

Networking

The single licensed version of Pathagoras is fully functional while working in a standard networked environment. Whether you have a single or a multi-licensed version of Pathagoras, SmartPaths (profiles) and document assembly books (folders and glossaries) and libraries can be located anywhere on your computer or anywhere across your network. So long as the file or folder is otherwise accessible to your computer, you can use it with any version of Pathagoras (including single-license versions) with no special setup.

However, if you have purchased a 3-pack or greater of Pathagoras, you are automatically eligible for the following additional networking features of the program:

- a. You can share profiles and libraries that you have create other users. Use the buttons found on the Networking Tools tab under 'Utilities/Settings'.
- b. You can accomplish future upgrades via the '*SmartUpgrade*' feature. One user on the network must still download and install the 'full upgrade' one of your computers, but the remaining users are automatically notified that an upgrade is available and quickly updated after the user gives permission.)
- c. You can share InstantDatabase 'masks' and 'personal data' information.

Step 1: Install Pathagoras and Enable Network

Typically, you must download and install Pathagoras separately on each computer, as if each were a stand-alone installation. (If you have a larger installation, ask Pathagoras Customer support about the various auto-install devices that are currently available to enable system wide 'push' distribution of the program.)

Once you have installed Pathagoras onto each computers (please, no more installations than licenses purchased) you are then ready to *enable the Pathagoras network*.

1. Go to 'Utilities/Settings' (found in the Pathagoras drop-down menu) and click the 'Networking Tools' tab (shown below).

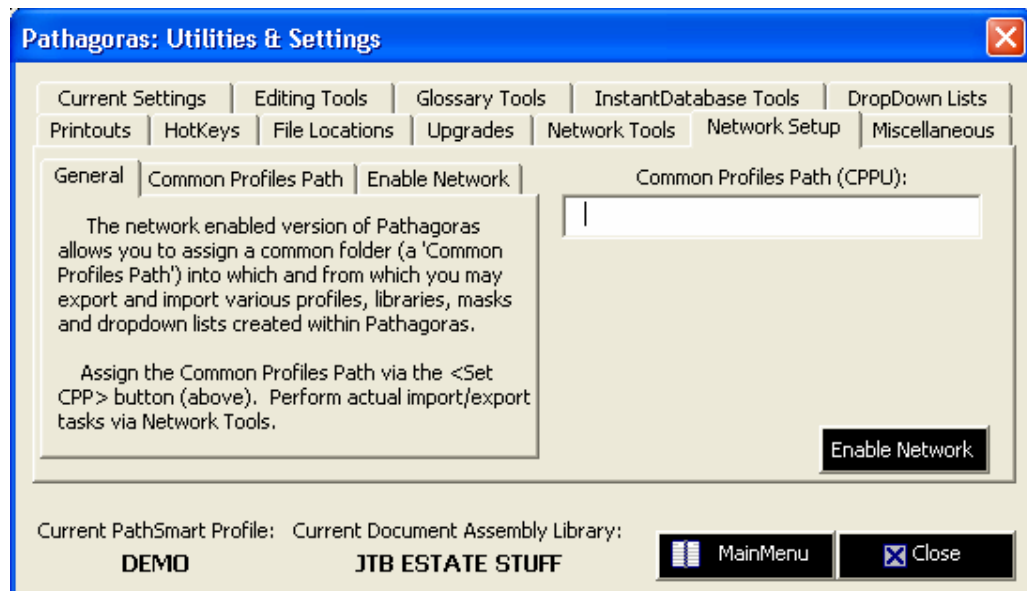


Figure 1. Network Setup Screen

2. Click <Enable Network> (lower right hand side of page). When prompted, type into the popup screen the unlock code that you have been provided. Your unlock code was sent to you by separate correspondence. If you do not have it, write us and we will generate another code and sent it to you.

Step 2: Establish a Common Profiles Path

After networking has been enabled, you should establish a Common Profiles Path (CPP). Each computer will eventually be pointed to that path. Setting the CPP is done on the same screen you used to enable the network. (Note that the screen also has 'Help' to explain what the CPP is all about.)

