
CUSTOMER GUIDE: Installation

Welcome

Thank you for choosing to install FLEETMATE: low-cost fleet maintenance management software that will help you:

- Minimize equipment downtime due to unexpected breakdowns
- Maximize asset availability by helping to keep your fleet assets properly maintained and running right.
- Improve Operational Efficiency and reduce your use of paper

Security and Your Confidential Information

FLEETMATE does not collect or transmit any personal information across the Internet. Data that you enter remains within your FLEETMATE database.

In cases of sensitive information, such as your email password, should you choose to use the email features in FLEETMATE, this type of information is stored in your database using industry-standard encryption methods. This prevents discovery of that information by unauthorized personnel.

FLEETMATE does not collect, store, use, or transmit banking information or any other sensitive financial information.

Updating Your Existing FLEETMATE Software?

If you already have FLEETMATE installed and need help updating your FLEETMATE software to the latest release, please proceed directly to page nine (9) in this document.

CUSTOMER GUIDE: Installation

Overview

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.

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 Instructional Video Lessons**. This collection of videos will cover many of the features offered by FLEETMATE, and will actually demonstrate how they work. These videos can be very beneficial by helping you grasp the basics as you begin to use FLEETMATE.

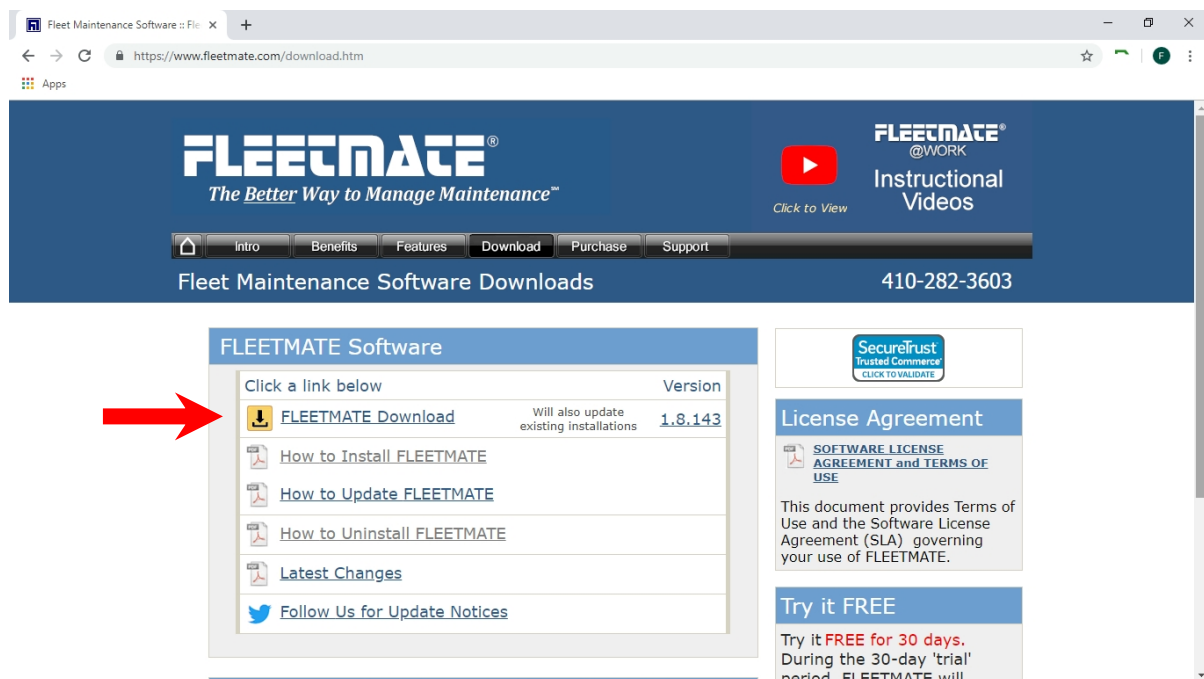
If at any time you experience difficulties installing or using FLEETMATE, please write to us at support@fleetmate.com for assistance.

CUSTOMER GUIDE: Installation

Download

The first step in the installation process is to download FLEETMATE from the FLEETMATE Website. To do this, first click the **Download** button to navigate to the Download page as pictured below.

Next, click the **FLEETMATE Download** link to begin the download process.



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 immediately from the Web, and proceed through the installation process that is covered on the next page. This is the quickest and easiest approach.

As an alternative, you can choose Save and choose a convenient location on your disk to save the fmsetup.exe installer file. You will then later double-click on the fmsetup.exe file to actually install FLEETMATE.

If you are **updating** an existing FLEETMATE installation, skip to page eight (8) in this document.

CUSTOMER GUIDE: Installation

Running the Installer – Initial Installation

If you chose Run after clicking the FLEETMATE Download link on the Web, proceed to the next paragraph. Otherwise, locate the fmsetup.exe file that you saved earlier, and double-click on it to open the installer.

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 End-User License Agreement in order to proceed.

