
CUSTOMER GUIDE: Installation

Overview

Thank you for choosing to install FLEETMATE, 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 **Enterprise Edition** only. For the Office or Standard Edition of FLEETMATE, refer to Installation Guide for those products.

The Enterprise Edition of FLEETMATE uses **Microsoft® SQL Server 2005** (or later) for data storage. You will need to have SQL Server available on your network and you will need access to **SQL Server Management Studio** in order to setup your databases.

The basic steps involved in installing FLEETMATE Enterprise Edition and preparing it for initial use are as follows:

- 1. Download and Install FLEETMATE Enterprise Edition on Your PC**
- 2. Create Your SQL Server Database**
Contact your IT Support group or Database Administrator if you need assistance.
- 3. Migrate Your Existing FLEETMATE Office Edition Database (Optional)**
This is only necessary if you were running a prior version of FEETMATE and you need to migrate your prior data.
 - a. Run a Database Repair**
This will reorganize your existing FLEETMATE Office database in preparation for the data migration below.
 - b. Run the Migration Utility**
This will migrate the data in your prior FLEETMATE Office database to your new Enterprise Edition database.
- 4. Begin Using FLEETMATE Enterprise Edition**
 - a. View the Online Lessons at www.fleetmate.com**
 - b. Review the Customer Guides at www.fleetmate.com**

CUSTOMER GUIDE: Installation

1 – Download and Install FLEETMATE Enterprise Edition

The first step in the installation process is to download the FLEETMATE Enterprise Edition Installer from the FLEETMATE Website. Click the Download button (#1 in the picture) to navigate to the download page. Next, click the Download Link (#2 in the picture) to begin the download process. Your screen should resemble the picture below.



FLEETMATE Download Page on the Web

Once you click the **Download Link** (#2 in the picture), your browser may ask if you want to **Run** the file, **Save** the file, or **Cancel**. Either **Run** from the Web, or click **Save**, and then choose a convenient location to save the file. Once the download completes, you will need to double-click on the **fmeesetup.exe** file to install FLEETMATE Enterprise Edition on your PC.

CUSTOMER GUIDE: Installation

The installer will begin initializing and will then display a **Welcome** dialog. Click [**Next->**].

An **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 Enterprise Edition will be installed. The *default* installation location will be **C:\Program Files\FLEETMATE Enterprise**. This is the RECOMMENDED location. 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

2 – Creating your FLEETMATE Enterprise Edition Database

Two (2) scripts are included that will make it easy for you to create your initial FLEETMATE Enterprise Edition databases on SQL Server. This process will enable you to create a **Production** database and a **Test** database. You will need to run the scripts on a PC or server where **SQL Server Management Studio** is installed.

Script files are located in the **C:\Program Files\FLEETMATE Enterprise\Database\Scripts** folder, and the filenames are:

- **Create_FLEETMATE.sql** and
- **Create_FLEETMATE_TEST.sql**.

The two (2) databases will be named: 1) - **FLEETMATE**, and 2) – **FLEETMATE_TEST**. These are *default* names for your databases. To create your **Production** database, double-click on the **Create_FLEETMATE.sql** script file, or open SQL Server Management Studio and use the File | Open... menu to open the script. Once you login to SQL Server Management Studio, click the **Execute** button to run the script. This will create your production database.

To create your **Test** database, double-click on the **Create_FLEETMATE_Test.sql** script file, or open SQL Server Management Studio and use the File | Open... menu to open the script. Once you login to SQL Server Management Studio, click the **Execute** button to run the script. This will create your test database. Use the test database for training purposes, and for experimentation. This way your production data will remain unaffected by these activities.

Once you execute the scripts, the new FLEETMATE databases will be available from within SQL Server.

If you need/want to change the name of a database, make a copy of a script and save the copy with an appropriate filename. Open the copy of the script file in a text editor, and perform a global replace on the term **FLEETMATE**, or the term **FLEETMATE_TEST**, depending upon which script file you copied. Lastly, run the modified script to create your database with a different database name.