1. Display the 'Network Tools' tab in the Utilities/Settings screen (from the Pathagoras drop down menu). Same page as above, but new information and options now display:

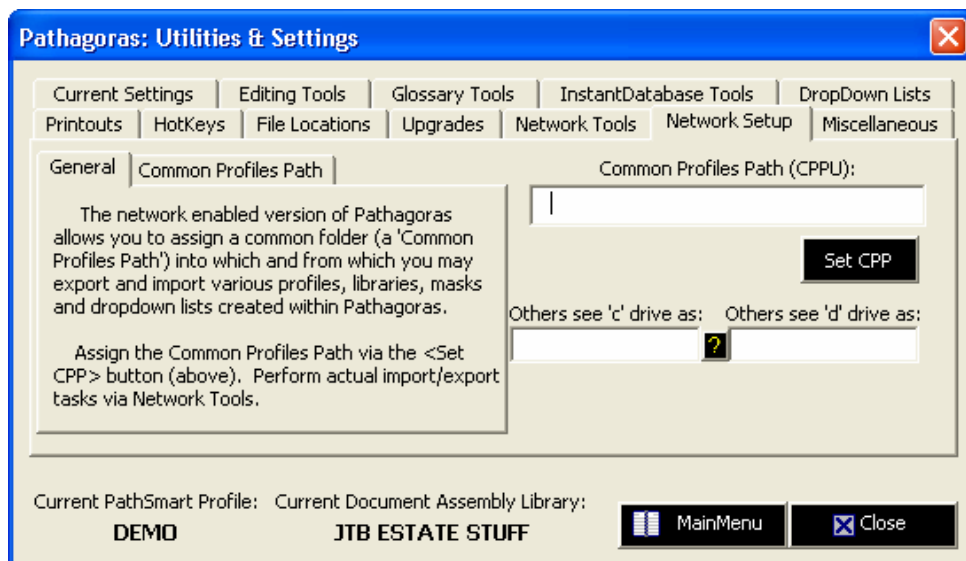


Figure 2. Network Setup Screen (after password provided)

2. If you have not already done so, click the <Enable Network> button and provide your Networking passcode.
3. Click the <SetCPP> button. Following the prompts, navigate to the folder that you want to be your Common Profiles Path (CPP). You can create the CPP folder 'on the fly' as you are navigating to your ultimate destination. We suggest creating and using a folder called "PathagorasCPP." The CPP should be on your file server or other location accessible by all users. (Don't forget that if, in the process of assigning a CPP, you create a new folder, you must click on the new folder to be 'inside' the folder before you take the next step.)

Note: The CPP can be anywhere, but there can be only one CPP on the network for the networking features to work properly for your entire system. The CPP is nothing other than a folder to which the other computers on your network will refer for information, data, etc.

NOTE: Nomenclature can be everything. The reference to the CPP should be to the 'full' network name (which typically starts with \\(servername)\(c_drive)\) This is as opposed to a lettered drive which begins like this: "f:\." When you are browsing to the CPP, use the My Network Places option to navigate to the CPP, not "My Computer."

4. Click <Save> once you are 'inside' of the CPP folder.

5. Write down on a piece of paper the path to the CPP folder. The path will display in the textbox next to the <SetCPP button>. This will be for the benefit of those (including yourself) who will need to navigate to the CPP in order to map it for other computers .

Repeat the above steps for each computer on the network for which you have purchased a license. Exception: Instead of *creating* a Common Profiles Path for the second and subsequent installs and setups, simply navigate to the CPP.

Step 3. Using the networking features.

Sharing profiles and libraries with others on the network.

