



# CAB Local Information System Installation Guide



**Constructive  
IT Advice**

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# 1 Introduction

This document helps you install the desktop version of the CAB Local Information system developed by Constructive IT Advice for Epsom & Ewell CAB. It covers installation from scratch and making changes to your installation

The system comes with installation programs that allow you to install the system - and continue to manage it - without any special IT expertise.

If you plan to install the intranet version of the system you should start with the Intranet Installation Guide – you might not need to install the desktop version at all.

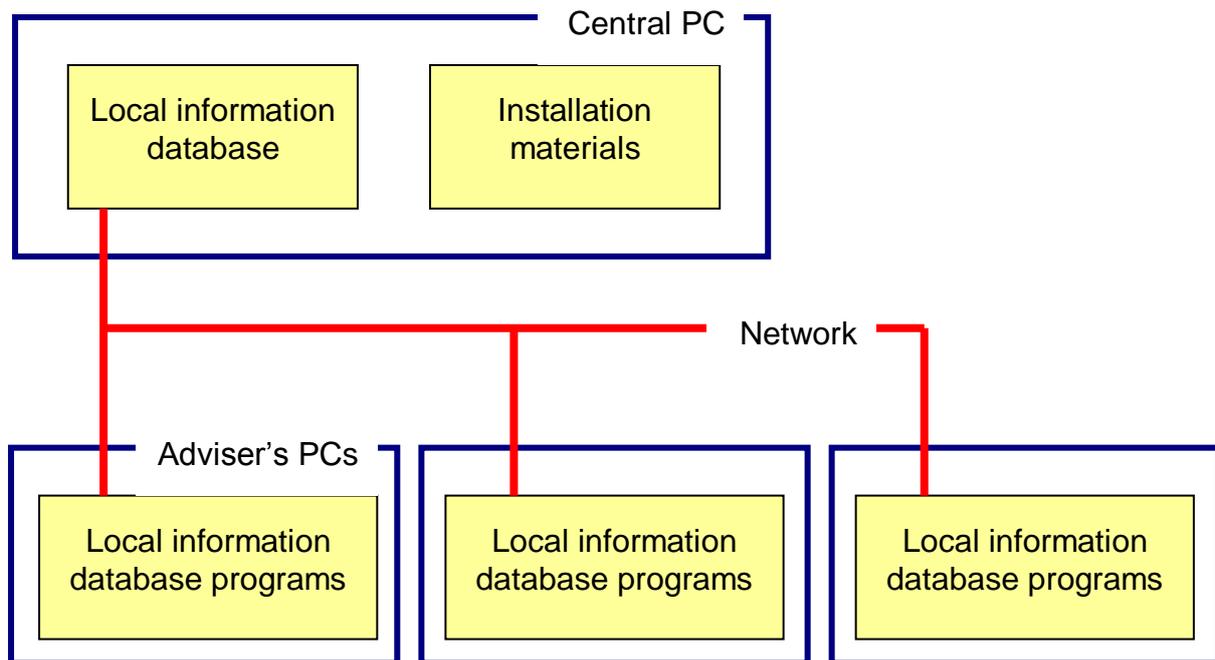
## 1.1 Features overview

The system supplements the CAB Electronic Information System by providing information about local contacts and resources likely to be useful to clients. It is designed to make it as easy as possible for you to find the information you need online without having to find data from paper files. The system will help ensure that data is as up-to-date as possible by linking directly to source material on the web and in your bureau. The system provides:

1. **An online index to the local information database.** The online index provides a sophisticated search and look up system, increasing the likelihood that you will find what you are looking for. For example, you can search for index entries containing words you are looking for. The electronic index also supports multiple index entries for the same item so, for example, you can identify organisations by both acronyms as well as their full names.
2. **Information about contacts and resources.** The database contains textual information that will help advisers in their dealings with clients. Text can be formatted to make it easier to read. For example, it can include bullet points.
3. **Links to local information.** The database supports different types of link:
  - a. The database can link directly to supporting information held in web sites. Clicking any link will take you straight to the relevant web page. The database comes with a utility that regularly checks web links to make sure they are still valid.
  - b. Document links. These work in the same way as web links except that they refer to documents held in your local network. For example, a database entry might link to a local policy document written in Word. The database will automatically run the right application to show you the linked document. Again, document links can be checked regularly to make sure they are still valid.
  - c. Paper file links. Some documents are difficult or inappropriate to store electronically. In these cases the database can provide a reference to a paper file.

The system is designed to be easy and straightforward to use, and does not require users to have specific IT expertise - although a knowledge of web browsing will be helpful.

## 1.2 Configuration overview



This diagram shows how the basic local information system works.

The central PC holds the local information database on behalf of all the PCs in the network. The chances are you already have a server that holds data shared between users of your network. You would normally put the local information database on this server.

However, ***you do not need a server to run the local information system***. Any PC on your network can be the central PC provided it is set up to share files<sup>1</sup>.

You can have as many PCs as you like sharing the same database.

## 1.3 Alternate configurations

When designing the system, we considered other ways to use it. Specifically we allow for:

- People that need to use laptops to run the local information system while outside the office
- People that want to try a stand-alone version of the system to experiment and see what the system has to offer before installing it in their office.

We also provide a web-based version of the system that allows advisers to get information from the database using a web browser. We provide a separate installation guide for that software under the 'Intranet' folder on the install media. That version still requires you to install at least one copy of the desktop software to allow you to update entries in the database.

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<sup>1</sup> Right click the folder that will contain the database and click 'Sharing and security' to set the folder as a shared folder on the network

## 1.4 Making changes

The trouble with having several PCs all running the system comes when you want to make a change to the software. You don't want to have to go to each PC to update it. Instead, we provide a program that looks to see if there are any changes each time someone runs one of the main programs. If there is an update to be done, it implements the change automatically. You don't have to visit each PC. A simple change at the central PC is all you need to roll out a change across all the PCs.

## 1.5 Operating software

To run the local information system, PCs must have Windows 10, Windows 8, Windows 7, Windows Vista, Windows XP, Windows NT, Windows Me or Windows 98. It's OK if you have a mix of these operating systems in your network.

The local information system is written to use the Microsoft .NET framework - which is software provided by Microsoft for free.

There are several versions of the .NET framework:

- Version 1.0 - the original version that was superseded by version 1.1.
- Version 1.1 - this is the most widely-installed version. If your PCs are a few year's old, or less; there's a good chance they will already have version 1.1 installed.
- Version 2.0 and later are subsequent versions of .NET but act as entirely separate products to version 1.1.

Currently, the local information system requires Version 1.1 of the framework. Intuitively you might think later versions are upgrades to version 1.1 so the local information system can use them too. That's not right. You must install 1.1 even if you already have a later version. There's no problem having multiple versions installed at the same time. The installers for .NET 1.1 and supporting data access software are available for free from the Microsoft web site; we provide links at [www.SeeITA.com/CAB/Downloads.shtml](http://www.SeeITA.com/CAB/Downloads.shtml).

The only other operating software you need is Microsoft Internet Explorer version 5.01 or later.

## 1.6 User types

Windows 10, Windows 8, Windows 7, Windows XP and Vista support three types of user:

1. Administrators - have full access to the programs and data held on the PC
2. Limited users - can run programs and change their own data but cannot:
  - a. Change programs
  - b. Access other people's data
  - c. Make changes to XP and its configuration.
3. Guest users - who can't do much at all.

The system stores user-specific information in locations available to limited users so it does not require administrator access for normal use. If you use Windows 10, Windows 8, Windows 7 or Vista, the system will not invoke User Account Control in normal use.

Note, however, that limited users cannot change programs. They can run the local information system programs, but not change them. If you decide to implement limited users, you will have to switch to an administrator id in order to install the system and to make any subsequent changes. The local install program detects when there is a program change but the user has insufficient access to install it. In this situation the install program displays a message explaining that administrator access is needed. The local information system will then be disabled on that PC until the program update can be completed.

When using Windows 10, Windows 8, Windows 7 and Vista it is not sufficient to be using an Administrator id, however. You must also invoke administration rights when running a program using the “Run as administrator” option. You are prompted to do that in the attached worksheets.

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## 2 Deciding what to do next

We have provided a number of worksheets designed to take you through a variety of scenarios you are likely to encounter.

This section helps you decide which worksheets you need.

The worksheets are provided in appendices to this document. Each worksheet starts on a new page so you can easily print them out if you want.

Please let us know if you have a situation that we haven't covered here.

### 2.1 I am installing the system for the first time

To set up the system from scratch, use the following worksheets:

1. A - Installation planning
2. B - New install to the central PC
3. C - New install to a PC (you will need to use this worksheet with every PC you want to run the local information system)
4. G - Install to a laptop (if you want to run the system out of the office on a laptop).

### 2.2 I want to try out the system on just one PC

Start with worksheet 'F - Install to a stand-alone PC'. When you are ready to implement the system on your network, use:

- The 'I am installing the system for the first time' procedure if you have not created any useful data; or
- The 'I want to move the system to a different central PC' procedure if you have created some data that you want to keep.

### 2.3 I want to upgrade from version 1 to a later version

Version 1 of the local information system is the first version we released to bureaux. If the programs you are running show they are version 1.x (where x is a number) then you are running version 1.

Use the following worksheets:

1. D - Upgrade from version 1 to version 2 on the central PC
2. E - Upgrade from version 1 to version 2 on the PCs
3. G - Install to a laptop (if you want to run the system out of the office on a laptop).

## 2.4 I want to change configuration details

To change any of:

- the bureau name shown by the system
- the search engine used by the system
- whether you want the system to show document addresses to advisers, or not
- text to be substituted in document addresses
- the soft button actions...

... use worksheet 'I - Update configuration details'.

## 2.5 I want to release a new version of the programs

From time to time we will release new versions of the local information programs to improve them and to fix any bugs we find.

To release a change to the programs use worksheet 'H - Update your programs'.

NB:

1. If you want to upgrade from version 1.0 of the local information system to version 2.1, use the procedure described in section 2.3 instead.
2. Version 2.5 of the Local Information System addresses a problem introduced by Microsoft security checking. This caused the help files provided with the system to be blocked. If you are upgrading from a version 2.x system at version 2.4 or earlier and you encountered the blocking problem: use worksheet 'C – New install to a PC' to update the local installer. This will update the installer to unzip the help files from a zip file. We're hoping this will by-pass the security check.

## 2.6 I want to move the system to a new central PC

For example, your office might have bought a new server, and you want to move the local information database to it.

Use worksheets:

1. A - Installation planning
2. J - Move the system to a new central PC

## 2.7 I want to repair a PC's installation

For example, someone might have deleted one of the program icons or a key file needed by the local information system.

First try using worksheet 'K - Repair a PC setup'.

If you encounter problems, or if that does not fix the problem, use worksheet 'C - New install to a PC' to completely reinstall the local information system on that PC.

## 2.8 I want to make the best use of Internet Explorer

By default, Microsoft switches on emulation of IE7 when the Local Information System enquiry program uses it to display search results and internet pages. IE7 is now a very old version and it does not work well with modern web pages.

To change this behaviour requires a change to the Internet Explorer section of the Windows registry. We provide a tool to make that change. The tool can also change the way link checking software retrieves web pages.

Worksheet 'N – Make better use of Internet Explorer' explains how to use the tool.

## 2.9 Other tasks

You can find out about some other tasks, including:

- Creating and changing user ids and passwords for the maintenance program; and
- Repairing the local information database following a corruption...

... in the Technical Overview provided with this installation guide.

You can find out about capturing data from Excel spreadsheets, Word and Access from the Implementation Notes provided with this installation Guide.

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## Appendices

The following pages contain the worksheets referred to in section 2 of this document.

## Worksheet A - Installation planning

This worksheet might need you to apply some IT technical expertise because it involves setting up a folder on a central PC that is accessible by everyone in the network. Unfortunately, we cannot provide specific instructions for doing this because so much depends on how your network is set up. On the other hand, the task we describe is a relatively simple one for someone familiar with networking concepts. Please be reassured that the remaining tasks are more straightforward.

You need to decide which server or PC will be the one to store your local information database. This will be your central PC. See the diagram in section 1.2 for an illustration of the role of the central PC in the local information system.

If your office already has a network server (if you have one, you probably use it to store all your key documents), you should also use it as your central PC. That's because servers are designed for this kind of work. If you don't look after the server yourself, make sure that the person who does, knows what you are doing. Ideally, you should work through these worksheets together.

If you don't have a server, you can use any PC on the network as your central PC. If you have a mix of ancient and modern PCs, use a modern one if you can, otherwise the system might be too slow to be useful. Note that the central PC will need to be switched on whenever anyone needs to use the local information system. If you already have a PC that needs to be switched on throughout the day (perhaps you use it for storing documents or accessing a printer) then that would be a good candidate.

### The local information system folder

You need to create a folder on the central PC to contain the local information system database. If you do not look after the PCs, find out who does and ask them where they want to put this folder. That's important because:

1. People that administer PCs usually have a scheme they like to follow so they know where everything is
2. Choosing the right location will help to ensure your data gets backed up regularly (see below)
3. Choosing the right location could automatically make it available to other PCs in the network.

If you are not sure where to put the folder, we suggest you use a subfolder of the folder you use to store important documents. For example, if you use a folder called `s:\Documents`, then create the new folder as `s:\Documents\LocalInformation`.

## Security issues

Having created the new folder, you need to make sure it is accessible to all the PCs in your network that need to run the local information system. Go to a PC that is not the central PC, log on as a normal user, and make sure you can navigate to your new folder. Try creating a file in the folder; for example:

1. Right click in the directory
2. Click New and click 'Text document'

Try changing the file (for example, try double-clicking the text file, adding some text and then close and save the text file). Then try to delete the file you have just created (for example, right click the file and click Delete).

If you can't find the new folder or if you are prevented from adding, changing or deleting files, you will need to change your central PC's security permissions to allow access.

Note, you might think that it's unnecessary to allow people to change data in the folder if they don't need to change data in the local information database. However, the Microsoft data access software we use needs full access to the database folder - even if people are only reading the database.

Before continuing, write down the address of the folder you have created. We will refer to it later as the local information database folder. Note you probably have two ways to refer to the central PC:

1. **PC name.** Addresses have the format: \\<PC name>\<folder hierarchy>. For example: \\Server\Public\LocalInformation. This approach does not rely on network connections being created in advance. We therefore suggest you use it if possible.
2. **Drive letter.** Addresses have the format: <drive letter>\<folder hierarchy>. For example: P:\LocalInformation. This approach is simpler to use than the PC name method if you already have a drive letter set up that you can use. However, some networks lose drive letter assignments from time to time which would cause the database system to fail.

## Backup

**This is really important. Please don't skip this step or put it off to later.**

You need to be sure that your local information database folder and all its subfolders (the next worksheet will create the subfolders) are being backed up regularly. Otherwise you risk wasting all the work you put into creating and updating the local information database.

You also need to be sure that database copies are regularly taken away from the office. Otherwise a single incident, such as a fire, could destroy both your data and the backups.

At Epsom & Ewell, we use a belt and braces approach. We have included the local information database into our daily server backup procedure. Also, each day our local information administrator comes in, she makes her own backup and takes it away with her just to be sure.

## Worksheet B - New install to the central PC

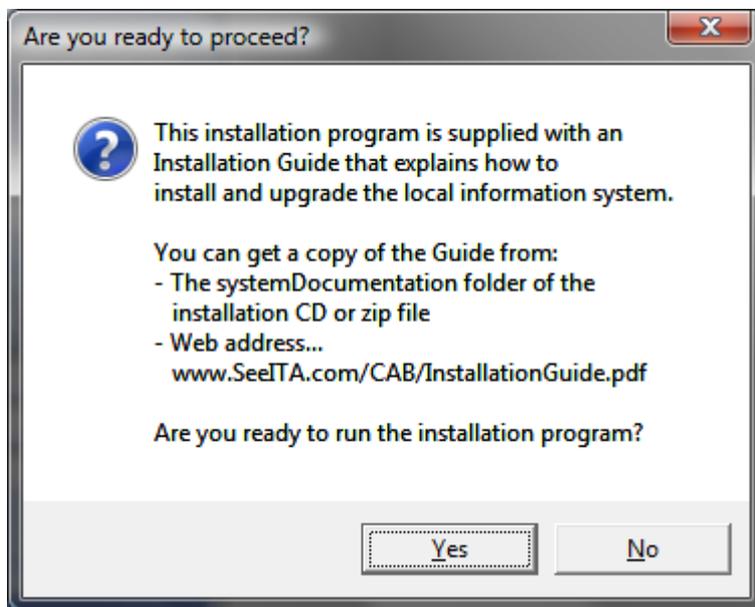
This worksheet helps you set up the local information system on the central PC. See the diagram in section 1.2 for an illustration of the role of the central PC.

Decide which PC you will run the install from. To avoid confusion over addresses **do not use the central PC to run the installation program**. Instead, you can use any of the other PCs that will run the local information programs. That way you can be sure the address you use for the central PC can be accessed from other PCs in the network.