CUSTOMER GUIDE: Installation

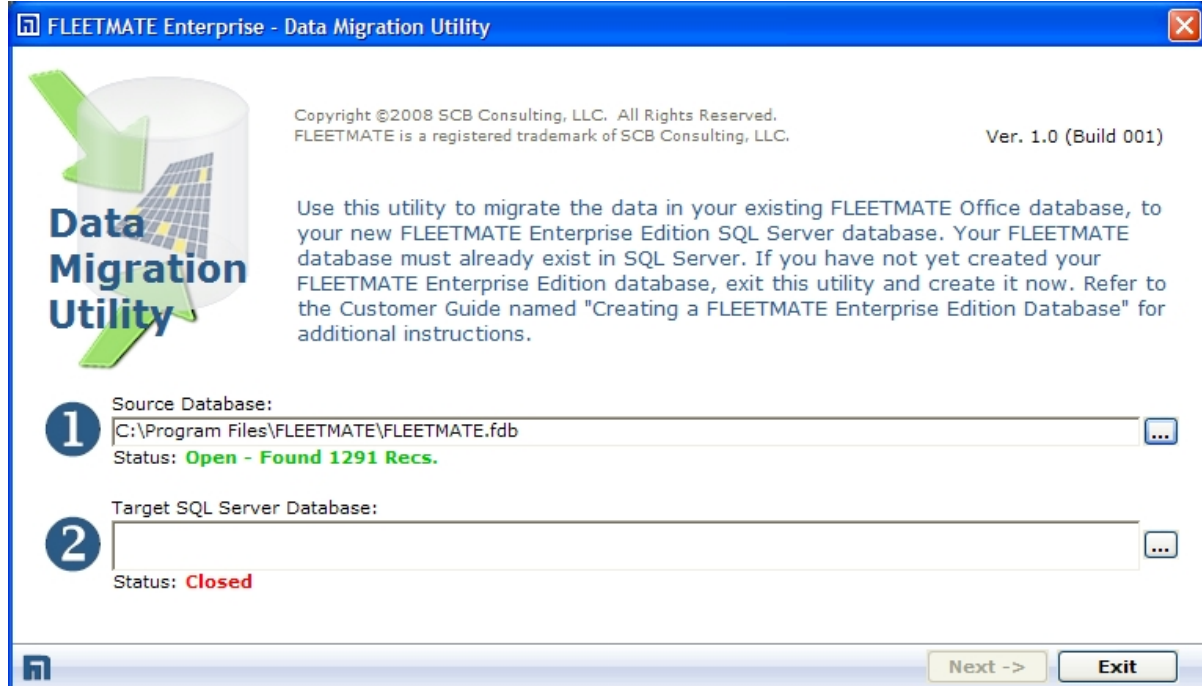
3 – Migrating Your Existing FLEETMATE Database

If you did not previously use FLEETMATE, you can skip this section. However, if you had previously used FLEETMATE, you can migrate your existing data to your new FLEETMATE Enterprise Edition database. It may be helpful for you to seek assistance from your IT support group and/or your Database Administrator as you proceed through this process.

To prepare for migrating your prior data, start your *prior* FLEETMATE software and run a **Database Repair** (File | Database | Utilities | Repair...). This will help ensure that your database is organized properly, and any wasted space is reclaimed.

The migration process requires that all existing Work Order Numbers be **unique**. There also cannot be any missing work order numbers. You may wish to review your current data prior to attempting a migration.

