
CUSTOMER GUIDE: Installation

Overview

Thank you for choosing to install FLEETMATE: the low-cost fleet maintenance management software that can help you become proactive with fleet maintenance; extend the useful life of your fleet assets; and give you the information you need to effectively manage your fleet maintenance.

This Customer Guide is for the installation of the **Standard Edition** only. For the Enterprise Edition of FLEETMATE, refer to the Installation Guide for that product.

The FLEETMATE product is installed using an installer program. This document will cover the installation process beginning at the point you download the installer from the FLEETMATE Website.

FLEETMATE features context-sensitive help. Once you have FLEETMATE installed, you can press your **[F1]** key to receive help with essentially any window you are currently using. You can also click the **Help** menu and **Search** the help system for information, or click **Contents** for a listing of all Help topics.

Once you install FLEETMATE on your PC, we also recommend that you take a few minutes to review the other **Customer Guides** on the FLEETMATE Website. Each is focused on a specific topic, and will help you get started with FLEETMATE.

The FLEETMATE Website also features our **FLEETMATE@WORK Online Lessons**. This collection of brief Flash videos will cover many of the features offered by FLEETMATE, and will actually demonstrate how they work. These video clips can be very beneficial by helping you grasp the basics as you begin to use FLEETMATE.

Notes:

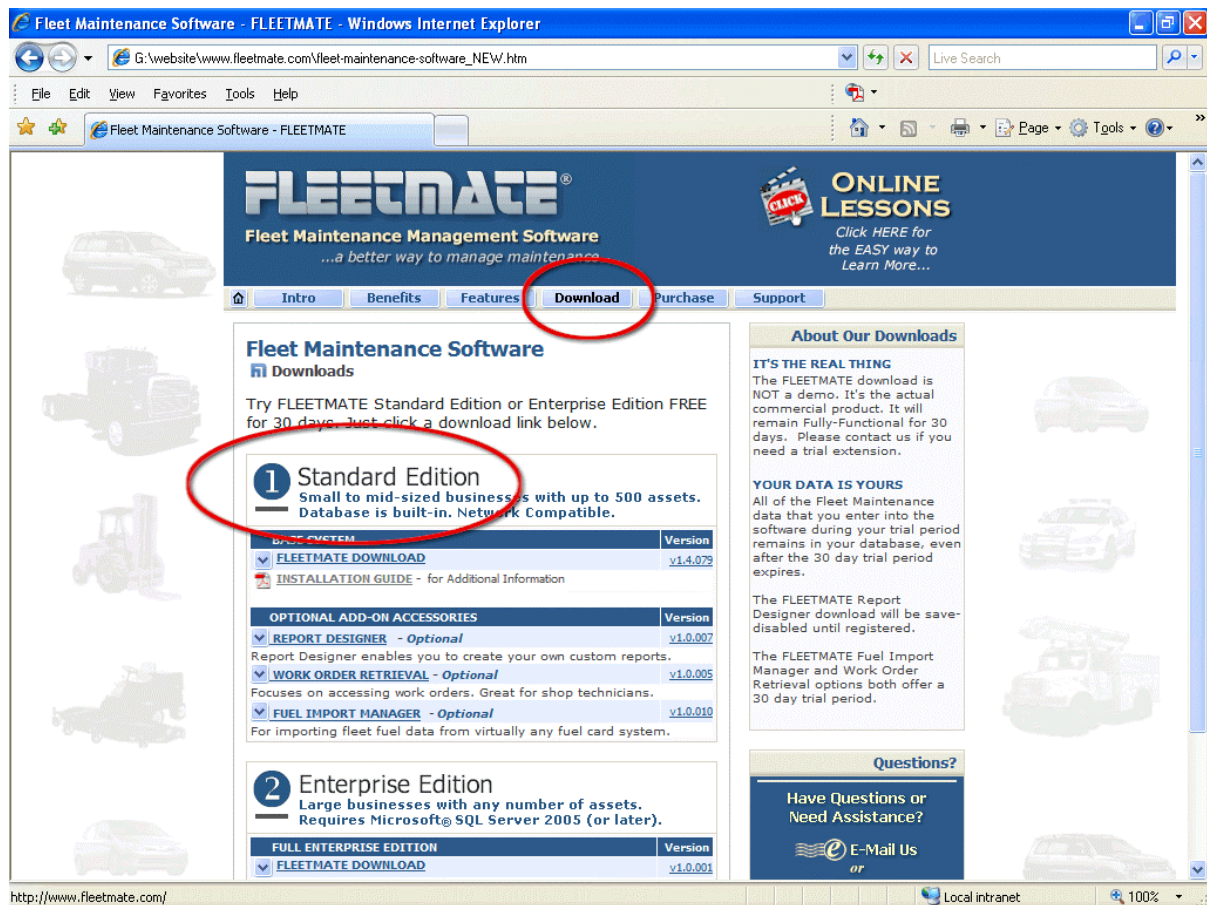
In 2005, we renamed our fleet maintenance management software. FLEETMATE is the new product name. It is essentially the same software, with a number of additional features.