Let's assume that you have mapped an ideal Profile (definition: a collection of SmartPaths in the document management system). Or perhaps you have created the 'perfect' Library (definition: a collection of selection of books --glossaries and/or folders -- for document assembly purposes). Let further assume that you want to share what you have created with others on the network. That way, they don't have to manually create the same setup. You should *upload* your masterpieces to the Common Profiles Path (the CPP). Here are the steps:

1. Click Utilities/Settings>>Network Tools to display the Network Tools screen (below). Make sure the Profiles option circle is filled (here you are sharing a Profile -- a collection of SmartPaths, not a Library -- a collection of books).
2. Choose whether you want to view the items in the Common Profiles path (which you would want to do if you want to download someone else's work from the CPP) or to view items in 'My Computer' (which you would want to do if you want to upload your work to the CPP). Not the elements on the screen that automatically change based on your selection to reflect the above discussion.

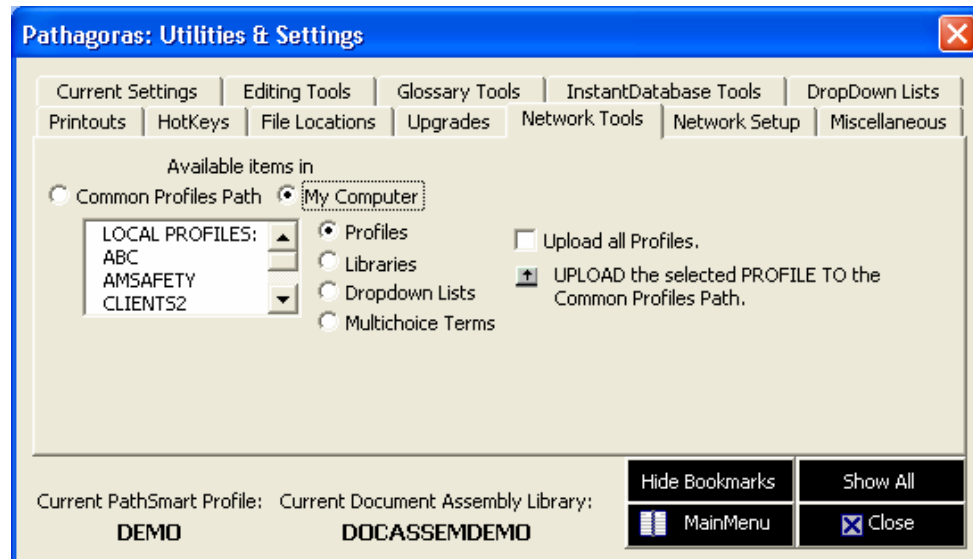


Figure 3. Network Tools Screen

- Continuing with the example, press the up arrow (UPLOAD) to transfer a copy of your work up to the CPP.

Downloading profiles and libraries from the Common Profiles Path

- Other users on the system, jealous of your accomplishments, and desirous of the work you have uploaded to the CPP, can not get your 'stuff' in almost the same fashion.
- Display the "Network Tools" screen.

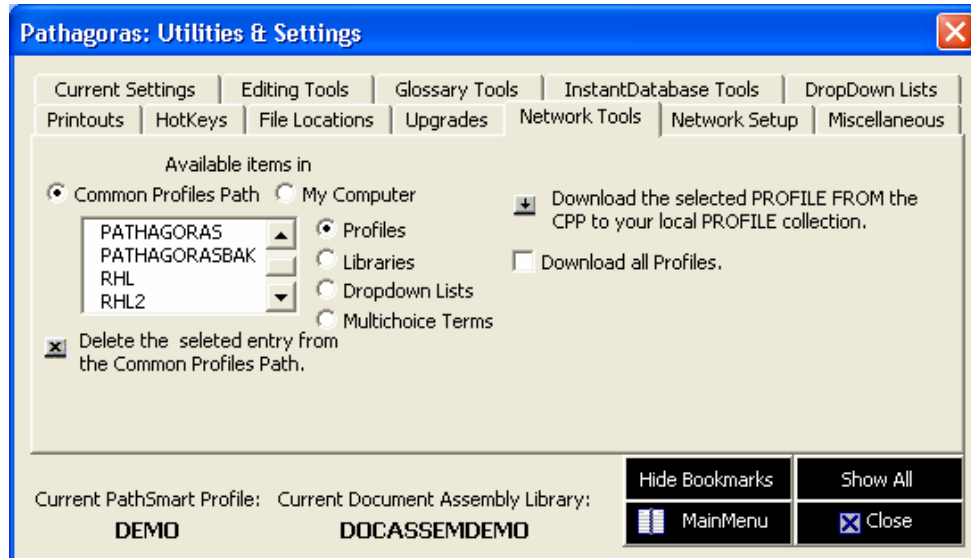


Figure 4. Network Tools, downloading a profile.