Copy the Installation media into your chosen PC<sup>2</sup>.

Install .NET 1.1 - see page 65 for more detail. Install the Microsoft Access Database Engine - see page 68 for more detail<sup>3</sup>.

Double-click CABNetworkInstall.exe. It's in the top-level directory. You will see this screen:

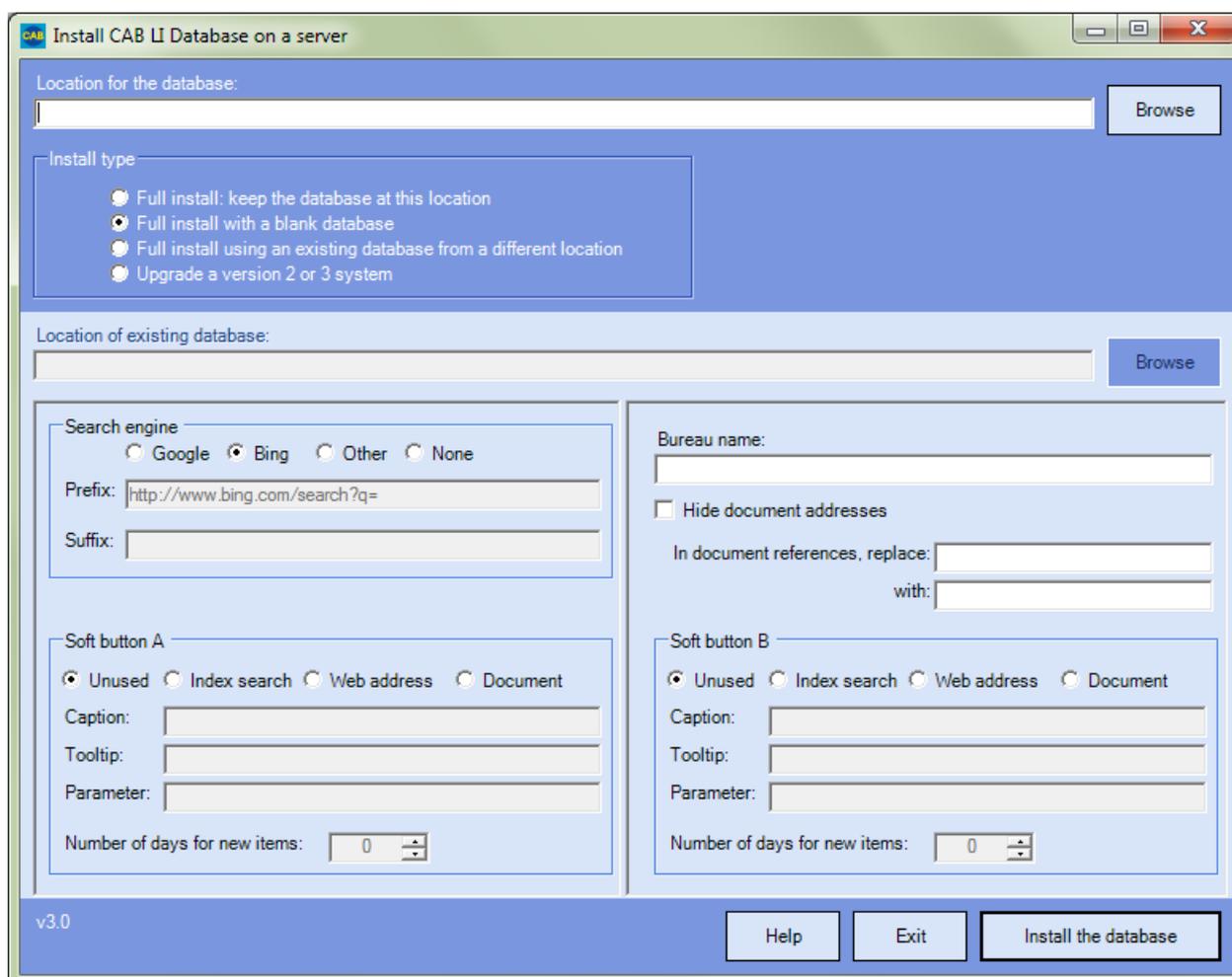


Click 'Yes' to go to start set up.

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<sup>2</sup> If it helps, you can copy the unzipped installation media to a memory stick and run the install program from there.

<sup>3</sup> You can skip installation of .NET and Microsoft Access Database Engine if you know they are already installed – you can run both installers from a memory stick.



Enter the full location of the database in the first box on the screen. Enter the folder name you wrote down earlier. Then type a “\” character if the folder name doesn’t already end with one. Finally type the database name. You can enter any name you want, but we suggest you stick to “LocalInformation.mdb” (without the quotes). So, if the directory is \\Server\Public\LocalInformation, you would enter “\\Server\Public\LocalInformation\LocalInformation.mdb”.

Decide which search engine you want to use. If you want to use something other than Bing or Google you will need to specify a prefix and, possibly a suffix. If you are not sure what to use, we suggest you click ‘Bing’ as it seems to us that it finds UK-specific information more easily than Google. To find out more about alternate search engines, click the ‘Help’ button.

Enter your bureau’s name in the ‘Bureau name box’. This will appear in the text shown when people start the local information database and in the heading of that screen. For example, we use “Epsom and Ewell”. By default, the system appends “Citizens Advice Bureau” to the bureau name. You can suppress that by adding a trailing “-” to the bureau name.

Check the ‘Hide document addresses’ box if you prefer not to show the full document address next to document links in the reader program. If in doubt, leave this box unchecked (you can change your mind later).

Leave the document references replacement boxes blank for now.

Decide whether you want to show 0, 1 or 2 soft buttons in the left hand pane of the reader program. Select the radio button corresponding to the action you want each button to take:

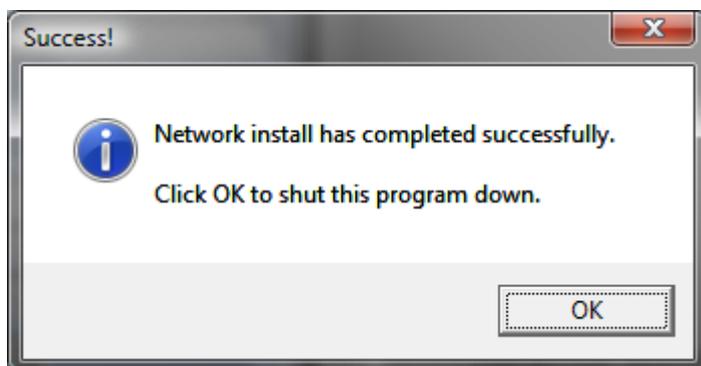
- **Unused.** The button will not appear in the reader program. You don't need to enter anything else for this button.
- **Index search.** The button will run a search on the database as if the user had entered one or more search terms and pressed the 'Search' button. For example, in Epsom & Ewell we create a 'Local news' button to list all entries containing the search term "adviser". This displays all entries relating to the bureau itself giving us a simple Intranet. Put the search term you want to use in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it. You will also need to define how many days back the program should look for new items when deciding whether to flash the button in red with the text "Recent update"; specify zero if you do not want people to be alerted to updates.
- **Web address.** The button will display a web page. That could be an often-used web page, or it could be a link to a page that displays a list of useful links. Put the address of the web page you want to show in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it.
- **Document.** The button will display a document from your network. For example, it might be a policy document or an attendance rota.

It is likely you will know of several web pages and documents that people will want to access frequently. You can put all these links into a single web page held in your network and point a soft button to it. To find out more, see worksheet M – Create a 'frequently used links' soft button.

If you are unsure how to use the soft buttons, set both to 'Unused'. You can activate them later if you want.

Now click 'Install the database'.

After a short while, you should see this message:



Click 'OK'.

You have completed this worksheet.

## Worksheet C - New install to a PC

Execute the following procedure on each PC that needs to run the local information system. That should include the Central PC if you want to use it to run the local information system.

There are a number of screens involved, but that's because the Microsoft installation routines are somewhat verbose. In practice, the process is a straightforward one.

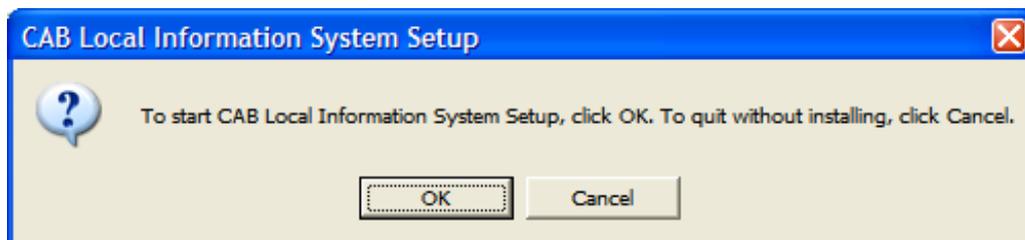
Do not use this procedure for laptops that need to use the local information system while outside the office. Instead use Worksheet G - Install to a laptop.

If you use Windows NT, XP, Vista, Windows 7, Windows 8 or Windows 10, you will need to log in to the PC as an Administrator. If you are unsure what that means, try the install anyway. If you see security error messages, you should make sure you have administrator status before trying again.

Copy the Installation media into your chosen PC<sup>4</sup>.

Install .NET 1.1 - see page 65 for more detail. Install the Microsoft Access Database Engine - see page 68 for more detail<sup>5</sup>.

If you are running Windows 10, Windows 8, Windows 7 or Vista, right click Setup.exe and click 'Run as Administrator' and confirm your authorisation to the User Account Control (UAC) screen. Otherwise, double-click Setup.exe.



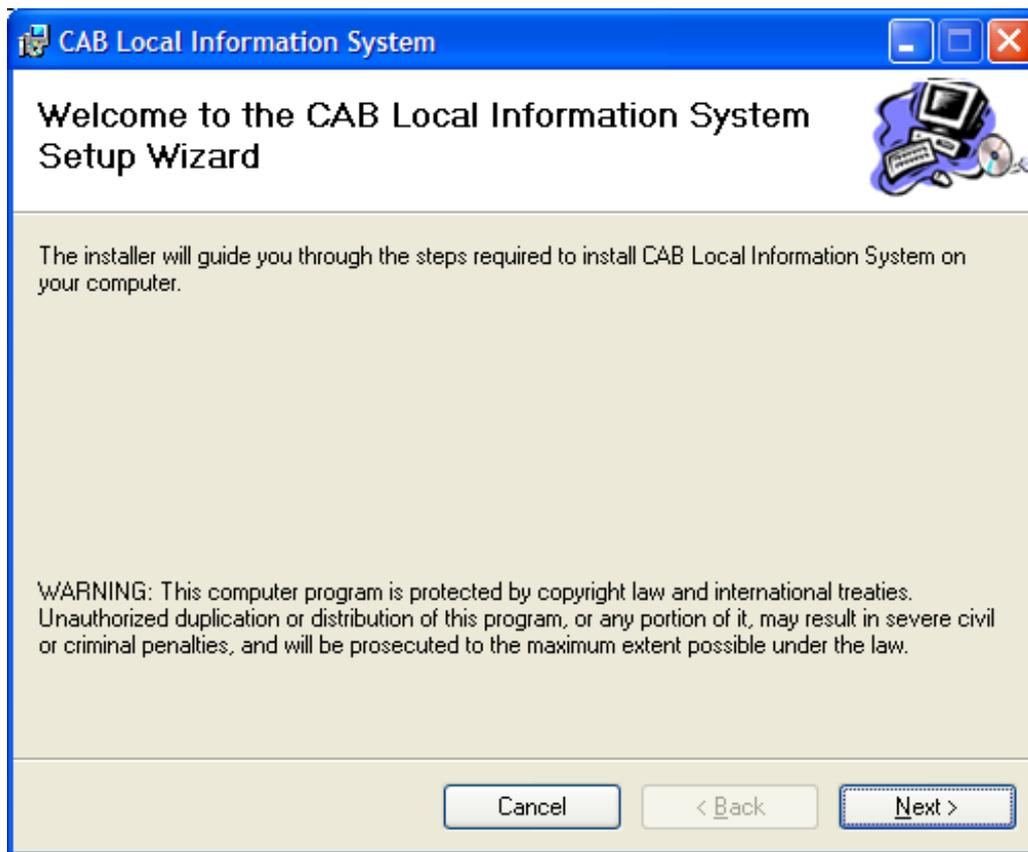
Click OK to start the installation process.

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<sup>4</sup> If it helps, you can copy the unzipped installation media to a memory stick and run the install program from there.

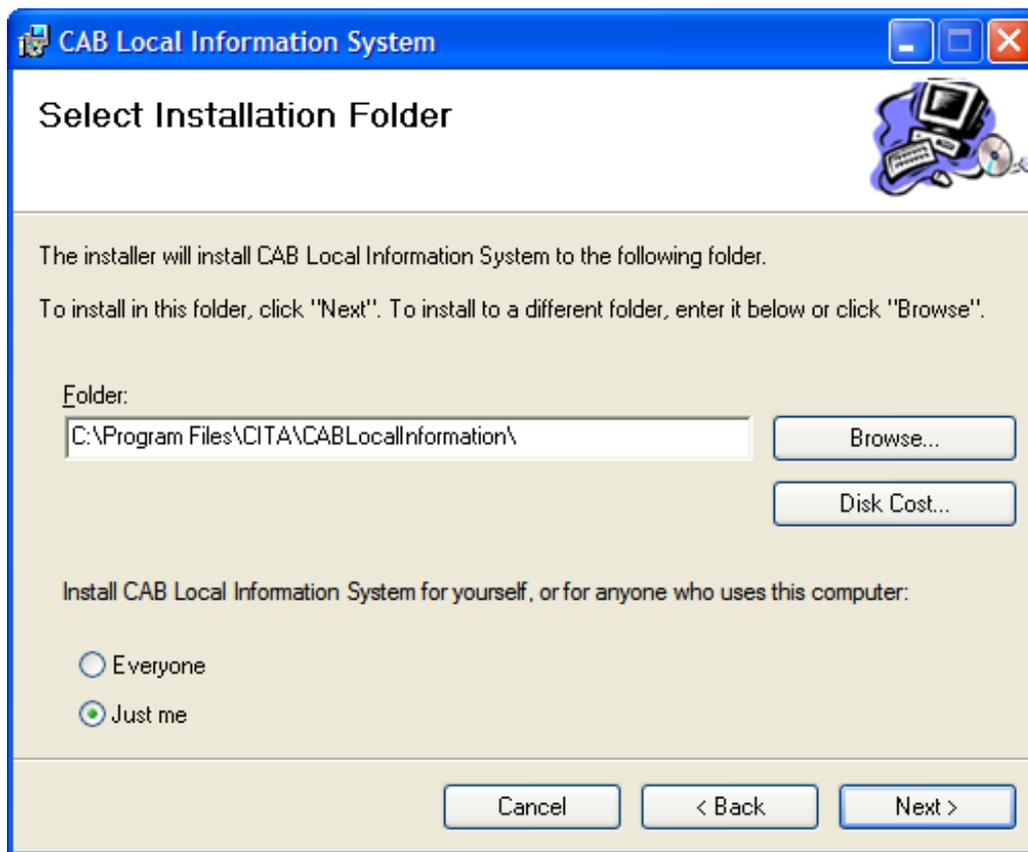
<sup>5</sup> You can skip installation of .NET and Microsoft Access Database Engine if you know they are already installed – you can run both installers from a memory stick.

You will see this screen:



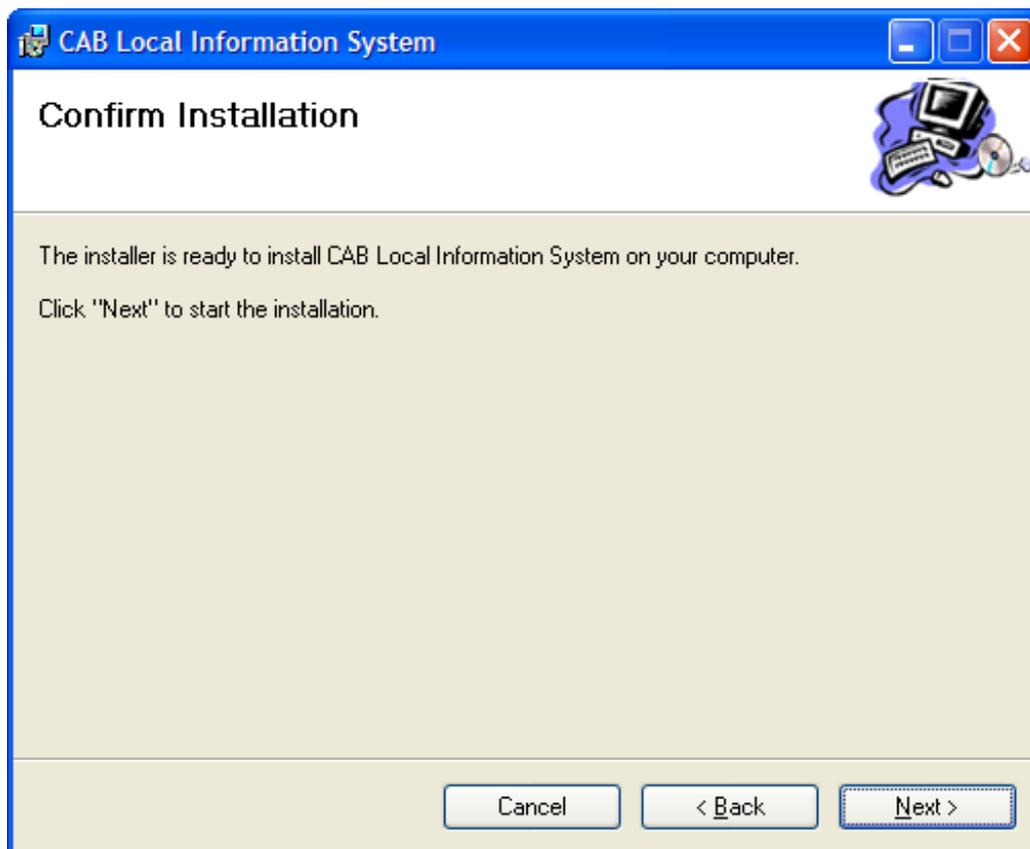
Click 'Next'.