After accepting the End-User License Agreement, you will see a Choose Destination Location dialog. The default location will be C:\Program Files (x86)\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 Program Manager 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 actual installation.

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.

As a default, your FLEETMATE database will be located in the **C:\Users\Public\FLEETMATE** folder on your local disk.

CUSTOMER GUIDE: Installation

Starting FLEETMATE



A FLEETMATE shortcut was installed on your Windows® desktop during the installation process. 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 **Start | All Programs | FLEETMATE** program group to start FLEETMATE. Simply click the FLEETMATE shortcut.

Network Administrator Notes:

When using FLEETMATE via remote access (e.g. Windows Terminal Services or Citrix®), make certain that you run the installer while your server is in install mode. Refer to the last page in this document for additional information.

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.

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 trial period is yours to keep. It will remain in your database. Even if your 30-day 'trial' period expires, your data still remains in-place.

Close FLEETMATE when it is Not in Use

-  Be sure to close FLEETMATE at the end of each business day. This will avoid the possibility of unauthorized access to your FLEETMATE data.

CUSTOMER GUIDE: Installation

FLEETMATE Network Installation - Overview

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

FLEETMATE will require a 100 Mbps (or faster) hardwired network connection to each PC. For use at remote offices, we recommend using a product such as Windows Terminal Services or Citrix® for remote connectivity. This will avoid any potential network bandwidth issues.

A wireless network connection to your database file (e.g. 802.11x) is not recommended. Use a hardwired connection or run FLEETMATE via RDP.

You will need to create a shared folder on a file server that will be used to store your FLEETMATE database file. We recommend that you name the folder "FLEETMATE", so that it is easily identified. You can then copy your current FLEETMATE database file from the C:\Users\Public\FLEETMATE folder on your PC disk, to the folder that you created on your file server

User Account Permissions

i Each user account defined in your Windows operating system must grant **Full Control** to the shared folder on your file server where your database is stored. You may need to contact your IT personnel for assistance.

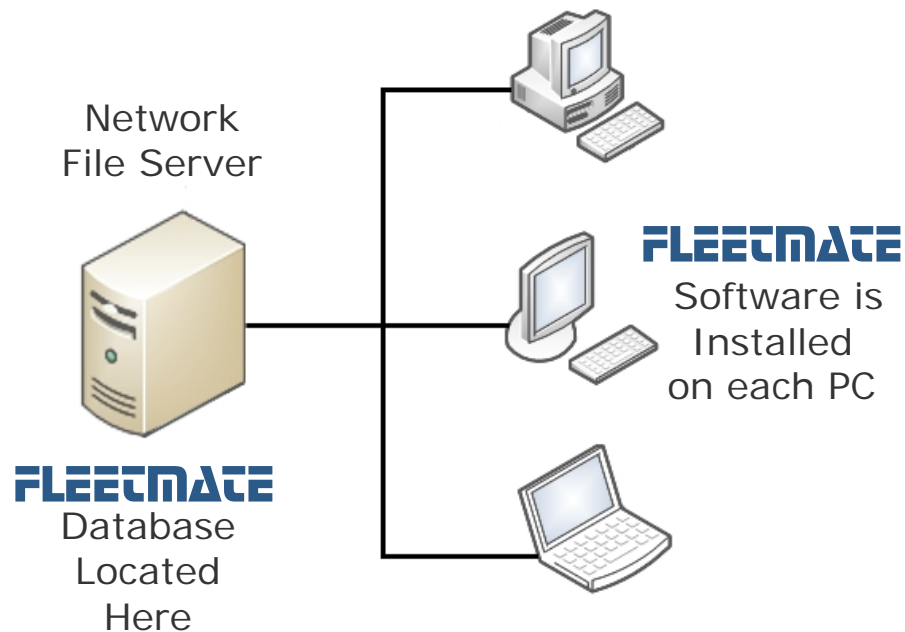
Mapped Drive

We recommend that you setup a *mapped drive* to the shared database folder so that each user can easily identify and access the shared database file on your file server.

CUSTOMER GUIDE: Installation

FLEETMATE Network Installation

FLEETMATE is very easy to install and use within a local area network environment. It really is as simple as the diagram below illustrates.



Basic Local Area Network Configuration

Opening your Database on Your File Server

Each user will need to use the File | Database | Open... menu function one time to open the database on your file server.

FLEETMATE will *remember* the location of the last-used database between sessions. This means that you will not need to re-open the database manually each time you start the program. It is automatic.

CUSTOMER GUIDE: Installation

Updating Existing FLEETMATE Installations

If you have a prior version of FLEETMATE already installed, you will need to update each PC on which FLEETMATE is installed. If you are running FLEETMATE remotely using RDP sessions, you will need to update FLEETMATE on your Windows Terminal Server.

You will need to shutdown all FLEETMATE sessions before proceeding with the update process below.