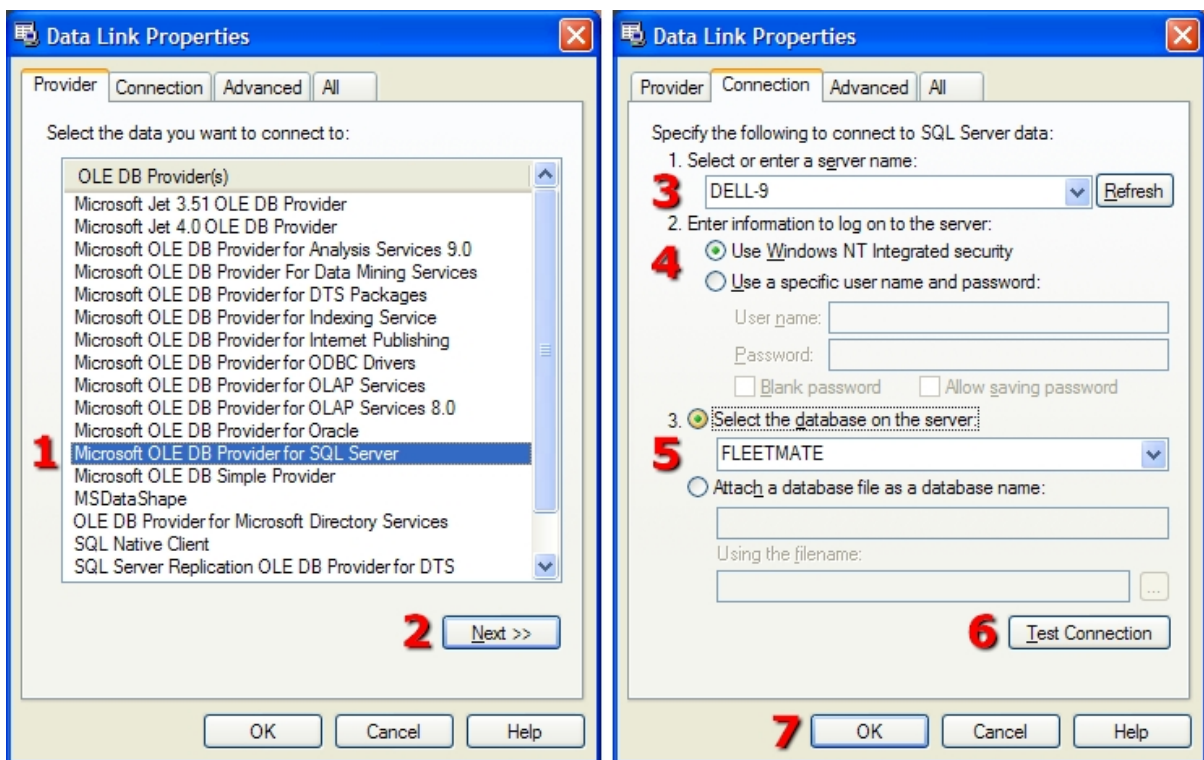
In the **C:\Program Files\FLEETMATE Enterprise** folder on your PC, you will find the Data Migration Utility. The **FMEEMIG.exe** file is the Data Migration Utility. Double-click on the FMEEMIG.exe file to start the software. Your screen should resemble the picture below.



Data Migration Utility – Initial Window

CUSTOMER GUIDE: Installation

- 1** The first step is to click the **Browse** button (on the right) to locate and select your prior FLEETMATE database file. This is the **Source** database. If any errors are reported when you select your prior database, you will need to stop and correct those issues before continuing.
- 2** The next step is to select the **Target** FLEETMATE Enterprise Edition SQL Server database that you want to migrate your prior data into. To do this, click the **Browse** button. This will open the standard Windows Data Link Properties dialog, as pictured below.



Windows Data Link Properties Dialog

The steps required are numbered in red. Simply progress through these steps to select the **Target** FLEETMATE Enterprise Edition database.