You will see this screen:



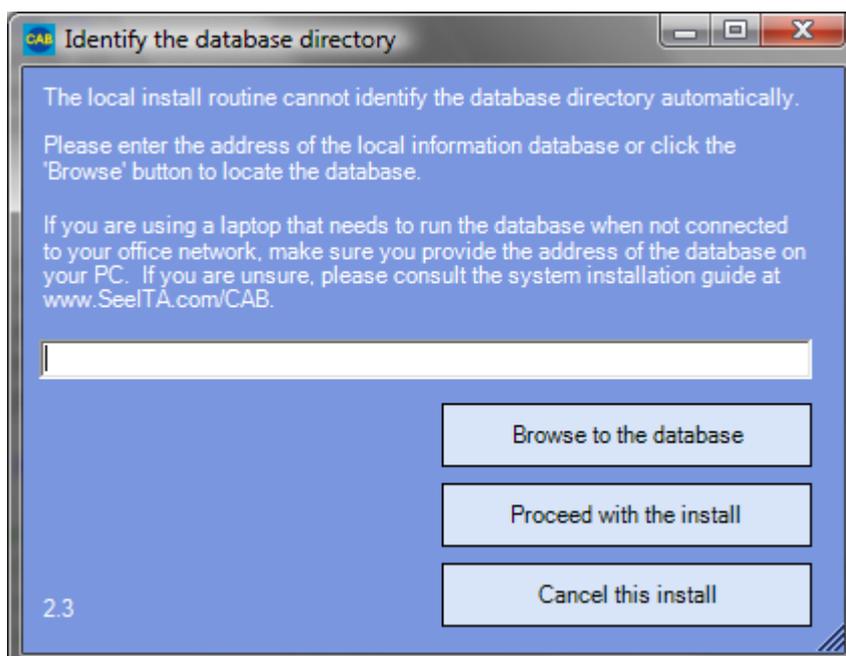
Click 'Everyone' and 'Next' to install the update.

You will see this screen:



Click 'Next'.

You will see this screen:

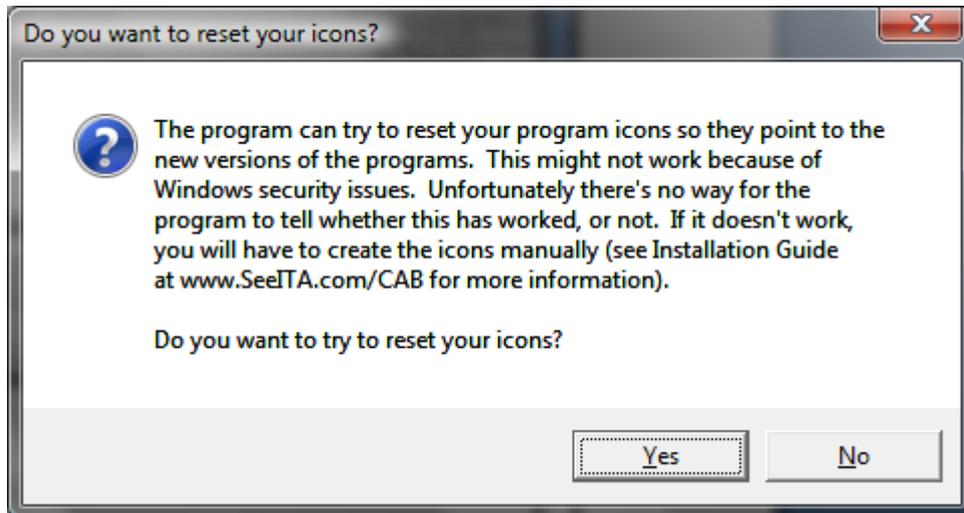


Enter the local information database folder you wrote down earlier. Then type a “\” character if the directory doesn’t already end with one. Finally type the database name (normally

LocalInformation.mdb). If you prefer, click 'Browse to the database' to find the database on your network.

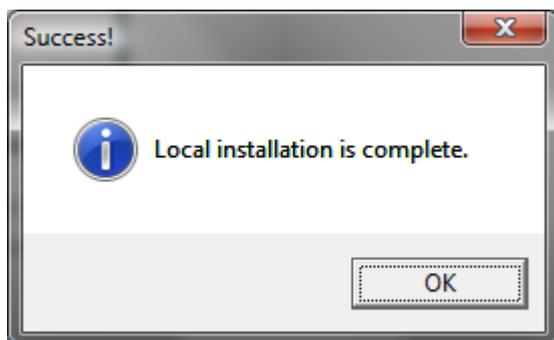
Click 'Proceed with the install'.

You will see the screen update as it copies files down from the server. You will then see this message:



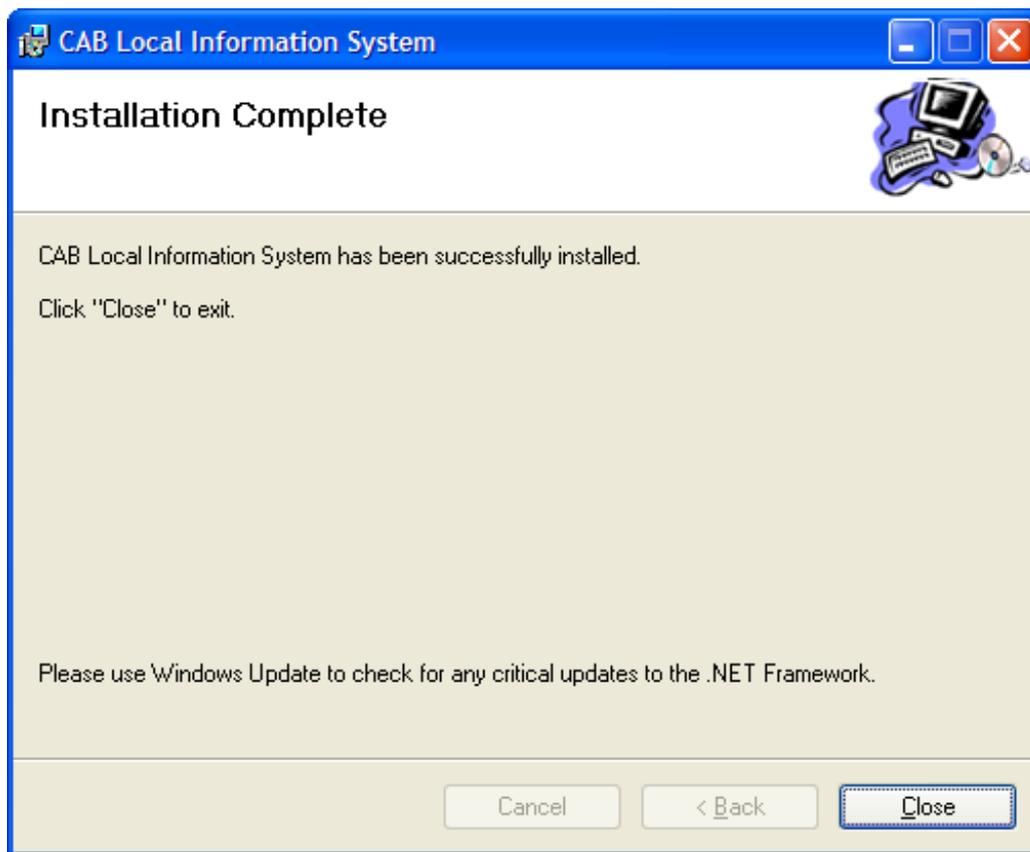
In general, it is safest to click 'Yes' to reset your program icons. However, if you find you are encountering security problems you can skip this step by clicking 'No' - in this case, use worksheet L - Install program icons manually' to add the icons you need. If you are installing to Windows 8, we suggest you reply 'No' and use the manual method.

You will then see this message:



Click 'OK'.

You will see this screen:



Click 'Close' to complete the installation process.

You have completed this worksheet.

To search the local information database, double-click the 'Local Information Database' icon on the PC's desktop or in the PC's programs menu. To maintain the local information database, click the 'Local Information Maintenance' icon in the PC's programs menu.

## Worksheet D - Upgrade from version 1 to a later version on the central PC

This worksheet assumes that you have already installed version 1 of the local information system and that you want to upgrade to the latest version.

The upgrade proceeds in two steps:

1. You install the latest version on the central PC. From this point on, the PCs in your network will repetitively try to update to the latest version every time they are used to run the local information system. That's OK, but the next step gets rid of the unnecessary updates.
2. You install the new update mechanism on each PC (see worksheets: 'Upgrade from version 1 to a later version on the PCs' and 'Install to a laptop'). This allows the PCs to update themselves successfully.

You need to know where your local information database is stored. If you are unsure where it is, go to a PC that is running version 1 of the system and double click file LocalInformation.xml in folder C:\ProgramFiles\CITA\CABLocalInformation. You will see a page like this open in your web browser:

```
- <xml>
  <formWidth>869</formWidth>
  <formHeight>601</formHeight>
  <formTop>5</formTop>
  <formLeft>28</formLeft>
  <formSplitterLeft>152</formSplitterLeft>
  <StopNewWindow />
  <databaseName>LocalInformation.mdb</databaseName>
  <databaseDirectory>\\Andyhenderson3\C\LocalInformationDatabase</databaseDirectory>
  <logDirectory>\\Andyhenderson3\C\LocalInformationDatabase\systemLogs</logDirectory>
  <searchPrefix>http://www.google.co.uk/search?hl=en&q=</searchPrefix>
  <BureauName>Epsom & Ewell</BureauName>
</xml>
```

The directory name you need is the black text between <databaseDirectory> and </databaseDirectory>. The name of the database is the black text between <databaseName> and </databaseName>

Write the local information database directory and file name down. You'll need them for this and the remaining worksheets in this task.

Before you start, make sure you have a recent backup copy of the database. You shouldn't need this backup - but it's as well to be cautious.

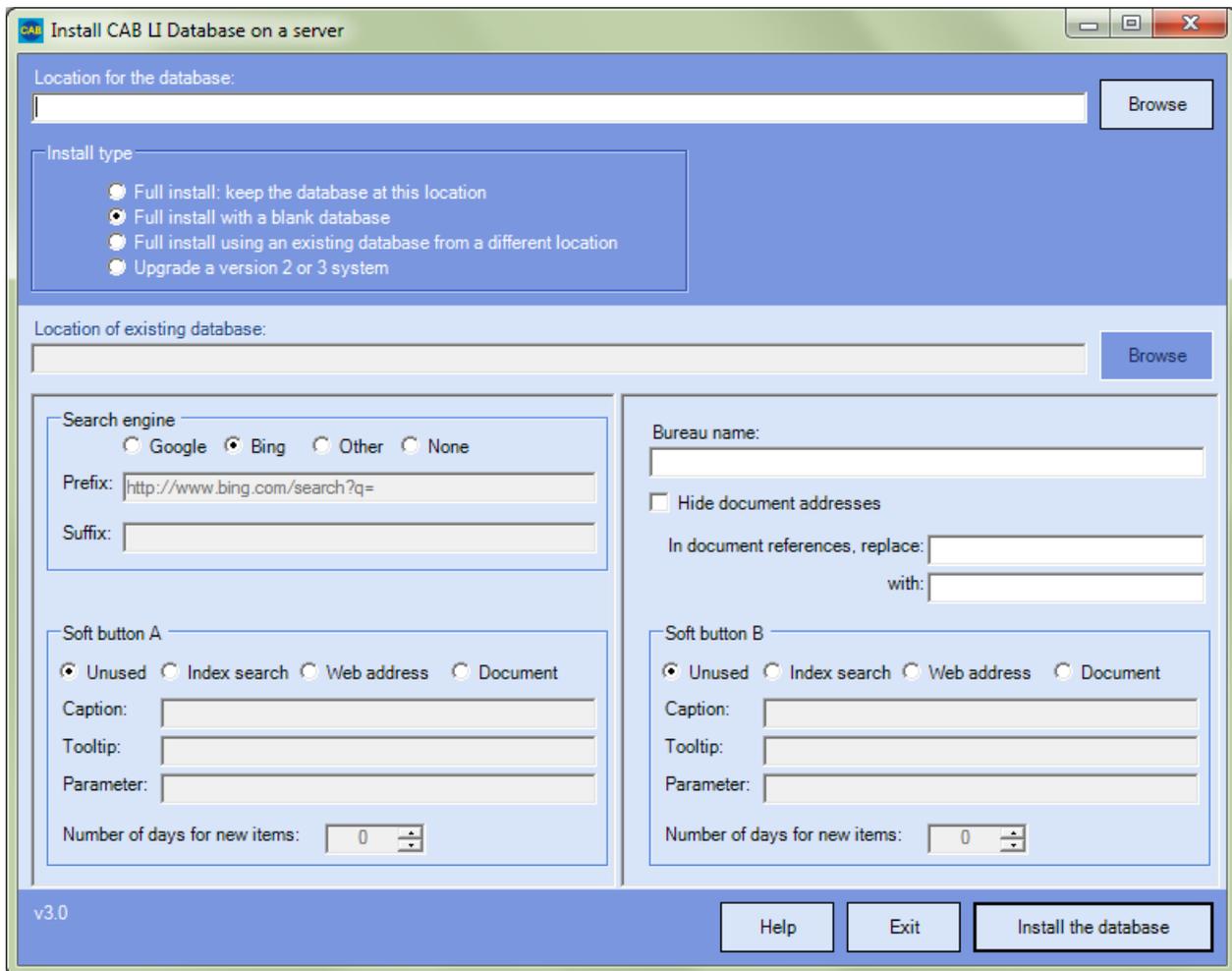
Decide which PC you will run the install from. To avoid confusion over addresses **do not use the central PC that will hold the database to run the installation program**. Instead, you can use any of the other PCs that will run the local information programs. That way you can be sure the address you use for the central PC can be accessed from other PCs in the network.

Copy the installation media to your chosen PC<sup>6</sup>.

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<sup>6</sup> If it helps, you can copy the installation media a memory stick and run the install program from there.

Double-click CABNetworkInstall.exe. It's in the top-level directory of the directory. You will see this screen:



Click 'Full install: keep the database at this location' to change the install type. This will ensure you do not overwrite your existing database.

Enter the full location of the database in the first box on the screen. Enter the database folder you wrote down earlier. Then type a "\" character if the directory doesn't already end with one. Finally type the database name you wrote down earlier.

Decide which search engine you want to use. If you want to use something other than Bing or Google you will need to specify a prefix and, possibly a suffix. If you are not sure what to use, we suggest you click 'Bing' as it seems to us that it finds UK-specific information more easily than Google. To find out more about alternate search engines, click the 'Help' button.

Enter your bureau's name in the 'Bureau name box'. This will appear in the text shown when people start the local information database and in the heading of that screen. For example, we use "Epsom and Ewell". By default, the system appends "Citizens Advice Bureau" to the bureau name. You can suppress that by adding a trailing "-" to the bureau name.

Check the 'Hide document addresses' box if you prefer not to show the full document address next to document links in the reader program. If in doubt, leave this box unchecked (you can change your mind later).

Leave the document references replacement boxes blank for now.