Please follow these steps:

1. Run the fmsetup.exe file on each PC (or on your Windows Terminal Server). Do not start the latest version of FLEETMATE until the latest release is in-place on your PCs, or on your Windows Terminal Server.
2. Start one (1) FLEETMATE session. This will allow the software to update its database to the latest format. Do not start any other FLEETMATE sessions 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:

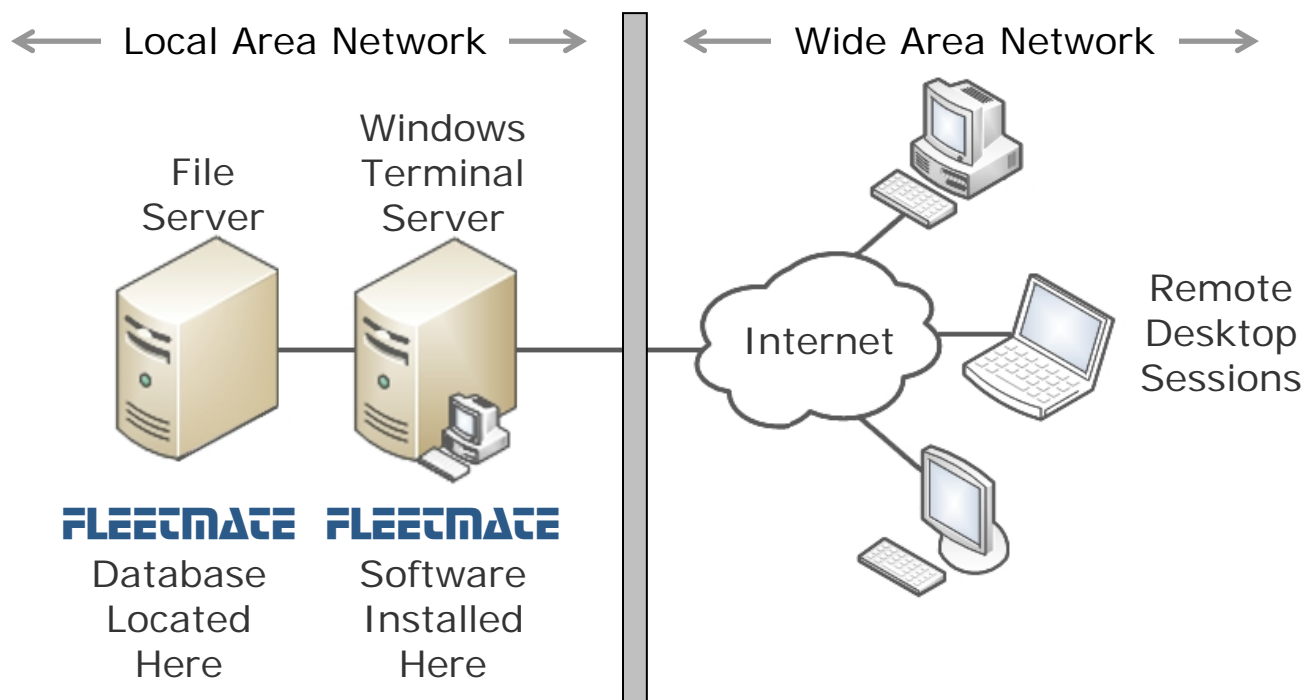
- a. Open the User Administration window, click the Clear Session Table button, and then close the User Administration window.
 - b. Exit FLEETMATE and then restart it.
 - c. If a Database Repair notice does not automatically appear, run the repair process manually using the File | Database | Utilities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

CUSTOMER GUIDE: Installation

Windows Terminal Server Installation

Windows Terminal Services enables users to use FLEETMATE from remote locations, while providing excellent responsiveness and performance. Once Windows Terminal Services is setup, the only other requirement is an Internet connection. You will need to contact your IT personnel to have this type of configuration established.

The diagram below illustrates the basics of this type of configuration, and shows you where FLEETMATE and your FLEETMATE database is located.



Windows Terminal Server Configuration

The gray bar in the diagram represents the boundary of your Local Area Network, which is often confined to your main office building.

The Remote Desktop Sessions relay FLEETMATE screens, keystrokes, and mouse activity to/from FLEETMATE, which is actually running on your Windows Terminal Server at your main office. Data traffic is confined to your Local Area Network.

CUSTOMER GUIDE: Installation

Windows Terminal Server Installation

Windows Terminal Services uses a special installation mode for installing applications for multi-user remote access. This mode is activated by installing FLEETMATE on your Windows Terminal Server through the Control Panel | Add/Remove Programs applet.

On later (more recent) releases of Windows Terminal Services, you may see a Control Panel wizard for installing an application on Windows Terminal Server. Refer to your Windows system documentation for the most recent operating system features and instructions.

An alternative approach will be to perform the installation from a command prompt at your server as follows:

1. Open a command session.
2. Enter: **Change User /Install [↵]**
3. Execute the "fmsetup.exe" installer (or fmeesetup.exe for the Enterprise Edition).
4. Enter: **Change User /Execute [↵]**
5. Exit the command session.

A FLEETMATE registration key is stored under each user's profile. This means that each user will need to enter the registration key one-time to register the software for their use.