CUSTOMER GUIDE: Installation

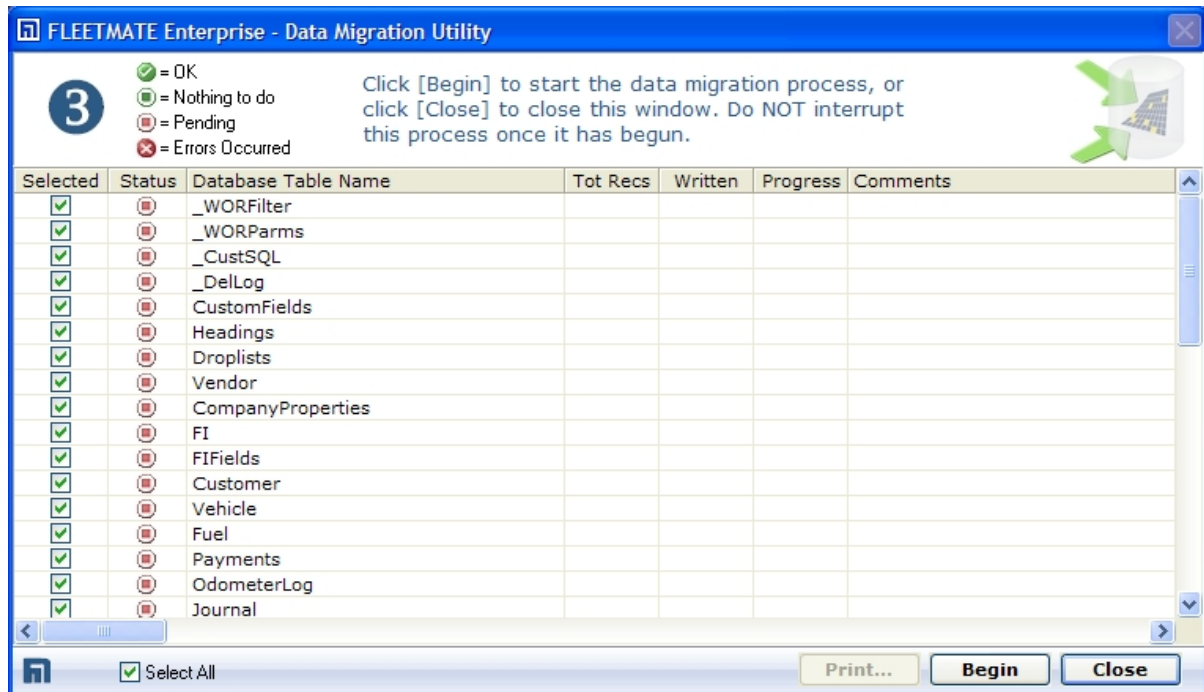
Data Link Properties Dialog – Steps

1. **Select the OLE DB Provider**
Choose **Microsoft OLE DB Provider for SQL Server**
2. **Click [Next >>]**
3. **Select the Server**
This is the server where your database resides. Contact your Database Administrator if you do not know the server name.
4. **Select the login method**
Integrated Security (first option) is the default method. Your Database Administrator may have configured your system differently, so you may need to contact your administrator for additional information.
5. **Select your database**
The default name for your **Production** database will be **FLEETMATE**. The default name for your **Test** database will be **FLEETMATE_TEST**. Your Database Administrator may have configured your system differently, so you may need to contact your administrator for additional information.
6. **Click [Test Connection]**
This will verify your connection. If the test fails, you will need to contact your administrator for additional information and/or assistance.
7. **Click [OK].**
You will return to the initial window in the Data Migration Utility. Your SQL Server connection specifications should appear in the box labeled Target SQL Server Database. If any errors appear, stop and contact your Database Administrator or IT Support personnel for assistance.

After making these settings you will be returned to the initial Window. Click [**Next ->**] to continue to the second window.

CUSTOMER GUIDE: Installation

Once you click [**Next ->**] on the initial window, the second and final window will appear, and it will resemble the picture below.



Data Migration Utility – Second Window

This window lists all tables that will be migrated, and also gives you the ability to skip the migration of specific tables. Migrating all tables is *recommended*. However, if you have a specific need to skip migrating certain data tables, this window gives you the opportunity to do so.