Decide whether you want to show 0, 1 or 2 soft buttons in the left hand pane of the reader program. Select the radio button corresponding to the action you want each button to take:

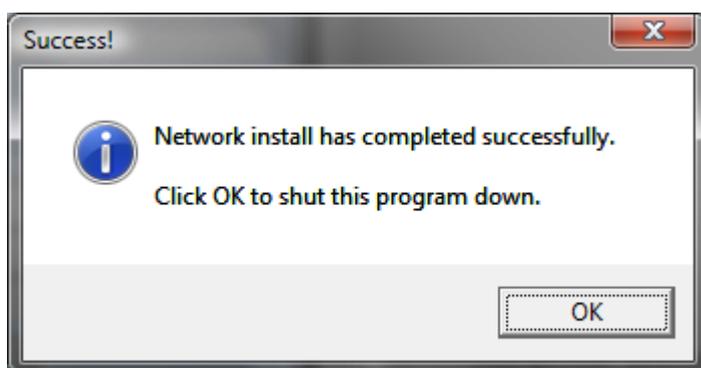
- **Unused.** The button will not appear in the reader program. You don't need to enter anything else for this button.
- **Index search.** The button will run a search on the database as if the user had entered one or more search terms and pressed the 'Search' button. For example, in Epsom & Ewell we create a 'Local news' button to list all entries containing the search term "adviser". This displays all entries relating to the bureau itself giving us a simple Intranet. Put the search term you want to use in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it. You will also need to define how many days back the program should look for new items when deciding whether to flash the button in red with the text "Recent update"; specify zero if you do not want people to be alerted to updates.
- **Web address.** The button will display a web page. That could be an often-used web page, or it could be a link to a page that displays a list of useful links. Put the address of the web page you want to show in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it.
- **Document.** The button will display a document from your network. For example, it might be a policy document or an attendance rota.

It is likely you will know of several web pages and documents that people will want to access frequently. You can put all these links into a single web page held in your network and point a soft button to it. To find out more, see worksheet M – Create a 'frequently used links' soft button.

If you are unsure how to use the soft buttons, set both to 'Unused'. You can activate them later if you want.

Now click 'Install the database'.

After a short while, you should see this message:



Click 'OK'.

You have completed this worksheet.

## Worksheet E - Upgrade from version 1 to a later version on the PCs

Execute the following procedure on each PC currently running version 1 of the local information system.

Do not use this procedure for laptops that need to use the local information system while outside the office. Instead use Worksheet G - Install to a laptop.

If you use Windows NT, XP, Vista, Windows 7, Windows 8 or Windows 10, you will need to log in to the PC as an Administrator. If you are unsure what that means, try the install anyway. If you see security error messages, you should make sure you have administrator status before trying again.

From the PC, use Windows Explorer or My Computer to navigate to the local information database folder you wrote down when using the 'Updating version 1 on the server' worksheet.

Open the systemInstall subfolder.

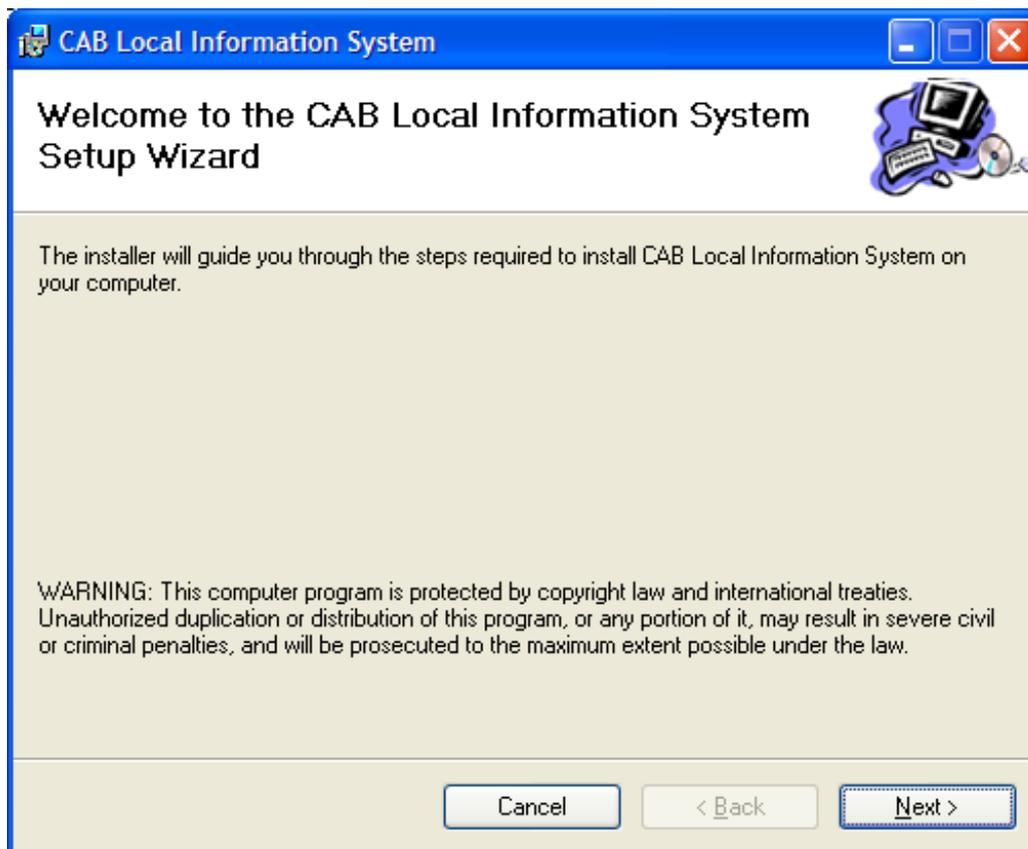
Double-click CABSetup.msi.

You might see a screen like this:



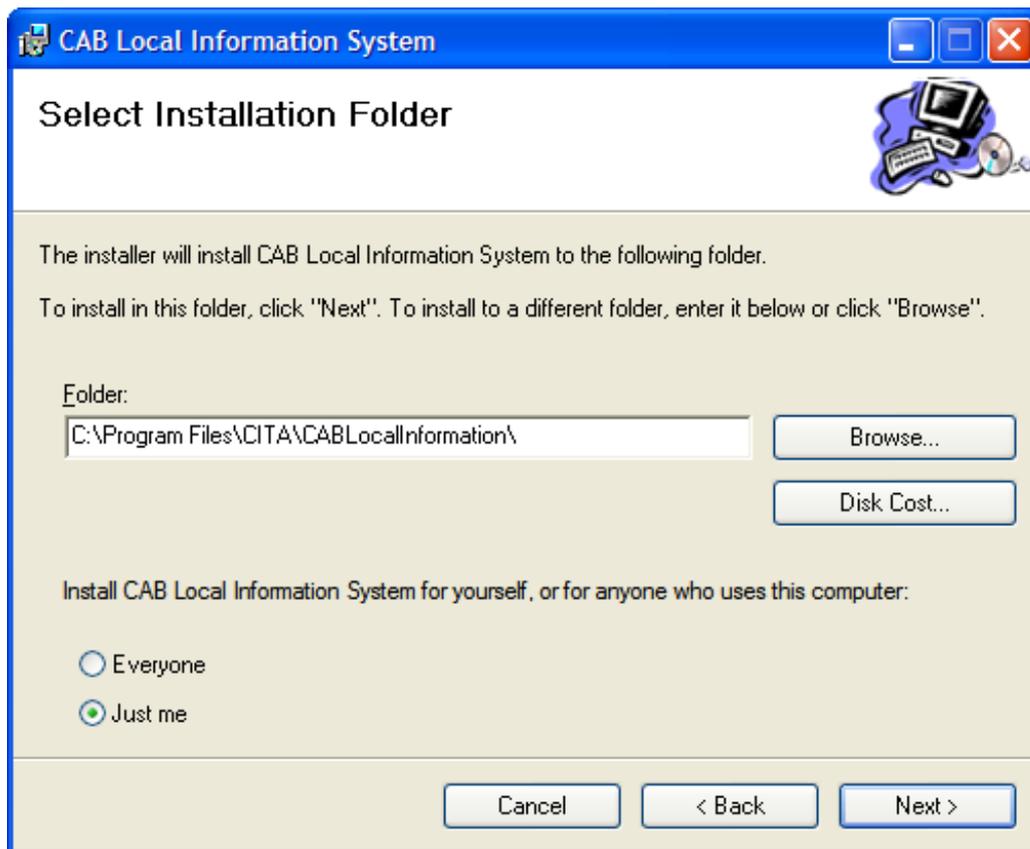
Click 'Run' to start the install.

You will see this screen:



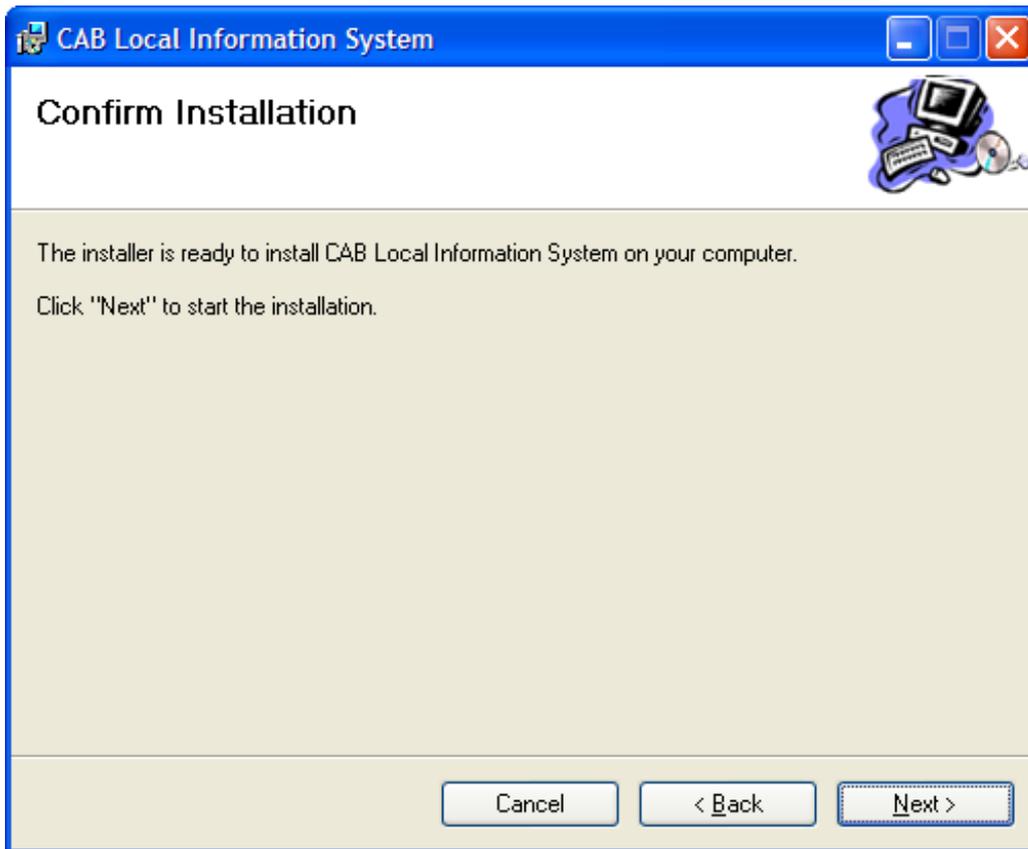
Click 'Next'.

You will see this screen:



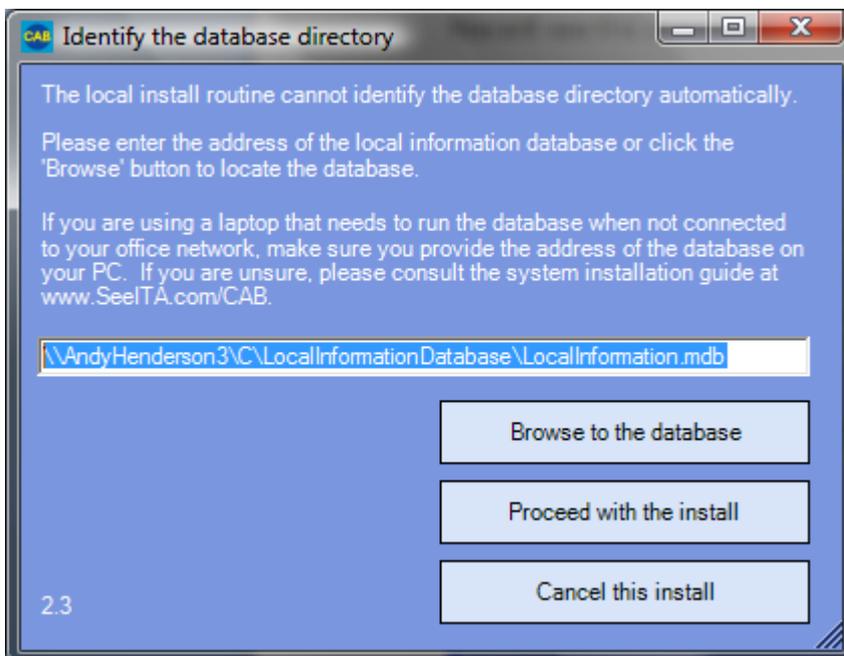
Click 'Everyone' and 'Next' to install the update.

You will see this screen:



Click 'Next'.

You will see this screen:

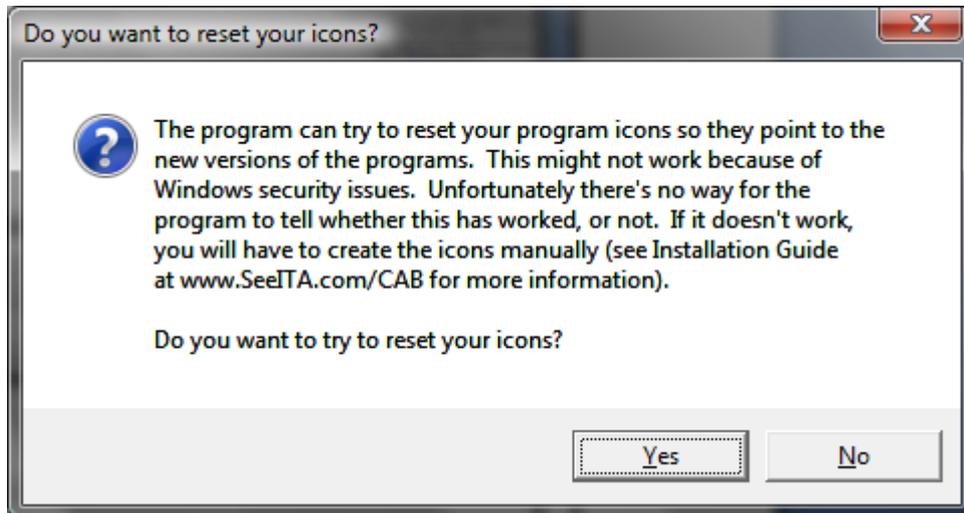


If the program cannot determine the address of the local information database (or if the address is wrong) enter the address you used down with the 'Upgrade from version 1 to version 2 on the

central PC' worksheet. If you prefer, click 'Browse to the database' to find the database on your network.

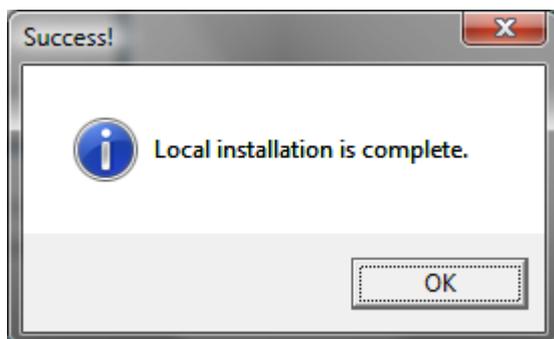
Click 'Proceed with the install'.

You will see the screen update as it copies files down from the server. You will then see this message:



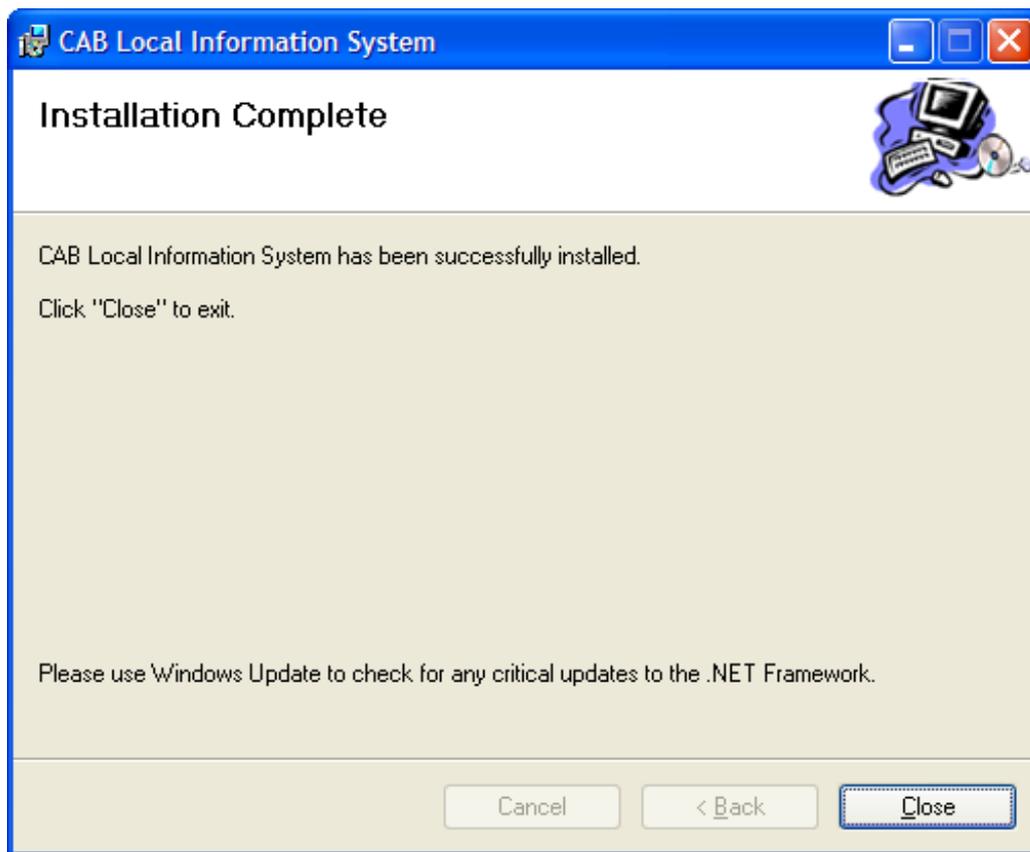
It is safest to click 'Yes' to reset your program icons. However, if you find you are encountering security problems you can skip this step by clicking 'No' - in this case, use worksheet L - Install program icons manually' to add the icons you need.

