each Macintosh workstation.
9. Continue to the subsection "Setting user access privileges" in **Chapter 3, Secondary installation activities**.



Secondary installation activities

This chapter describes the following installation activities:

- Setting user access privileges
- Defining templates

Setting user access privileges

In general, application access privileges are granted automatically to any user who has rights to access the folder/directory that contains the Details application and can be seen from the user's individual workstation. To ensure that appropriate access is granted, make sure the following access rights are designated.

Setting user access privileges for Windows users

To set user access privileges for Windows users:

1. Ensure that the **Details** application and all other installed materials are located in the same directory.
2. Designate the following application and directory as shareable:
 - **Details** application (**Details.exe**) and directory
3. Give users read/write privileges to the **AppData** directory and its contents in the **Details** directory on the server.

Users need only read-only privileges for all other Details files and directories, including the application itself, Example files/directory, Help files/directory, and Tutorial files/directory. See your network documentation for specific instructions on how to set access privileges. You may want to consider making the AppData folder hidden.

Setting user access privileges for Macintosh users

To set user access privileges for Macintosh users:

1. Ensure that the **Details** application and the **Help** folder are located in the same folder.
2. Designate the following applications and folders as shareable:
 - **Details** folder and **Details** application.
 - **QuickHelp**[™] application and the **Help** folder
3. Give users read/write privileges to the **AppData** folder and its contents in the **Details** folder on the server.

Users need only read-only privileges for all other Details files and folders, including the application itself, Example files/folder, Help files/folder, and Tutorial files/folder. See your network documentation for specific instructions on how to set access privileges. You may want to consider making the AppData folder hidden.

Defining templates

Details users can also use templates to create new files. A template can contain field definitions and report definitions. Templates are useful when many files involve essentially the same information. Including this information in a template means that users will not have to redefine fields or reports each time they create a new file.

To create a new file using a template, an end user first chooses New from the File menu. The New File dialog that appears has two options: New File and New from Template. The second option allows the end user to choose a template and create a new file based on the template file.

The right side of the New File dialog contains a list of existing templates that the user can choose from. This list contains templates that are stored on the server and on individual workstations. Only those templates stored on the server are accessible to all users on the network. Templates listed above the separator are stored on the server; those listed below the separator are stored on that particular workstation. If there is no separator, all of the templates listed are stored on the server.

Templates stored on the server are located in the Templates subfolder/subdirectory that is in the same folder/directory as the Details application. Templates stored on the individual workstation are located in the AECSOft folder/directory in the System folder or Windows directory.



Using Details on a network

The network version of Details provides seamless integration of files between local workstations and the server. This chapter contains information about concurrent usage, file locking, fonts, and other cross-platform issues that network administrators should be familiar with. It also contains information about online help, troubleshooting, and frequently-asked questions.

Concurrent usage

Exceeding the number of licensed concurrent users

When a user launches Details and the number of current users exceeds the number permitted by the concurrent-user license, Details displays a warning. When the user clicks OK, a dialog appears listing the user names currently running the application.

From this dialog, the user can either attempt to retry running Details or quit. The user will not be able to run the application until another user quits the application and the number of users is less than the number of concurrent users allowed by the license.

Read/Write and Read-Only Access

Details allows only one user to open a file and make changes to it as a read/write file. Subsequent users attempting to open that file will be able to open the file only as a read-only file until the first user closes the file.

If you open a file with read-only privileges, and the file later becomes available with read/write privileges while you are still working within the application, you must reopen the file to gain read/write privileges. You will not be able to save the file using Save, but you can save the file under another name using Save As in the File menu.

To open a file on the network:

1. Open the file.
 - If the file is not currently in use with read/write access by another user, use the file the same way you would use other files.
 - If the file is currently in use with read/write access by another user, a warning will appear.
2. To save a copy of a file with read-only access, choose **Save As** from the **File** menu.

Once the user that opened the file closes it, a new user can then open it with read/write access.

To re-establish read/write privileges after a file in use has been closed:

1. If you have a file with read-only access open, close the file.
2. Open the file to establish read/write privileges.

You now have read/write privileges. Any other users that try to open the file will be warned that they may only open it as a read-only file.