IMPORTANT – DO NOT migrate the same data more than once. In some cases, this can result in duplication of data.

To begin the data migration process, click the [**Begin**] button.

The migration process will take anywhere from a few minutes, to several hours to run. A moderately sized database will take less than 30 minutes to migrate. The time required depends upon the volume of data in your original database. Make sure you have adequate time available before beginning. A percentage indicator will be displayed for each table, to indicate the progress of data that table.





CUSTOMER GUIDE: Installation

DO NOT interrupt the migration process once it starts.

If any errors occur during migration, these errors must be investigated to determine the cause, and to assess whether the errors were critical.

If an error occurs while a table is being processed, all records written will be **rolled-back**. This means that if you have 100 vehicle records and an error occurs on vehicle number one hundred (100), none of the vehicle records will be migrated. This is done to give you an opportunity to re-migrate the single table once the data issue has been identified and corrected.

Icons are used on this window to indicate table migration status as follows:

-  **OK** – table was migrated successfully with no errors.
-  **OK** – nothing was done, usually because there were no source records to migrate.
-  **Pending** – the table has not yet been processed.
-  **Error** – an error occurred during processing. This condition must be investigated and corrected before attempting to re-migrate the table.

Once the migration process completes you can print a listing of the tables with status information by clicking the **[Print...]** button.

Otherwise click the **[Close]** button to return to the initial window, and then click **[Exit]** to close the Data Migration Utility.

If errors occur while migrating a core table (e.g. Vehicle), you can expect many errors to follow. This is because there are relationships in your database that rely on *parent* records.

If errors occur during migration, or if bad/incorrect data was migrated, it is often easiest to delete the database using SQL Server Management Studio, re-run the creation script, and start the migration process once again with the corrected source data.

CUSTOMER GUIDE: Installation

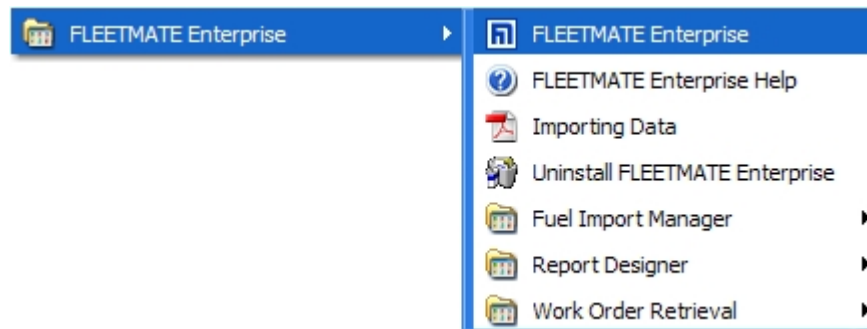
4 – Starting FLEETMATE Enterprise Edition



For your convenience, a **FLEETMATE Enterprise** shortcut was installed on your Windows Desktop. This enables you to start FLEETMATE Enterprise 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 your **Start** button
- Position your mouse over the **All Programs** group. The All Programs menu will expand.
- Position your mouse over the **FLEETMATE Enterprise** program group (see picture below)
- Click the **FLEETMATE Enterprise** shortcut.



FLEETMATE Enterprise Program Group

CUSTOMER GUIDE: Installation

Network Administrator Notes:

When using FLEETMATE via remote access (e.g. **Terminal Server** or **Citrix**), edit the FLEETMATE Enterprise shortcut target to *<installation-path>\fmee32.exe*. This will avoid startup issues that may occur due to an installation location other than C:\Program Files\FLEETMATE Enterprise. Set your startup location to *<installation-path>*.