You will then see this message:



Click 'OK'.

You will see this screen:



Click 'Close' to complete the installation process.

You can check the system has been installed successfully by running the 'Local Information Database' icon on the desktop.

Finally, delete any spurious local information system icons that might be on the desktop. The one you want to keep is called 'Local Information Database' and displays the message "Local Information Database Helps you search our local information database for information that might be useful to clients" when you hover your mouse over it.

You have completed this worksheet.

## Worksheet F - Install to a stand-alone PC

This worksheet helps you set up the local information on a stand-alone PC. You might want to do this to:

1. Set up the database for use on just one PC
2. Evaluate the system before deploying it in your office.

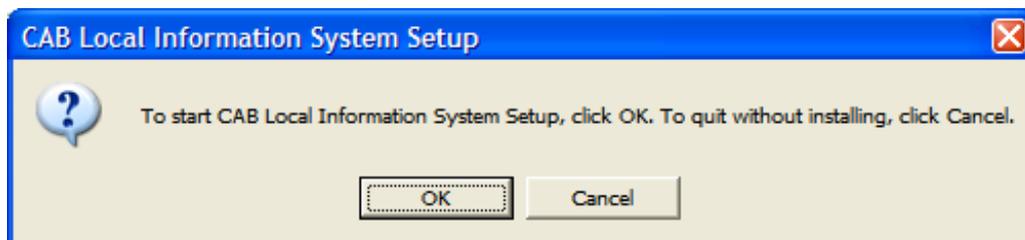
There are a number of screens involved, but that's because the Microsoft installation routines are somewhat verbose. In practice, the process is a straightforward one.

If you use Windows NT, XP, Vista, Windows 7, Windows 8 or Windows 10, you will need to log in to the PC as an Administrator. If you are unsure what that means, try the install anyway. If you see security error messages, you should make sure you have administrator status before trying again.

Copy the Installation media into your chosen PC<sup>7</sup>.

Install .NET 1.1 - see page 65 for more detail. Install the Microsoft Access Database Engine - see page 68 for more detail<sup>8</sup>.

If you are running Windows 10, Windows 8, Windows 7 or Vista, right click Setup.exe and click 'Run as Administrator' and confirm your authorisation to the User Account Control (UAC) screen. Otherwise, double-click Setup.exe.



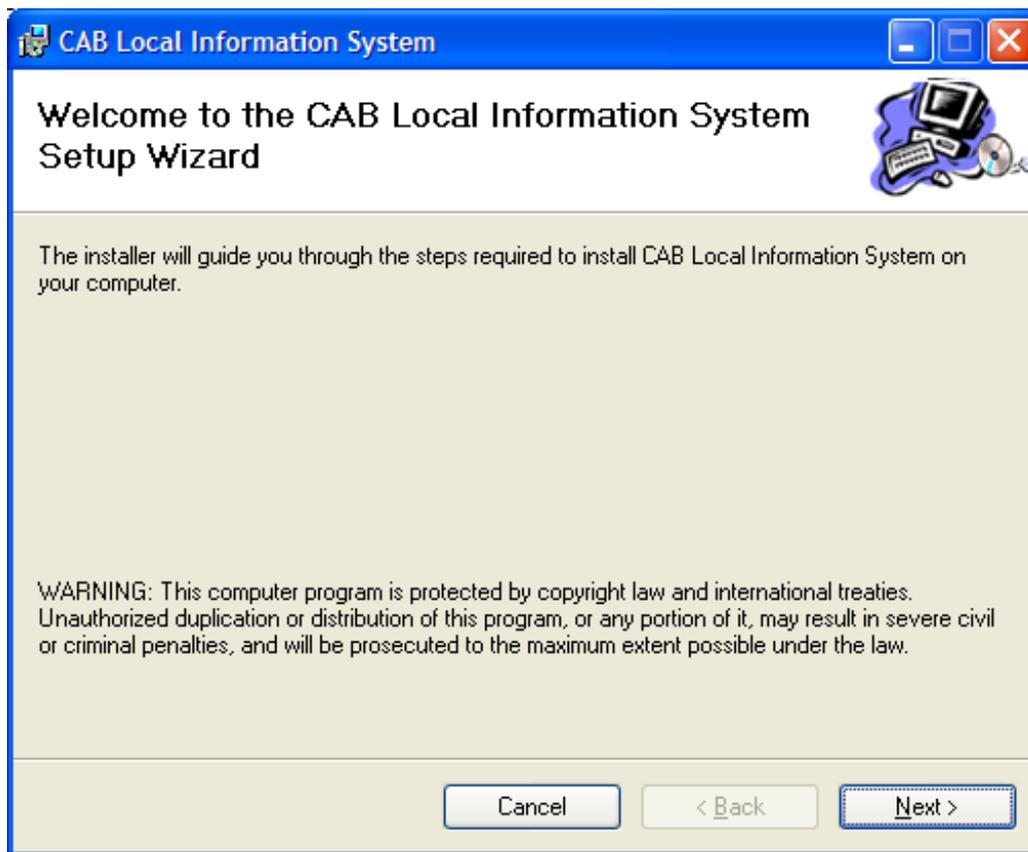
Click OK to start the installation process.

---

<sup>7</sup> If it helps, you can copy the unzipped installation media to a memory stick and run the install program from there.

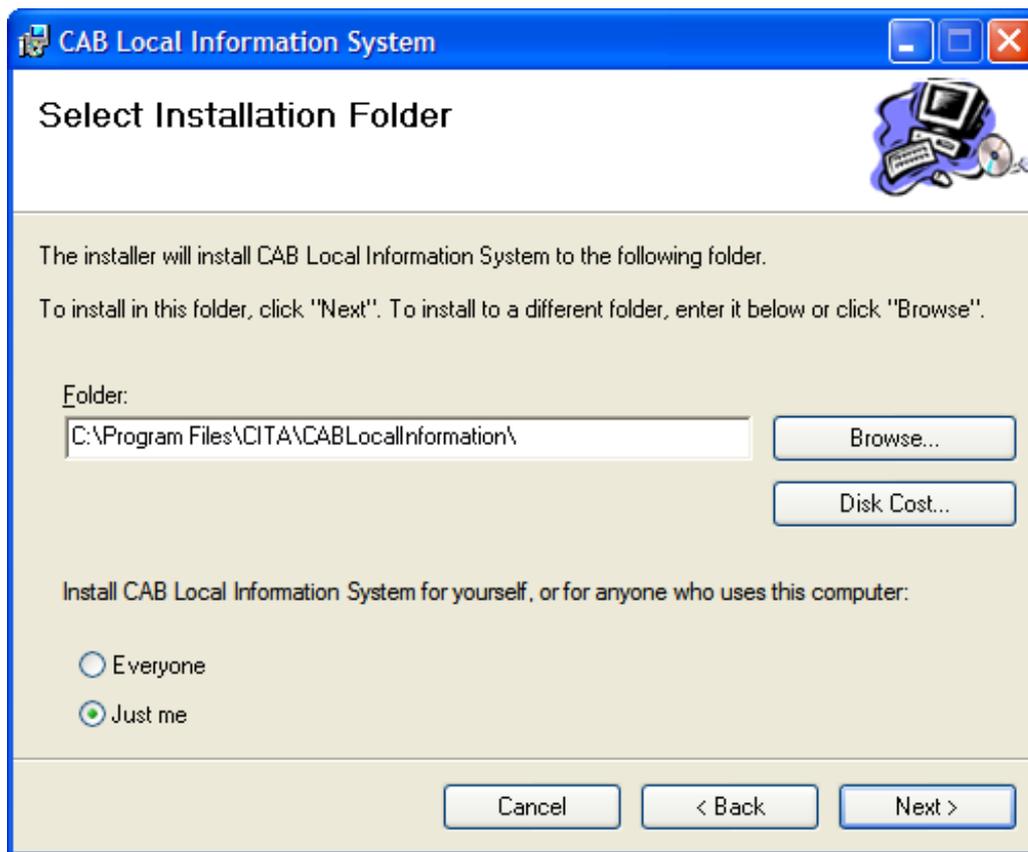
<sup>8</sup> You can skip installation of .NET and Microsoft Access Database Engine if you know they are already installed – you can run both installers from a memory stick.

You will see this screen:



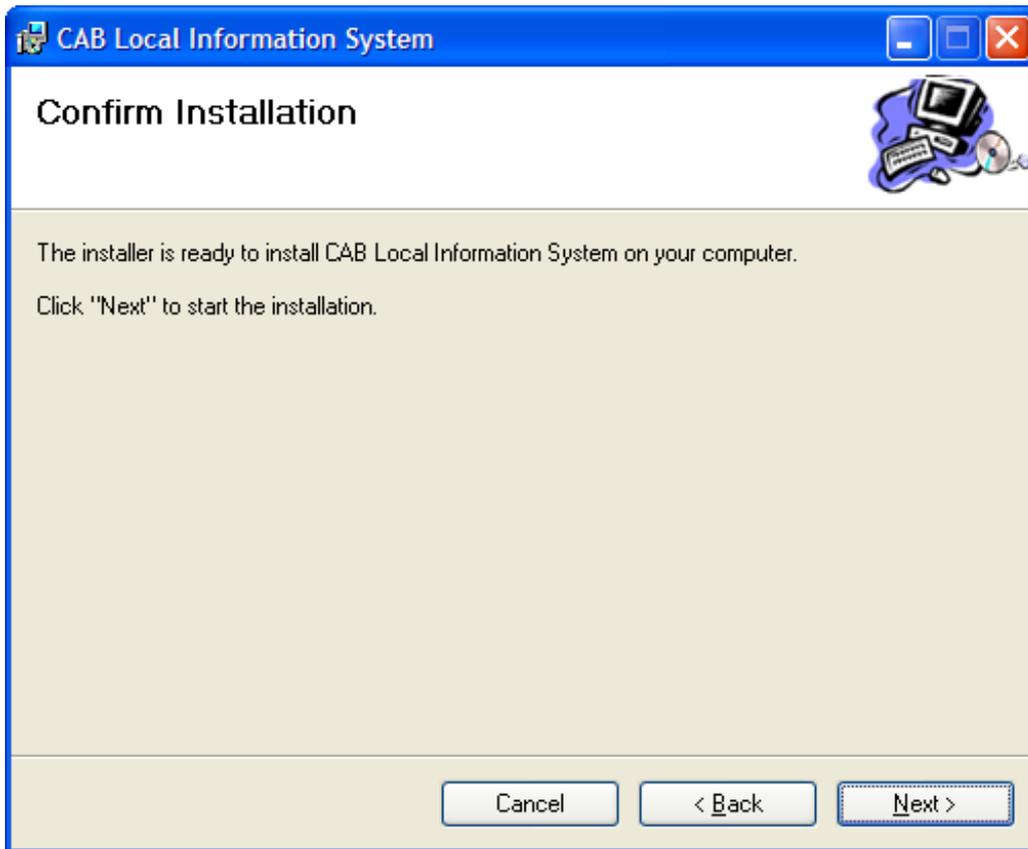
Click 'Next'.

You will see this screen:



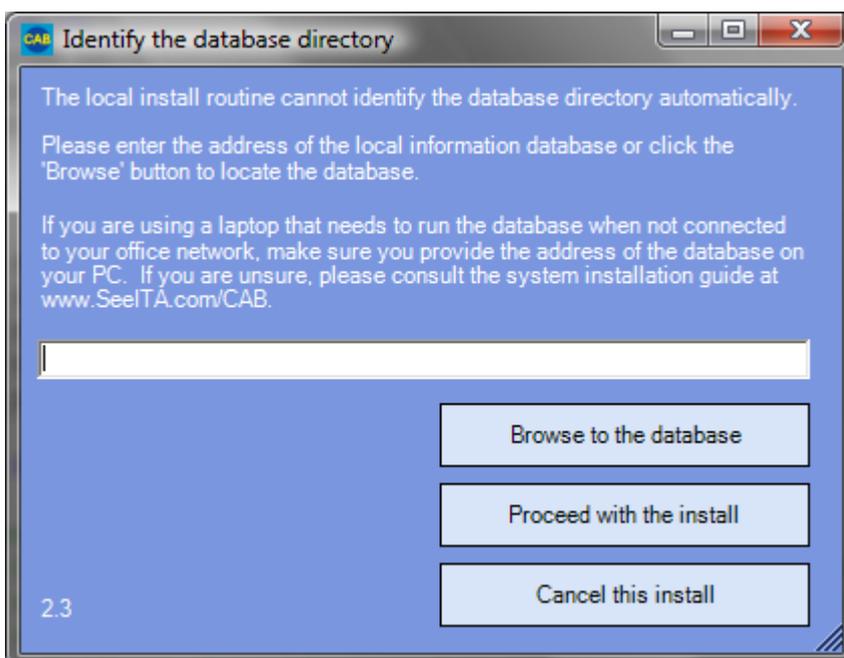
Click 'Everyone' and 'Next' to install the update.

You will see this screen:



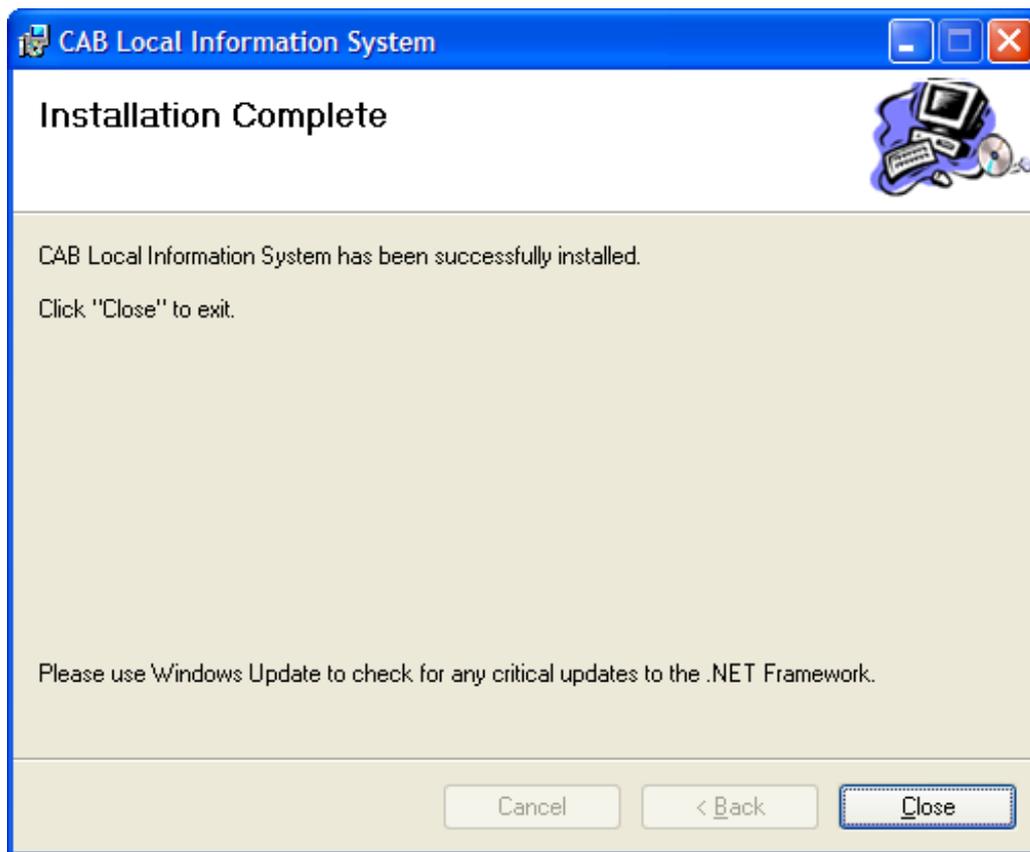
Click 'Next'.

