

# Visual Portfolio Manager – Read Me!

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## Description

Visual Portfolio Manager (VPM) has been designed and produced by ByteDrive Ltd to offer three user modes.

User Levels:

- 0 VPM is initially installed at User Level 0, which offers prime functionality and includes over 100 letter templates. Data storage and printed output has not been restricted and subsequent migration to Levels 1 and 2 will not affect stored data or templates;
- 1 An annual subscription to a regular VPM newsletter allows registration of any number of workstations to a single Company Name for printed output together with streamlined user logon and additional features;
- 2 A one-off charge is made for each concurrent Level 2 user permission for secured databases, implemented through local or network 'Hasp keys'. This allows a VPM Master Administrator to control user access permissions whilst also protecting the database against inadvertent viewing by third parties.

**Note - Whenever compiling data within a database such as VPM it is suggested that you consult the relevant sections of any Data Protection laws applicable to your country and profession.**

... VPM Level 2 security has been designed to help professional users comply strongly with such regulations whilst simultaneously allowing simple and flexible system management.

## Initial Installation – VPM Workstation(s)

*N.B. The on-line Help files do not currently describe installation or that part of VPM's functionality controlled by the 3 User Levels of VPM.*

**Close all programs** and run the Setup.exe file found in the root directory of the VPM CD or of the installation file-set provided. (If Autorun is enabled the setup will start automatically).

Read the License Agreement before using the '**I Accept**' button to continue the installation (the License Agreement can subsequently be read or printed out from the CD's ... \documentation folder)

The default installation option (series 5 support files) will normally be selected unless the setup program detects the need for later series 6 support files (please see the accompanying Version.txt file for more information, which can be found in the support directory of the CD).

Follow the prompts until the program and the VPM icon group have finished installing, always accepting the default folder path where possible.

**NB.** *There is no difference between the 3 VPM Setups buttons, Typical, Custom and Compact!*

## Data Installation

For a standalone 'local' installation use the icons in the 'VPM' Program Manager group to install the 'VPM Clean Data' and/or 'VPM Sample Data' files accepting their default installation folders (clean data == blank working data files).

To position the database files on a chosen network PC or network Server, either install the VPM Program on that machine and continue with the data installation as above or run the Data Setup programs e.g. ...

\Setups\Data\Clean\Setup.exe *from* the chosen database server itself. Subsequently, each VPM Workstation will require to be re-connected to the VPM\_Current\_Data.mdb file positioned on the database server.

## Upon First Use

Run the Visual Portfolio Manager program and logon as the Default User! Using the VPM Switchboard's database tab to ensure that the correct database file is connected and then open the Employees form to enter Partner/Employee information for those using the program and then set an employee name as the current user. Create at least one Client record before opening your first new working Portfolio.

## Subsequently

VPM databases and VPM workstation installations are separate entities and no constraints are placed on their local or network placement, or the number of them. VPM data is characterised by its location folder, not by the database file names. All usable VPM databases consist of two files, 'VPM Current Data' and 'VPM Archive Data'. Should it be necessary, always move or rename this database pair together as a single entity.

Should it be necessary to start again with a 'clean/empty' database, this can be re-installed at any time from the original local source location The setup program **will not overwrite existing data** – it will be necessary to move or rename the original pair of databases unless a different destination is specified.

***N.B. If the Windows Explorer is used to distribute the clean or sample database pair from the VPM CD or installation file set this could result in overwriting data if care is not used. The data setup programs are provided to avoid this occurrence.***

A setup icon is provided for removal/re-installation of the local VPM workstation program. Updates will require re-installation from another VPM CD or VPM installation file set. If you experience the VPM support file version error message during startup consider re-installing the alternative support file version (V6).

## **Additional Notes**

If icons are not generated at installation time within a VPM Program group on the Windows NT4 platform it is suggested that users manually create at least one, pointing to the 'VPM\_Programme.mde' file in the install directory. A typical runtime command line ensuring correct operation is given below –

```
"C:\Program Files\Microsoft Office\Office\msaccess.exe" /runtime "C:\VPM\VPM_Programme.mde"
```

Also note that Windows NT may install the icons for data installation under the currently logged user's profile whereas the program icons should be found under the Common or 'All User' program group.

On all Windows platforms the aforementioned data installation icons will not be removed during removal of the VPM program from the VPM program group's Setup icon or if the control panel Add/Remove feature is used. If required, please delete these manually using the Windows Explorer.

Additional information:

Version.txt; License.txt

Together with this file (ReadVPM2.rtf), the above files can be found in the documents folder on the VPM CD.

## **Support**

If required please call the following premium rate telephone numbers for support

(044) 0906 - 7880101

(044) 0906 - 7160017

or go to either one of the following web sites :

[www.vimsltd.co.uk](http://www.vimsltd.co.uk)

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