If you have been using our prior CARCare Fleet Edition software, please refer to the end of this document for additional information concerning the upgrade to FLEETMATE.

CUSTOMER GUIDE: Installation

Download

The first step in the installation process is to download the FLEETMATE Installer from the FLEETMATE Website. Click the **Download** button to navigate to the download page. Next, click the **Download Link** for the Standard Edition to begin the download process. Your screen should resemble the picture below.



FLEETMATE Download Page on the Web

Once you click the **Download Link**, your browser may ask if you want to **Run** the file, **Save** the file, or **Cancel**. Click **Run** to run the installation from the Web, or click **Save** and choose a convenient location to save the file.

The file will be saved as **fmsetup.exe** in the location you selected. Once the download completes, you will be ready to run the **fmsetup.exe** installer to install FLEETMATE on your PC.

CUSTOMER GUIDE: Installation

Running the Installer - Upgrading Existing FLEETMATE Installations

If this is a **NEW** installation, please skip to the next page.

If you have a prior version of FLEETMATE already installed, you will need to upgrade **each PC** on which FLEETMATE is installed.

If you have multiple networked PCs that have FLEETMATE installed, you will need to **shutdown FLEETMATE** on **all PCs** before proceeding with the upgrade process below.

Please follow these steps:

1. Run the **fmsetup.exe** file on **each PC**. Do not start the latest version of FLEETMATE until all PCs have been upgraded with the latest version.
2. Start FLEETMATE on **One (1) PC**. This will allow the software to update its database to the latest format. Do not start FLEETMATE on any other PCs until this process has successfully completed.

If you receive a message indicating that your database is **in-use**, this means that a prior user session did not end normally. Follow these steps to remedy the situation:

- a. Open the **User Administration** window, click the **Clear Session Table** button, and then close the User Administration window.
 - b. Exit FLEETMATE and then restart it.
 - c. If a Database Repair does not automatically run, run it manually using the **File | Database | Utilities | Repair...** menu option.
3. Your upgrade should now be complete.

CUSTOMER GUIDE: Installation

Running the Installer – Initial Installation

If you already ran the installation from the Web, then you may have already gone through this process. If that is the case, skip to the next page.

The **fmsetup.exe** file that you downloaded is called an **installer**. The installer contains the full commercial release of FLEETMATE.

To install FLEETMATE on your PC you will need to locate the **fmsetup.exe** installer. To do this, start Windows Explorer and navigate your disk to locate the **fmsetup.exe** installer. Double-click on it to begin the installation process. The installer will begin initializing and display a **Welcome** dialog. Click **[Next->]**.

The **End-User License Agreement** will be displayed. If you accept the terms of the Agreement, click the **[I Accept]** button to continue. If you do not accept the terms of the Agreement, click the **[I Do Not Accept]** button. You will then be taken back to the prior screen where you may click **[Cancel]** to cancel the installation process. You must accept the agreement in order to proceed.