You will see this screen:



Click 'Cancel this install'. We'll be coming back to this screen later.

You will see this screen:

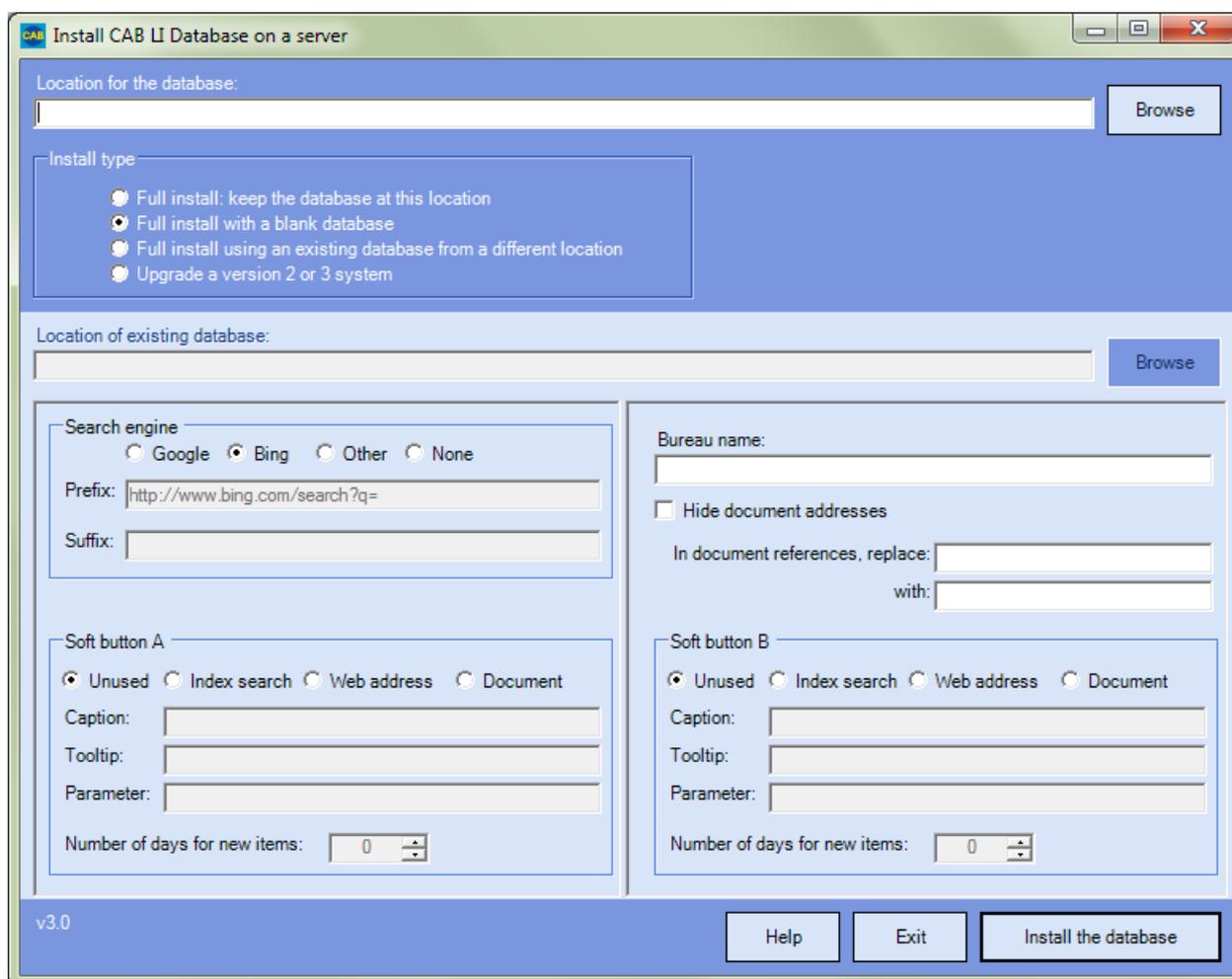


Click 'Close' to complete the installation process.

### **Install the database**

To install the database, go back to the Install media and return to the top-level directory.

Double-click CABNetworkInstall.exe. You will see this screen:



Click 'Browse' to the right of the first box and you will see the standard Windows 'Save as' screen. Save the database (it will be called LocalInformation.mdb by default) to any convenient place on your disk. You can use the 'Create new folder' icon to create a new directory for your database if you want.

You will probably see a message warning you about using a local disk. You can safely ignore the message.

Decide which search engine you want to use. If you want to use something other than Bing or Google you will need to specify a prefix and, possibly a suffix. If you are not sure what to use, we suggest you click 'Bing' as it seems to us that it finds UK-specific information more easily than Google. To find out more about alternate search engines, click the 'Help' button.

Enter your bureau's name in the 'Bureau name box'. This will appear in the text shown when people start the local information database and in the heading of that screen. For example, we use "Epsom and Ewell". By default, the system appends "Citizens Advice Bureau" to the bureau name. You can suppress that by adding a trailing "-" to the bureau name.

Check the 'Hide document addresses' box if you prefer not to show the full document address next to document links in the reader program. If in doubt, leave this box unchecked (you can change your mind later).

Leave the document references replacement boxes blank for now.

Decide whether you want to show 0, 1 or 2 soft buttons in the left hand pane of the reader program. Select the radio button corresponding to the action you want each button to take:

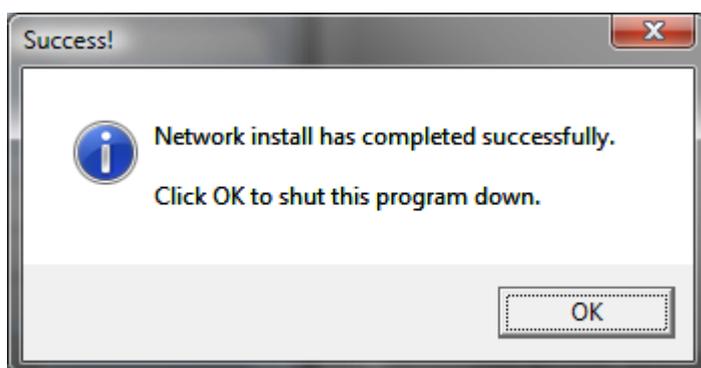
- **Unused.** The button will not appear in the reader program. You don't need to enter anything else for this button.
- **Index search.** The button will run a search on the database as if the user had entered one or more search terms and pressed the 'Search' button. For example, in Epsom & Ewell we create a 'Local news' button to list all entries containing the search term "adviser". This displays all entries relating to the bureau itself giving us a simple Intranet. Put the search term you want to use in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it. You will also need to define how many days back the program should look for new items when deciding whether to flash the button in red with the text "Recent update"; specify zero if you do not want people to be alerted to updates.
- **Web address.** The button will display a web page. That could be an often-used web page, or it could be a link to a page that displays a list of useful links. Put the address of the web page you want to show in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it.
- **Document.** The button will display a document from your network. For example, it might be a policy document or an attendance rota.

It is likely you will know of several web pages and documents that people will want to access frequently. You can put all these links into a single web page held in your network and point a soft button to it. To find out more, see worksheet M – Create a 'frequently used links' soft button.

If you are unsure how to use the soft buttons, set both to 'Unused'. You can activate them later if you want.

Now click 'Install the database'.

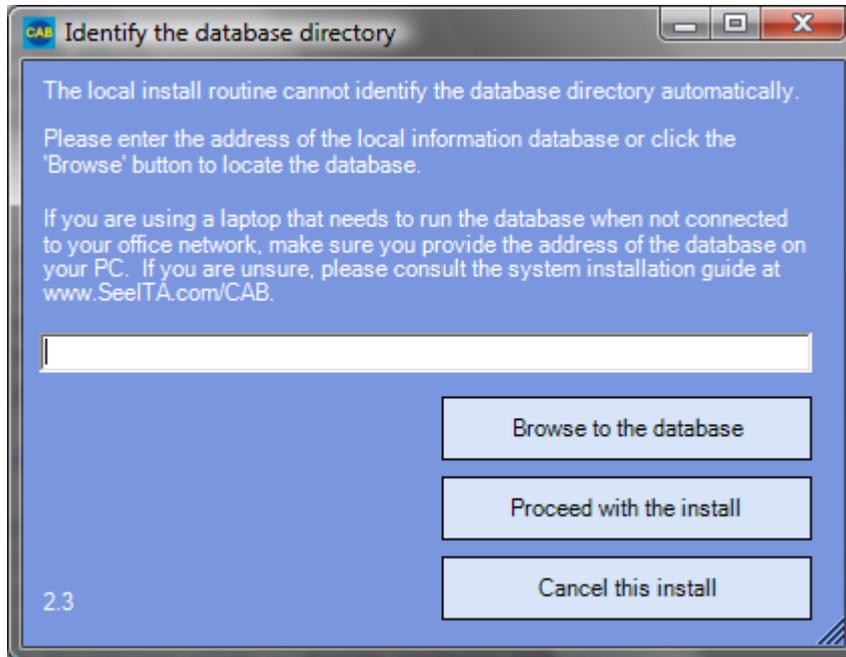
After a short while, you should see this message:



Click 'OK'.

## Finish up

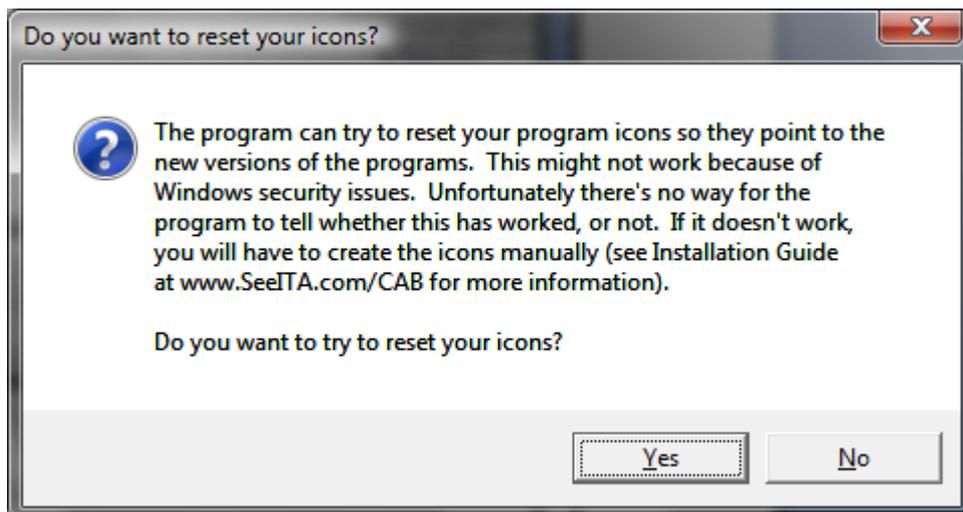
Click the 'Local Information Database' icon on your desktop. You will see this screen:



Click 'Browse to the database' and select the database you just created.

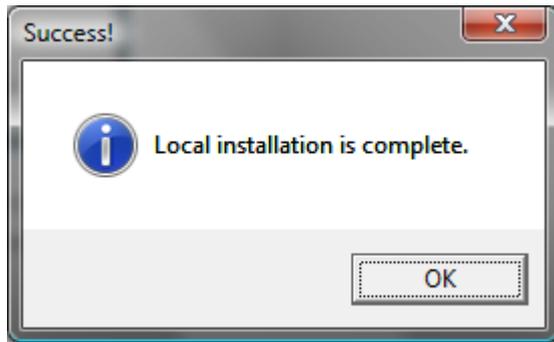
Click 'Proceed with the install'.

You will see the screen update as it copies files. You will then see this message:



In general, it is safest to click 'Yes' to reset your program icons. However, if you find you are encountering security problems you can skip this step by clicking 'No' - in this case, use worksheet L - Install program icons manually' to add the icons you need. If you are installing to Windows 8, we suggest you reply 'No' and use the manual method.

You will then see this message:



Click 'OK'.

The local information database program will start automatically.

You have completed this worksheet.

To search the local information database, double-click the 'Local Information Database' icon on the PC's desktop or in the PC's programs menu. To maintain the local information database, click the 'Local Information Maintenance' icon in the PC's programs menu.

## Worksheet G - Install to a laptop

Note that we provide a version of the local information system that you can use via a web browser. We provide features that allow you to store the database at an internet service provider. You would then be able to use the local information system from anywhere provided you have internet access. To learn more about the 'Intranet' version, see the Installation Guide in the 'Intranet' folder of the installation media.

In order to be able to run the local information system on a laptop while out of the office, the laptop must hold a copy of the database. You will therefore need a way to copy the database folder - and its subfolders - on the central PC to each laptop. For example:

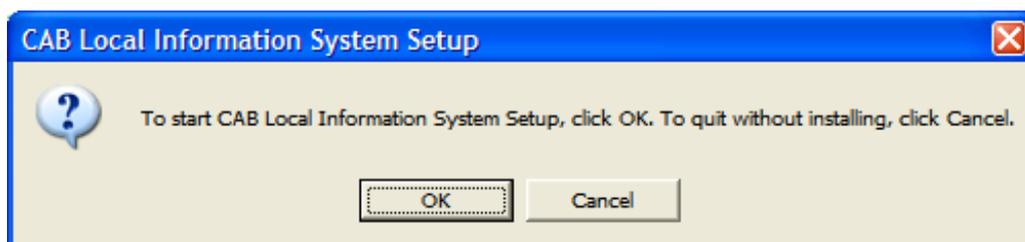
1. You could connect the laptop to the network and use the network to copy the files; or
2. You could copy the files using a memory stick.

The first step in setting up a laptop is to perform the file copy. Make sure you copy all the files and folders from the database folder on the Server PC to the laptop. You can use any directory you like on the laptop.

If you use Windows NT, XP, Vista, Windows 7, Windows 8 or Windows 10, you will need to log in to the PC as an Administrator. If you are unsure what that means, try the install anyway. If you see security error messages, you should make sure you have administrator status before trying again.

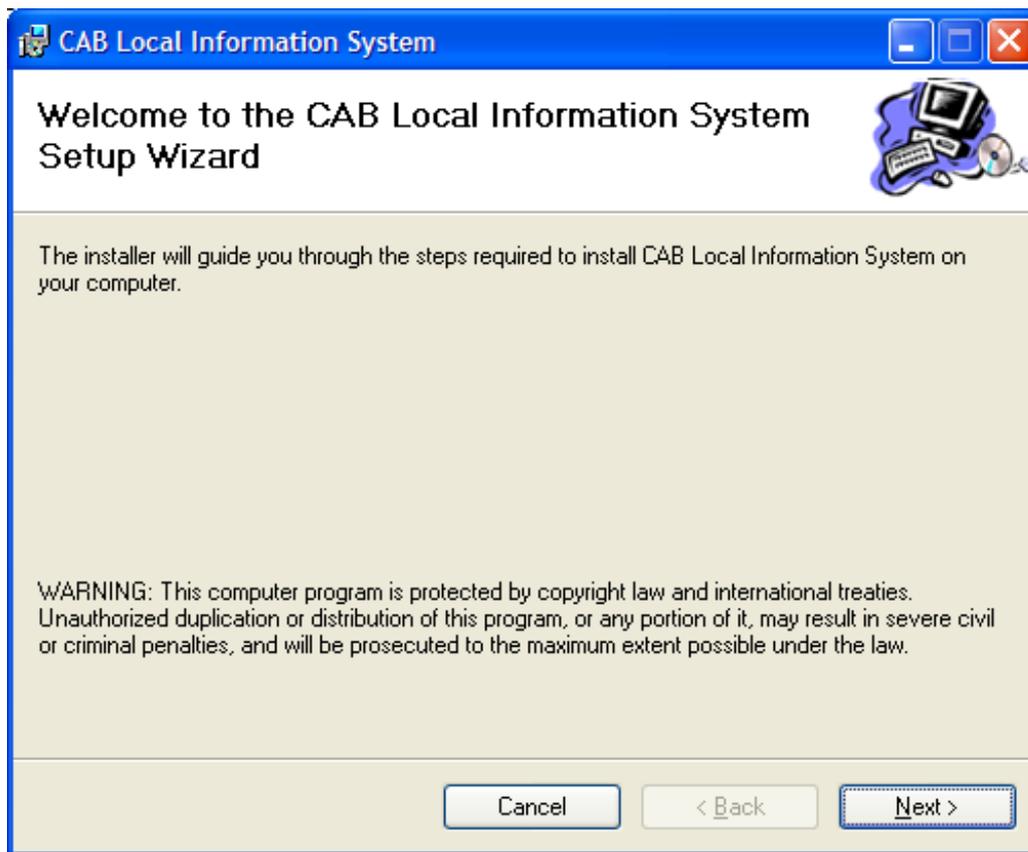
From the PC, use Windows Explorer or My Computer to navigate to the directory on the laptop that contains the copy local information database. Open the systemInstall subdirectory.