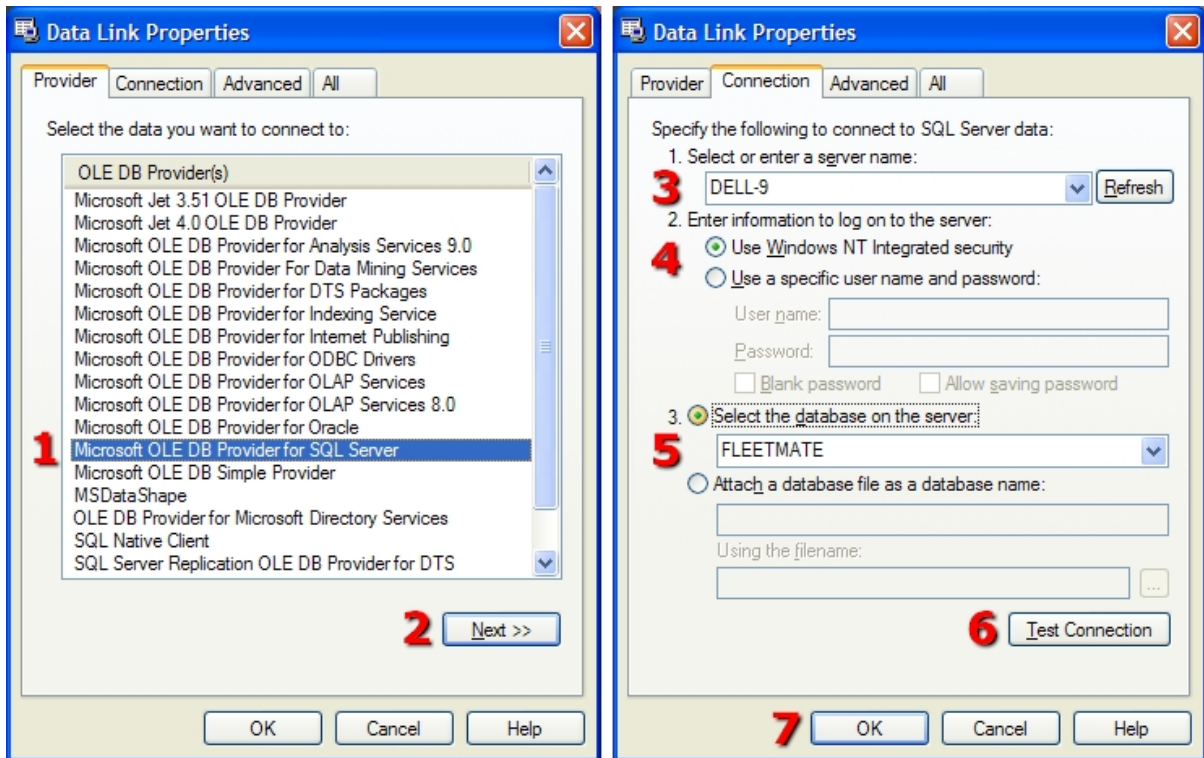
When running FLEETMATE on **Windows Vista**, we recommend that you right-click your FLEETMATE shortcut, choose **Properties**, click the **Compatibility** tab, check the box labeled **Run this program as an administrator**, and then click OK. This will avoid having certain external files stored under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

CUSTOMER GUIDE: Installation

FLEETMATE Initial Startup

When you initially start FLEETMATE Enterprise Edition, it has no idea where your database file is located, so you will need to specify the database you wish to use.

This process is done via the standard Windows Data Link Properties dialog, pictured below. Once this is set, FLEETMATE will remember the last database used between sessions.



Opening a FLEETMATE Enterprise Edition Database

The steps required are numbered above in red. Simply progress through these steps to select the FLEETMATE Enterprise Edition database you wish to open. These steps are covered in more detail on the next page.

CUSTOMER GUIDE: Installation

Data Link Properties Dialog – Steps

1. **Select the OLE DB Provider**
Choose **Microsoft OLE DB Provider for SQL Server**
2. **Click [Next >>]**
3. **Select the Server**
This is the server where your database resides. Contact your Database Administrator if you do not know the server name.
4. **Select the login method**
Integrated Security (first option) is the *default* method. Your Database Administrator may have configured your system differently, so you may need to contact your administrator for additional information.
5. **Select your database**
The default database name will be **FLEETMATE**. Your Database Administrator may have configured your system differently, so you may need to contact your administrator for additional information.
6. **Click [Test Connection]**
This will verify your connection. If the test fails, you will need to contact your administrator for additional information and/or assistance.
7. **Click [OK]**.
This will open your selected database.