- Select the Common Profiles Path option and then select whether you are going for a Profile, Library, Dropdown list or Multichoice list.
- The list changes depending upon the selections made. Click on the item you want to transfer and then click the Download button. The transfer occurs instantly.

IMPORTANT NOTE: Be mindful and aware of relative and specific folder references. If the uploaded **profile** or **library** refers to the original author's *local* computer, e.g., "C:\office forms\contracts," the user on the download machine will have to adjust. Using PathSmart>>Settings, edit the profile to reflect the correct *network* path to the author's computer, e.g., "G:\office forms\contracts" or "\\station5\c-drive\office forms\contracts".) (This can be somewhat avoided on the upload side by using 'universal' path references where possible.)

Definitions:

Common Profiles Path: The 'Common Profiles Path' (CPP) is a Windows folder through which common data (user profiles and libraries, masks or dropdown lists) can be store for others to access. During the initial setup process, you will be asked to designate a CPP. Typically you would locate the CPP on the network server. However, the CPP can be any folder on any machine that others on the network can access.

InstantDatabase path: Pathagoras allows each user to save client and customer data used for the creation of documents. This data can be reused for different documents generated for the

same client. The data can be saved locally (and accessible only by the local user) or it can be saved on the network server so that it is available to all users. You will be asked in the install process to choose between 'local' and 'network' storage of InstantDatabase data.

Upgrading Pathagoras:

Periodically, Pathagoras is updated to provide new features, enhancement to existing features, or just plain bug fixes. Multi-licensed users can take advantage of the *Smart Upgrade* feature to avoid having to download separate copies of the upgrade package from the Internet. Here are the steps to perform when you receive an upgrade notice. (These instructions assume that all users on the network have properly installed Pathagoras and have activated the network functions. It also assumes that all users are pointing to the same Common Profiles Path.).

1. One user on the network should be assigned to perform a 'standard' upgrade from the Internet.
2. Close all open Word editing windows (but leave Word open). Also, if you use Outlook, exit Outlook. Click the <Download Upgrade Package from Internet> button from the Pathagoras>>Utilities/Settings>>Upgrade screen.
3. When prompted by your browser, chose to "SAVE" the upgrade file (it will be called "Pathagoras Setup.exe"), and then save it to your Desktop. (The desktop is typically the default 'save to' location for most browsers.) Pathagoras provides reminders and explanations about the importance of this step during the upgrade process.
4. Run Pathagoras Setup.exe from the desktop. Just before the install begins you will be asked to fully close Word. Do so (and close Outlook if you have not already done so.) Press OK to continue the install.
5. The next screens will be identical to those you have seen (license notice, user info, etc.) in previous installations of Pathagoras. When asked if you want the start Word after installation, say "Yes".
6. When Word reopens, you will be asked if you want to Transfer the upgrade to the Common Profiles Path and whether you want to notify other registered users of the update. Unless there is a reason to say "No," answer these questions "Yes." The final questions is "Remove Setup from Desktop." Again, unless there is a reason to say "No," answer "Yes." That is it.
7. The next time a registered user on the network begins a document assembly project, Pathagoras will advise that an update is available and ask permission to install it. Unless there is a reason to say "No," answer "Yes." (If the answer was "No," the remote user can later perform a "Smart Upgrade" from the Pathagoras>>Utilities/ Settings>>Upgrade screen.

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Pathagoras networking adds a whole new dimension to the operation of the program. If you have other suggestions for improving upon or adding to the networking features, please let us know.

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