AppleTalk Filing Protocol permission model

The AppleTalk Filing Protocol permission model is a Macintosh networking protocol that allows a Details file with read-only privileges to be opened multiple times across a Macintosh network. Without the AppleTalk Filing Protocol permission model, only one user at a time can open the file. If your

network does not use the AppleTalk Filing Protocol permission model, you will not be able to open a file multiple times. This technology only affects whether or not a file can be opened multiple times and does not impact the performance of Details.

Note:

Most current network operating systems comply with the AppleTalk Filing Protocol permission model, but some older systems may not.

Fonts

If a file is opened on a workstation that has different fonts than the workstation it was created on, font substitution may occur, causing text in data columns, headers, and footers to wrap differently. Use fonts that are common to both workstations to prevent font substitution.

Printer information

The page orientation, page size, and percent of enlargement or reduction set for a file on one platform is not transferred to the other platform. These settings are independent of Details and are stored uniquely for printers on each of the platforms on which you are working.

The default printer driver on the workstation to which the files were transferred determines the settings used. If the page orientation, page size, or percent enlargement or reduction changes, choose Page Setup from the File menu to set the defaults to the correct settings.

Using online help

Online help is available to all concurrent users provided that the Help folder/directory is designated as sharable and is in the same folder/directory as the Details application. For Macintosh, the QuickHelp application must also be designated as shareable.

Restarting after unexpected termination

The server keeps track of which users are concurrently using Details. If the program should terminate unexpectedly (for example, a power failure or system error), this information could be damaged. Details automatically cleans up damaged information after an unexpected termination; however, the application must be running to do so.

To facilitate a faster clean-up of the unexpected termination:

1. Restart Details and allow it to run from any workstation that was running Details and experienced an unexpected termination.

The program can be used by this workstation or any other workstation during this time; clean-up occurs in the background. If you cannot run the program (the Maximum User dialog appears), then try Step 2.

2. If you don't know which workstations were running Details, run the program from any workstation for approximately 15 minutes (time will vary based on the number of users and network traffic) to clean up the unexpected termination.

A minimum of one user must be able to launch Details to clean up unexpected terminations. If you cannot run the program (the Maximum User dialog appears), locate one of the users listed in the dialog and try Step 1 again from that user's workstation. If you are still not successful in cleaning up the termination, try Step 3.

3. If neither of the previous steps correct the problems caused by the unexpected termination, clean up the termination by deleting the **APP810.APD** file from the **AppData** folder/directory in the **Details** folder/directory.

Frequently asked questions

Question: Why does Details require that I enter the serial number each time I start the application?

Answer: You do not have read/write privileges for the AppData folder/directory and its contents. See the subsection "Setting user access privileges" in **Chapter 3, *Secondary installation activities***, for more information.

Question: Why do I get a Maximum Users alert when I try to open a single-user version of Details in Windows?

Answer: Details was active when you had an unexpected termination. For example, Details was open (either in the foreground or background) when the operating system crashed and you had to restart your computer.

To solve the problem, follow the directions in the previous section, *Restarting after unexpected termination*. If you are running a network version and the maximum number of concurrent users has not been reached, Details will open the application using another one of the available concurrent-user licenses.

Question: Why is the Maximum User number that is currently displaying different from the number of licenses I purchased?

Answer: Check to be sure that you entered the correct enabling code.

Question: Why do I get an alert message telling me that the maximum number of users is running Details from the network when no one is running the program?

Answer: This can occur following a crash at any user's workstation. The Network Administrator needs to delete the item AppD810.ApD from the AppData folder. It will be regenerated when you run the program.

Question: Once a minute, my computer gives off a default alert sound. Why does this happen?

Answer: The Network Administrator needs to give you read/write privileges to the AppData folder. The alert sound is triggered by your computer's attempts, at 60 second intervals, to open the AppData folder properly (read/write). When it is unable to do this, the alert is activated. See the subsection "Setting user access privileges" in **Chapter 3, *Secondary installation activities***, for more information.