If any errors appear, stop and contact your Database Administrator or IT Support personnel for assistance.

CUSTOMER GUIDE: Installation

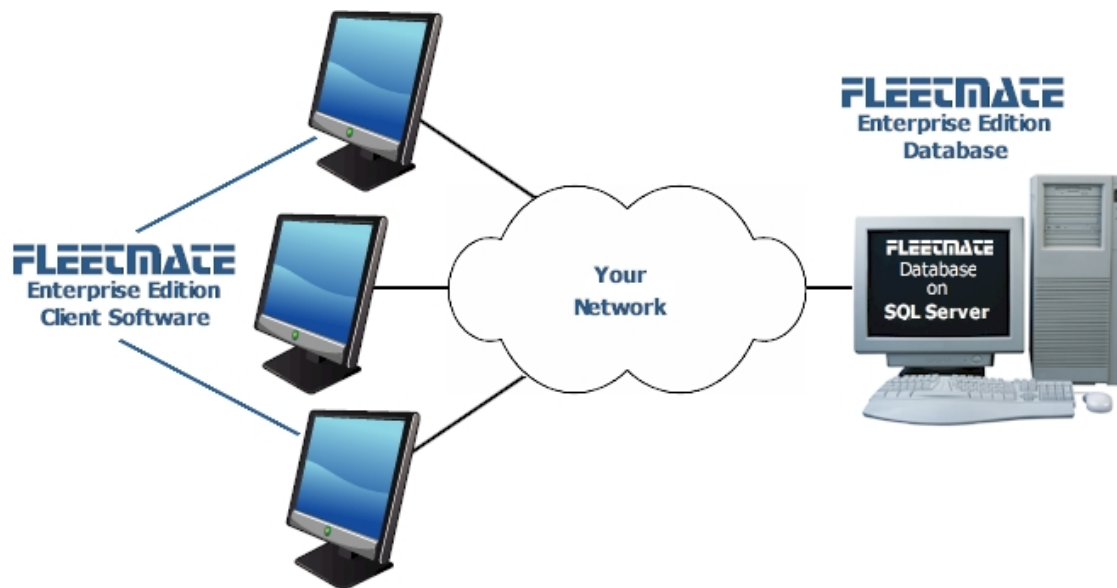
FLEETMATE Network Installation - Basics

FLEETMATE Enterprise will perform best with a 10/100 Mbps hardwired network connection to the database server. For use at remote offices, we recommend using a product such as **Windows Terminal Server**, **Citrix®**, or **GoToMyPC®** for remote connectivity.

If you need multiple users to access shared fleet information, you'll need to install FLEETMATE Enterprise on each PC at which the software will be used using the **fmeesetup.exe** installation program. Your database resides separately on Microsoft SQL Server.

User Account Permissions

Permissions will need to grant full rights to the **C:\Program Files\FLEETMATE Enterprise** 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 select the Enterprise Edition database to use. Afterwards, FLEETMATE Enterprise will automatically re-open the last used database between sessions.

CUSTOMER GUIDE: Installation

CUSTOMER GUIDE: Installation

If you use Windows Integrated Security to provide each user access to the FLEETMATE Enterprise database, each user account will need to be adjusted to also provide access to the database. Each account will need to grant permission to perform the following database functions:

- Add/Insert
- Update
- Delete
- Execute

If you need any assistance with FLEETMATE Enterprise Edition, please write to us at support@fleetmate.com or call us at **410-282-3603** (weekdays, 9 AM to 5 PM EDT) and we will be glad to assist you.

Thank you once again for choosing to install FLEETMATE!