After accepting the End-User License Agreement, you will see a **Choose Destination Location** dialog. This dialog enables you to determine where, on your disk, FLEETMATE will be installed. The **default** location will be **C:\Program Files\FLEETMATE**. This is the **RECOMMENDED** location. Click the **[Next->]** button to continue.

You will now be asked to choose a **Program Manager Group** to store the FLEETMATE shortcuts that will be created. The **default** and **RECOMMENDED** Group is **FLEETMATE**. Click the **[Next->]** button to continue.

You are now ready to begin the actual installation process. Click the **[Next->]** button to begin.

Once the installation process is complete you will see an **Installation Complete** dialog, indicating that the process has been completed. Click the **[Finish>]** button to close the installer. FLEETMATE is now installed on your PC.

CUSTOMER GUIDE: Installation

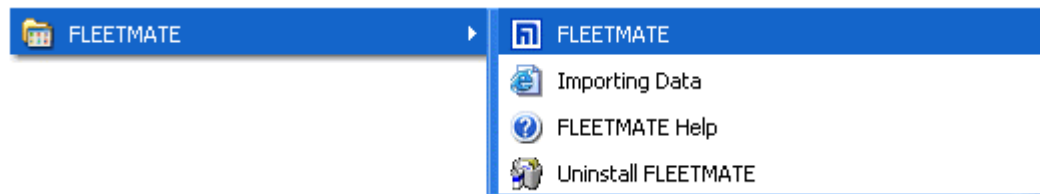
Starting FLEETMATE



For your convenience, a **FLEETMATE** shortcut was installed on your Windows™ Desktop. This enables you to start FLEETMATE directly from this shortcut. If you do not want the FLEETMATE shortcut on your desktop, you may delete it and use the alternative approach discussed below to start the FLEETMATE software.

To start the FLEETMATE software from the **Start** button, follow these steps:

- Click the **Start** button.
- Position your mouse over the **All Programs** group. The All Programs menu will expand.
- Position your mouse over the **FLEETMATE** program group. (see picture below)
- Click the **FLEETMATE** shortcut.



FLEETMATE Desktop Program Group

Network Administrator Notes:

When using FLEETMATE via remote access (e.g. **Terminal Server** or **Citrix**), you may need to edit the FLEETMATE shortcut target from **C:\Program Files\FLEETMATE\fm32.exe** to **<installation-path>\fm32.exe**. This will accommodate the actual installation path that may be different on your server. Set your startup location to *<installation-path>*.

When running FLEETMATE on **Windows Vista**, we recommend that you right-click your FLEETMATE shortcut, choose **Properties**, click the **Compatibility** tab, check the box labeled **Run this program as an administrator**, and then click OK. This will avoid having your external files stored under the **VirtualStore** folder in Vista.

CUSTOMER GUIDE: Installation

FLEETMATE Startup

When FLEETMATE is started it will display a '**splash**' screen with a progress bar, indicating that the system is starting. This will take a few moments.

FLEETMATE will display a **Tips** window each time you start it, unless you have turned-off this feature. You may also display these Tips at any time by selecting the **Help | Tip of the Day...** menu option.

If any vehicles (or other assets) in your fleet require your attention, a **Reminders** window will then appear. Once you close the **Reminders** window, you will see the FLEETMATE main window. You may now begin using the system to perform whatever tasks are necessary.

We have provided sample data so that you can navigate through the system and visit the various windows and features. You can certainly delete the sample data and/or enter your own information as you use FLEETMATE.

If you are evaluating FLEETMATE, any data that you enter during your 30-day evaluation is yours to keep, and will remain in your database. Even if your 30-day evaluation period expires, your data still remains in-place.