If you are running Windows 10, Windows 8, Windows 7 or Vista, right click Setup.exe and click 'Run as Administrator' and confirm your authorisation to the User Account Control (UAC) screen. Otherwise, double-click Setup.exe.



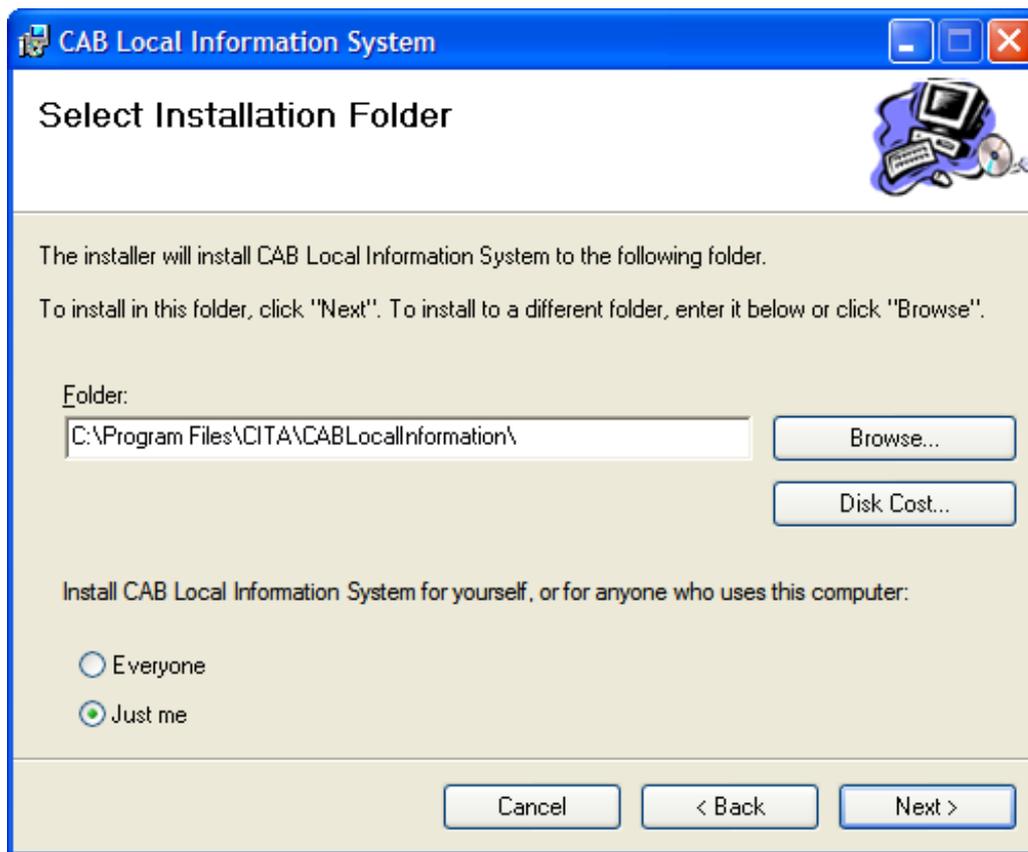
Click OK to start the installation process.

You will see this screen:



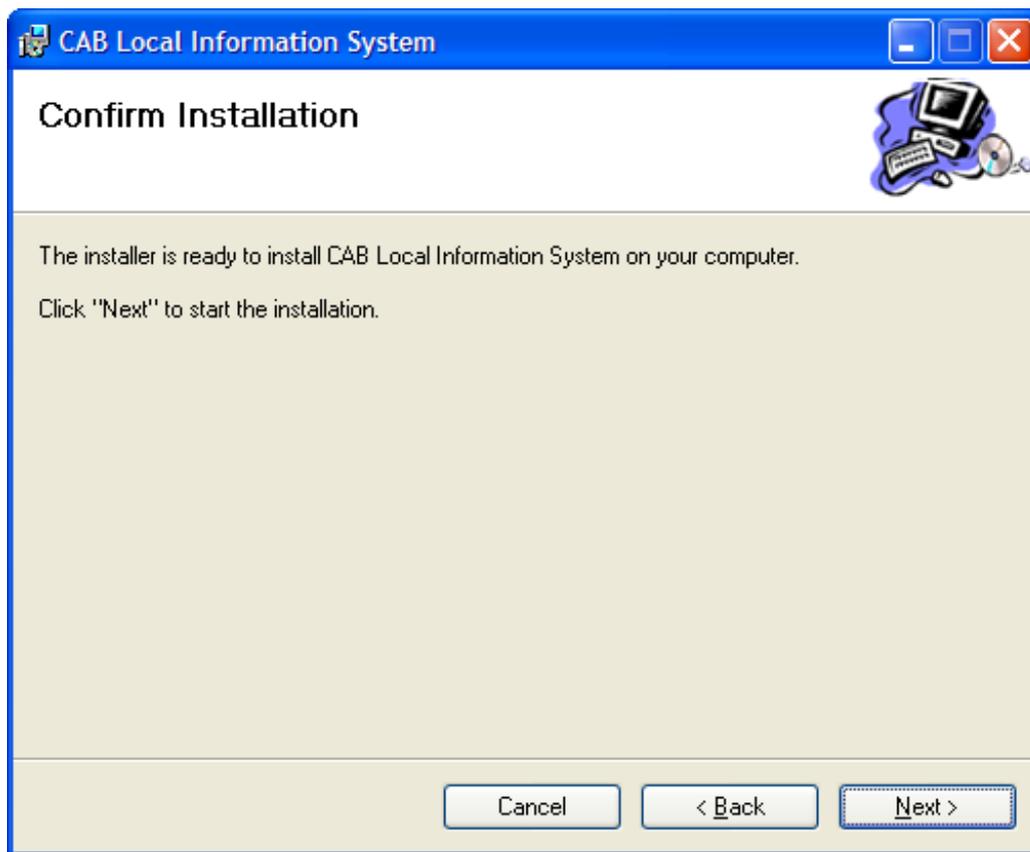
Click 'Next'.

You will see this screen:



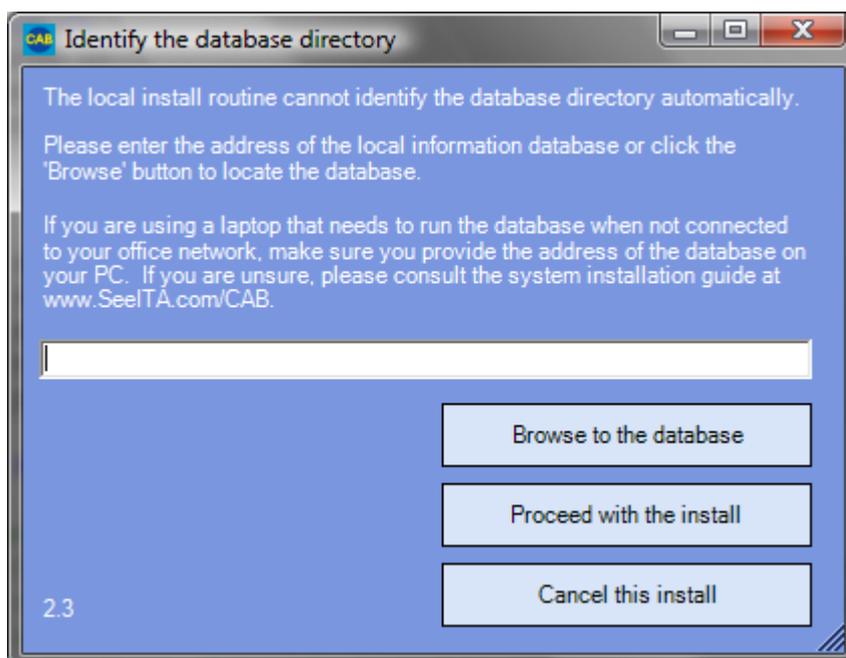
Click 'Everyone' and 'Next' to install the update.

You will see this screen:



Click 'Next'.

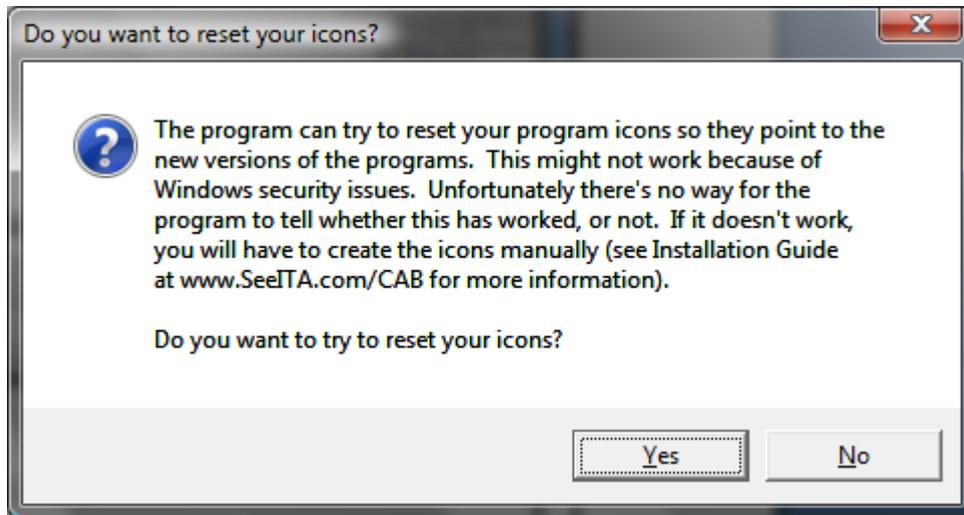
You will see this screen:



Click 'Browse to the database' and select the laptop's copy of the database you copied from the Server PC.

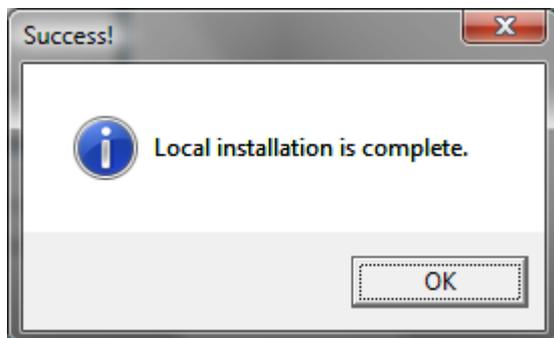
Click 'Proceed with the install'.

You will see the screen update as it copies files. You will then see this message:



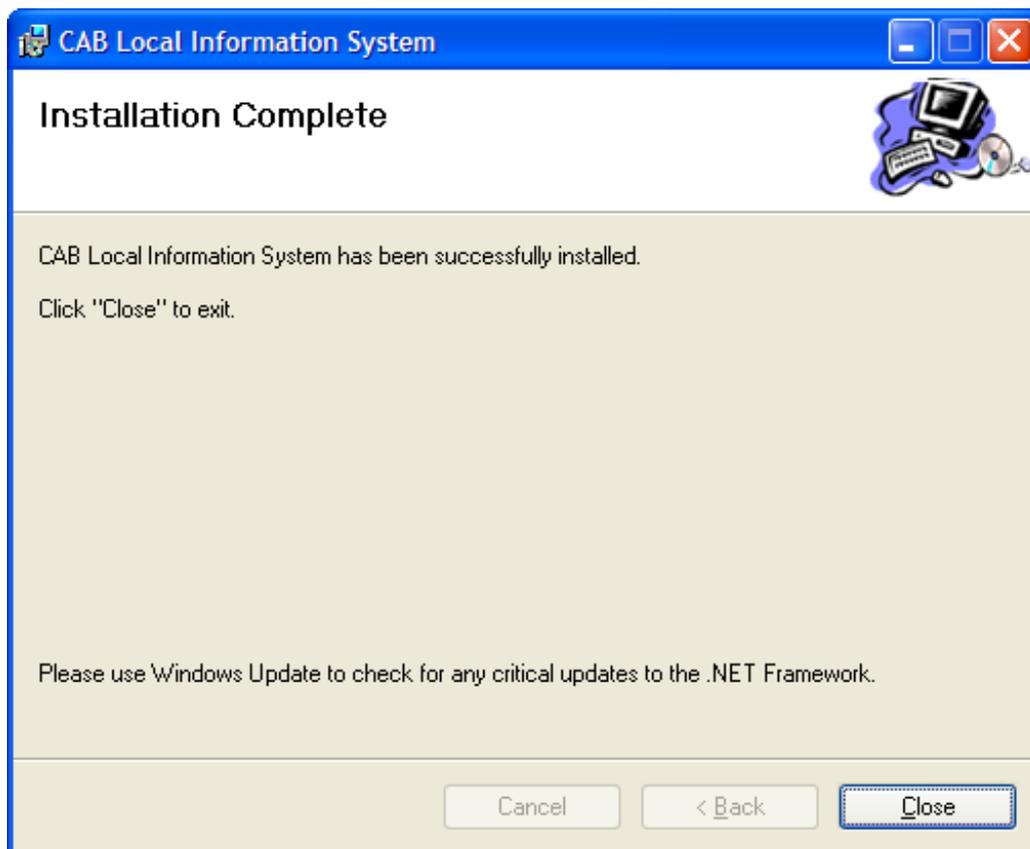
In general, it is safest to click 'Yes' to reset your program icons. However, if you find you are encountering security problems you can skip this step by clicking 'No' - in this case, use worksheet L - Install program icons manually' to add the icons you need. If you are installing to Windows 8, we suggest you reply 'No' and use the manual method.

You will then see this message:



Click 'OK'.

You will see this screen:



Click 'Close' to complete the installation process.

You have completed this worksheet.

To search the local information database, double-click the 'Local Information Database' icon on the PC's desktop or in the PC's programs menu. To maintain the local information database, click the 'Local Information Maintenance' icon in the PC's programs menu.

## Worksheet H - Update your programs

The local information is designed to allow you to distribute changes to the local information system programs without having to go round them all individually.

Each time you run one of the main local information system programs on a PC, the system checks to see if there is an update and, if there is, it downloads it to the PC automatically.

This worksheet assumes you have received a program update from us and that you want to release it on your network.

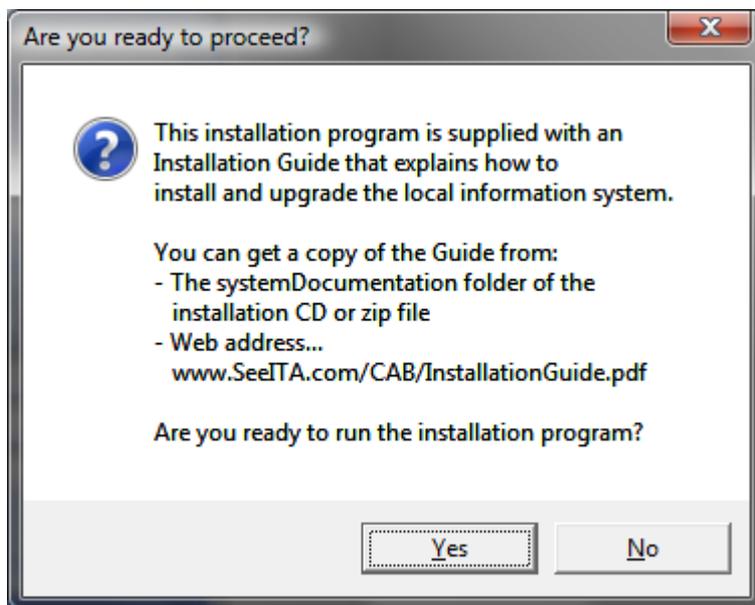
Before you start, make sure you have a recent backup copy of the database. You shouldn't need this backup - but it's as well to be cautious.

Decide which PC you will run the install from. To avoid confusion over addresses **do not use the central PC to run the installation program**. Instead, you can use any of the other PCs that will run the local information programs. That way you can be sure the address you use for the central PC can be accessed from other PCs in the network.

Copy the Installation media into your chosen PC<sup>9</sup>.

Run program CABNetworkInstall.exe which you will find in the top level folder of the update.

You will see this screen:



Click 'Yes' to go to start set up.

---

<sup>9</sup> If it helps, you can copy the unzipped installation media to a memory stick and run the install program from there.

You will see a screen like this:

Update the Local Information System

Specify the address of the Local Information System database:

**Search engine**

Google  Bing  Other  None

Prefix:

Suffix:

**Soft button A**

Unused  Index search  Web address  Document

Caption:

Tooltip:

Parameter:

Number of days for new items:

**Current version:**

**Bureau name:**

Hide document addresses

In document references, replace:

with:

**Soft button B**

Unused  Index search  Web address  Document

Caption:

Tooltip:

Parameter:

Number of days for new items:

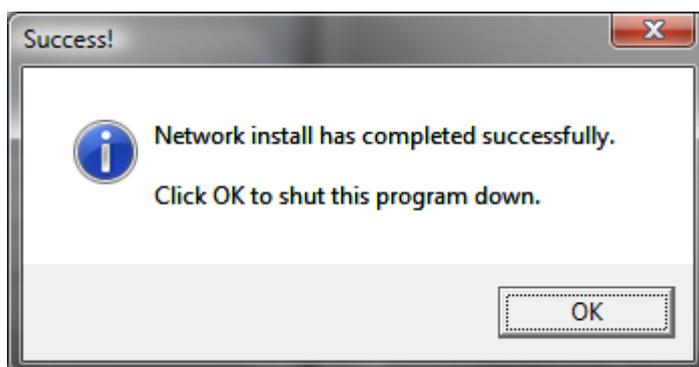
v3.0

Select option 'Upgrade a version 2 or 3 system'. If you used the default file locations for the local information programs, the program will identify the database location for you automatically. Otherwise you will need to enter the address of the database in the 'Location for the database' box or browse to it using the 'Browse' button.