CUSTOMER GUIDE: Installation

FLEETMATE Network Installation - Basics

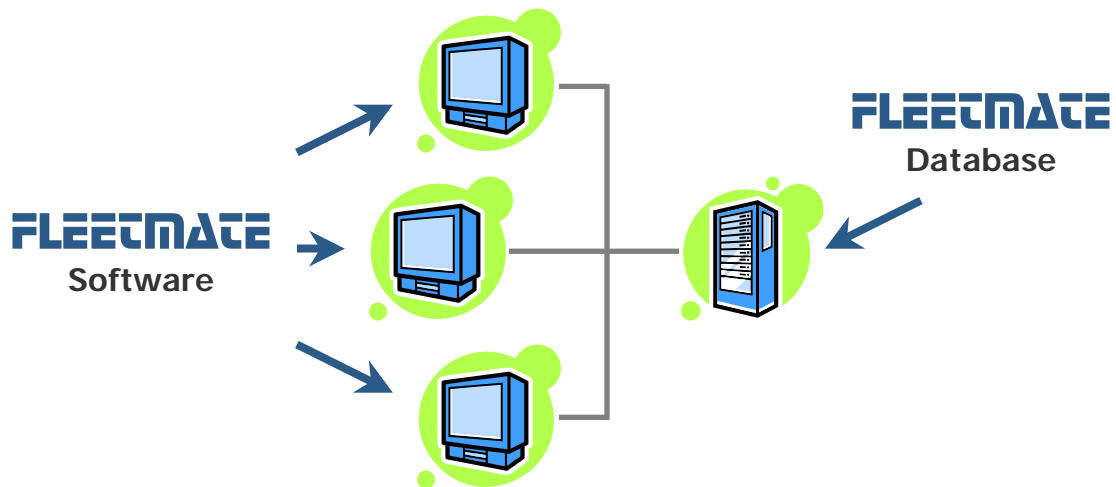
FLEETMATE will require a 10/100 Mbps hardwired network connection. For use at remote offices, we recommend using a product such as Windows Terminal Server, Citrix®, or GoToMyPC® for remote connectivity. **Wireless network connections (e.g. 802.11x) are not supported.**

If you need multiple users to access shared fleet information, you'll need to install FLEETMATE on each PC, at which the software will be used, using the **fmsetup.exe** installation program. Your database can be located on a network server in a shared folder of your choice.

User Account Permissions

Each user account defined in your operating system must grant **Full Control** to the folder where your database is stored. We recommend that you setup a **mapped drive** to the shared database location so that each user can easily access the shared database.

Permissions will need to grant **Full Control** to the **C:\Program Files\FLEETMATE** folder on the local disk, and all folders beneath it.



Basic Network Configuration Diagram

Each user will need to use the **File | Database | Open...** menu function one time to open the shared database. Afterwards, FLEETMATE will remember the location of the last database used between sessions, so that you will not need to re-open the database manually each time you start the program.

CUSTOMER GUIDE: Installation

Moving from CARCare Fleet Edition to FLEETMATE

During installation, the FLEETMATE installer will have attempted to locate your default CARCare Fleet Edition database (CARCare.fdb) on your local disk in the C:\Program Files\CARCareFleet folder. If the file was found, the FLEETMATE installer will have made a copy of the database file and placed it into the **C:\Program Files\FLEETMATE** folder on your PC. It named the file **FLEETMATE.fdb**.

If you had been using a database stored on your network, or in a different location, the installer will have skipped this process. It will use your current database path and database name in FLEETMATE.

When you start FLEETMATE, you may need to use the **File | Database | Open...** menu option to open your database on your network server. From that point on, FLEETMATE will remember the database location between sessions. You may also need to perform a similar process if your CARCare Fleet Edition database is named something other than "CARCare.fdb".

Once you have initially opened your prior CARCare Fleet Edition database with FLEETMATE, please immediately run a **Database Repair** before taking any other steps. In most cases, FLEETMATE will automatically detect the need for the repair, and will take you directly to the Database Repair dialog. You must run a database repair immediately following the upgrade to FLEETMATE, so that FLEETMATE can correctly recognize and reorganize your prior CARCare Fleet Edition data.

Please write us at support@fleetmate.com or call us at **410-282-3603** if you need any assistance with this process and we will be glad to assist you.

Thank you, once again, for choosing to install FLEETMATE!