All the other data entry boxes on the form will be disabled automatically. You do not need them to perform an upgrade.

Click 'Install the database'.

You will see:



Click 'OK'.

The local information system will then distribute the new version to all the PCs automatically. Note that if you use Windows 10, Windows 8, Windows 7, Vista or 'Limited user' accounts (see page 4 for more information), someone with 'administrator' access will need to run the local information system on each PC to implement the change. 'Limited user' accounts will not have the authority needed to make the change.

You have completed this worksheet.

## Worksheet I – Update configuration details

The local information is designed to allow you to distribute changes to the local information system programs without having to go round them all individually.

Each time you run one of the main local information system programs on a PC, the system checks to see if there is an update and, if there is, it downloads it to the PC automatically.

This worksheet assumes that you want to change the configuration data held on the PCs. Currently, this is:

- Search engine information.
- Your bureau's name (shown when searching the local information database).
- Whether you want to show the full document address next to document links in the reader program, or not.
- Whether you want to replace part of all document references with something else. This is mainly used if you move the system to a different central PC (see worksheet J).
- Activation of soft buttons.

Run program CABLIUpdater.exe which you will find in directory C:\Program Files\CITA\CABLocalInformation of any PC that runs the local information system.

You will see a screen like this:

Update the Local Information System

Specify the address of the Local Information System database:

Browse to the database

Get data from the system

Search engine

Google  Bing  Other  None

Prefix:

Suffix:

Current version:

Bureau name:

Hide document addresses

In document references, replace:

with:

Soft button A

Unused  Index search  Web address  Document

Caption:

Tooltip:

Parameter:

Number of days for new items:

Soft button B

Unused  Index search  Web address  Document

Caption:

Tooltip:

Parameter:

Number of days for new items:

Update

v3.0

Get help

Cancel this change

Note that the program will try to find the local information database and the installation information for you. If it can't, it will display a message explaining why. You will then need to enter the database location manually and click 'Get data from the system' to retrieve the installation information.

Decide which search engine you want to use. If you want to use something other than Bing or Google you will need to specify a prefix and, possibly a suffix. If you are not sure what to use, we suggest you click 'Bing' as it seems to us that it finds UK-specific information more easily than Google. To find out more about alternate search engines, click the 'Get help' button.

Enter your bureau's name in the 'Bureau name box'. This will appear in the text shown when people start the local information database and in the heading of that screen. For example, we use "Epsom and Ewell". By default, the system appends "Citizens Advice Bureau" to the bureau name. You can suppress that by adding a trailing "-" to the bureau name.

Check the 'Hide document addresses' box if you prefer not to show the full document address next to document links in the reader program. If in doubt, leave this box unchecked (you can change your mind later).

If you want to update all document links so that, for example, they point to a different PC, enter the text you want to replace in the 'In document references, replace:' box and the replacement text in the next box. For example, if you have moved the documents from a PC called PC1 to one called PC2, you would enter: "\\PC1\" in the first box and "\\PC2\" in the second box.

Decide whether you want to show 0, 1 or 2 soft buttons in the left hand pane of the reader program. Select the radio button corresponding to the action you want each button to take:

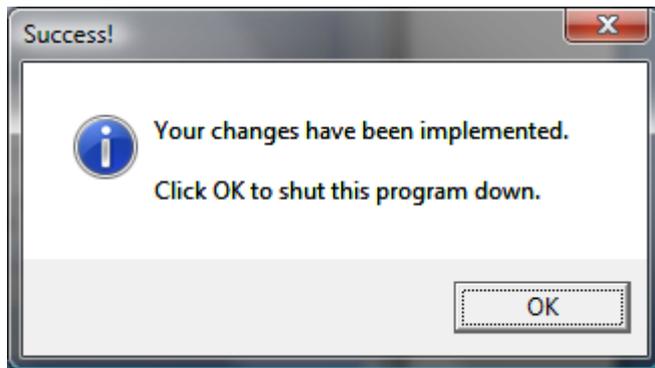
- **Unused.** The button will not appear in the reader program. You don't need to enter anything else for this button.
- **Index search.** The button will run a search on the database as if the user had entered one or more search terms and pressed the 'Search' button. For example, in Epsom & Ewell we create a 'Local news' button to list all entries containing the search term "adviser". This displays all entries relating to the bureau itself giving us a simple Intranet. Put the search term you want to use in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it. You will also need to define how many days back the program should look for new items when deciding whether to flash the button in red with the text "Recent update"; specify zero if you do not want people to be alerted to updates.
- **Web address.** The button will display a web page. That could be an often-used web page, or it could be a link to a page that displays a list of useful links. Put the address of the web page you want to show in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it.
- **Document.** The button will display a document from your network. For example, it might be a policy document or an attendance rota.

It is likely you will know of several web pages and documents that people will want to access frequently. You can put all these links into a single web page held in your network and point a soft button to it. To find out more, see worksheet M – Create a 'frequently used links' soft button.

Increment the version number. We suggest you add “.a” to the version number we provide when making the first change, “.b” for the next change and so on. So, to make a configuration change when the version number shows 2.3, change the version number to 2.3.a. This will instruct the local information system to download your changes automatically.

Click ‘Update’.

You will see:



Click ‘OK’.

You have completed this worksheet.

## Worksheet J - Move the system to a different central PC

This worksheet assumes you have already set up a central PC for the local information system and you now want to use a different central PC. For example:

- Your office has installed a new server, and you want to transfer your database to it.
- You have tried the system on a stand-alone PC and you are now ready to move the database to a central PC so that everyone in your office can use it.

Before you start, make sure you have a recent backup copy of the database. You shouldn't need this backup - but it's as well to be cautious.

Decide which PC you will run the install from. To avoid confusion over addresses **do not use the new central PC to run the installation program**. Instead, you can use any of the other PCs that will run the local information programs. That way you can be sure the address you use for the central PC can be accessed from other PCs in the network.

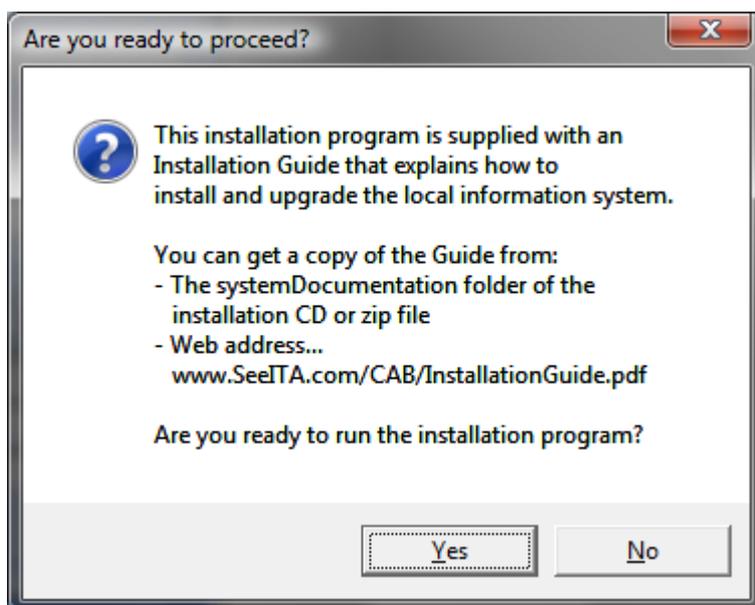
The PC you use will need access to the database at the old location. If the old database is not available on the network, you will need to copy it to the PC before you start (the location doesn't matter and you can delete the database when you've finished).

Copy the Installation media into your chosen PC<sup>10</sup>.

Install .NET 1.1 - see page 65 for more detail. Install the Microsoft Access Database Engine - see page 68 for more detail<sup>11</sup>.

Double-click CABNetworkInstall.exe. It's in the top-level directory.

You will see this screen:



<sup>10</sup> If it helps, you can copy the unzipped installation media to a memory stick and run the install program from there.

<sup>11</sup> You can skip installation of .NET and Microsoft Access Database Engine if you know they are already installed – you can run both installers from a memory stick.

Click 'Yes' to go to start set up.

Enter the full address of the new location for the database in the first box. So, if the database is to be installed in folder \\Server\Public\LocalInformation, you would enter “\\Server\Public\LocalInformation\LocalInformation.mdb”.

Click ‘Install using an existing database from a different location’ to select it. The ‘Location of existing database’ box is enabled. Enter the location of the database on the **old** server here.

Decide which search engine you want to use. If you want to use something other than Bing or Google you will need to specify a prefix and, possibly a suffix. If you are not sure what to use, we suggest you click ‘Bing’ as it seems to us that it finds UK-specific information more easily than Google. To find out more about alternate search engines, click the ‘Help’ button.

Enter your bureau’s name in the ‘Bureau name box’. This will appear in the text shown when people start the local information database and in the heading of that screen. For example, we use “Epsom and Ewell”. By default, the system appends “Citizens Advice Bureau” to the bureau name. You can suppress that by adding a trailing “-” to the bureau name.

Check the ‘Hide document addresses’ box if you prefer not to show the full document address next to document links in the reader program. If in doubt, leave this box unchecked (you can change your mind later).

It is likely that you will be changing the location of the documents linked from the local information database at the same time. That's no problem if you use a drive letter that will be changed to point to the new location. However, it's more of a problem if you refer to the PC that stores the documents by name. If so, enter the text you want to replace in the 'In document references, replace:' box and the replacement text in the next box. For example, if you are moving the documents from a PC called Server to a folder called 'Key Documents' on a PC called NewServer, you would enter: "\\Server\" in the first box and "\\NewServer\Key Documents\" in the second box. The system will automatically convert a document reference like "\\Server\LI\MyExcelDoc.xls" to "\\NewServer\Key Documents\LI\MyExcelDoc.xls".

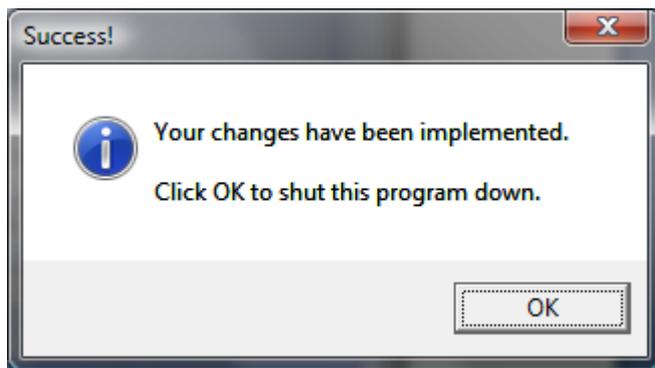
Decide whether you want to show 0, 1 or 2 soft buttons in the left hand pane of the reader program. Select the radio button corresponding to the action you want each button to take:

- **Unused.** The button will not appear in the reader program. You don't need to enter anything else for this button.
- **Index search.** The button will run a search on the database as if the user had entered one or more search terms and pressed the 'Search' button. For example, in Epsom & Ewell we create a 'Local news' button to list all entries containing the search term "adviser". This displays all entries relating to the bureau itself giving us a simple Intranet. Put the search term you want to use in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it. You will also need to define how many days back the program should look for new items when deciding whether to flash the button in red with the text "Recent update"; specify zero if you do not want people to be alerted to updates.
- **Web address.** The button will display a web page. That could be an often-used web page, or it could be a link to a page that displays a list of useful links. Put the address of the web page you want to show in the Parameter box. You will need to define the caption that appears on the button and the tooltip that appears if you hover your mouse over it.
- **Document.** The button will display a document from your network. For example, it might be a policy document or an attendance rota.

It is likely you will know of several web pages and documents that people will want to access frequently. You can put all these links into a single web page held in your network and point a soft button to it. To find out more, see worksheet M – Create a 'frequently used links' soft button.

Now click 'Install the database'.

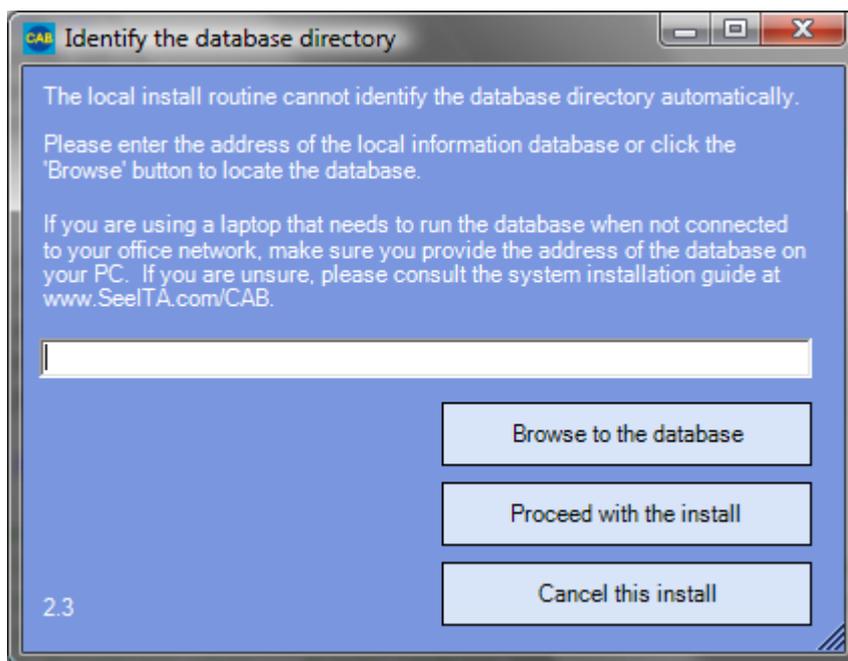
After a short while, you should see this message:



Click 'OK'.

### **If you have just one or two PCs using the old version of the database**

Simply delete the database folder and any subfolders from the **old** location. When you try to run the local information system on the PCs you will see an error message and this screen:



Enter the location of the database at its **new** location in the box and click 'Proceed with the install'. The programs on that PC will start to use your new location automatically.

## If you have several PCs using the old version of the database

Run program CABLIUpdater.exe in directory C:\Program Files\CITA\CABLocalInformation. You will see a screen like this:

Update the Local Information System

Specify the address of the Local Information System database:

Search engine

Google  Bing  Other  None

Prefix:

Suffix:

Current version:

Bureau name:

Hide document addresses

In document references, replace:

with:

Soft button A

Unused  Index search  Web address  Document

Caption:

Tooltip:

Parameter:

Number of days for new items:

Soft button B

Unused  Index search  Web address  Document

Caption:

Tooltip:

Parameter:

Number of days for new items:

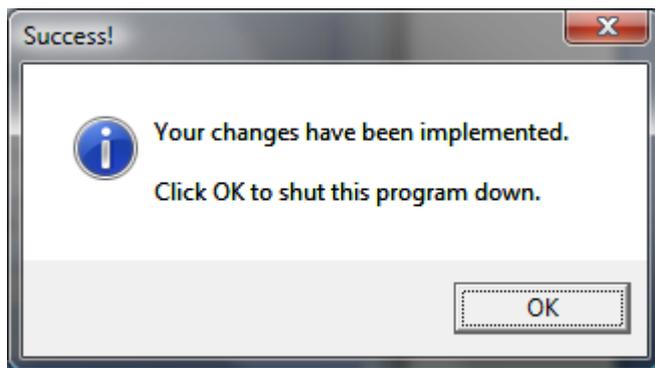
v3.0

Note that the database location in the first box points to the **old** location. Note the version number. Change the first text box to the **new** location of the database and click 'Get data from the system'.

Update the version number by incrementing the version number from the **old** location. We suggest you add ".a" to the previous version number unless it already ends with ".a" in which case, use ".b" (or ".c", and so on). So, for example, if the previous version number shows 2.1 change the version number to 2.1.a.

Click 'Update'.

You will see:



Click 'OK'.

Now delete subdirectory systemObjects from the **old** directory. Copy the systemObjects directory from the **new** location to the **old** location. Delete any file starting with "Version" from the database directory at the **old** location. Copy the file starting with "Version" from the **new** location to the **old** location. This will instruct the PCs to update themselves automatically. We suggest you also delete the database file (usually LocalInformation.mdb) from the **old** location to make sure that programs do not use the old version by mistake.

### **That's it**

You have completed this worksheet.

## Worksheet K - Repair a PC setup

This worksheet repairs problems with the way the PC is set up. For example, it can:

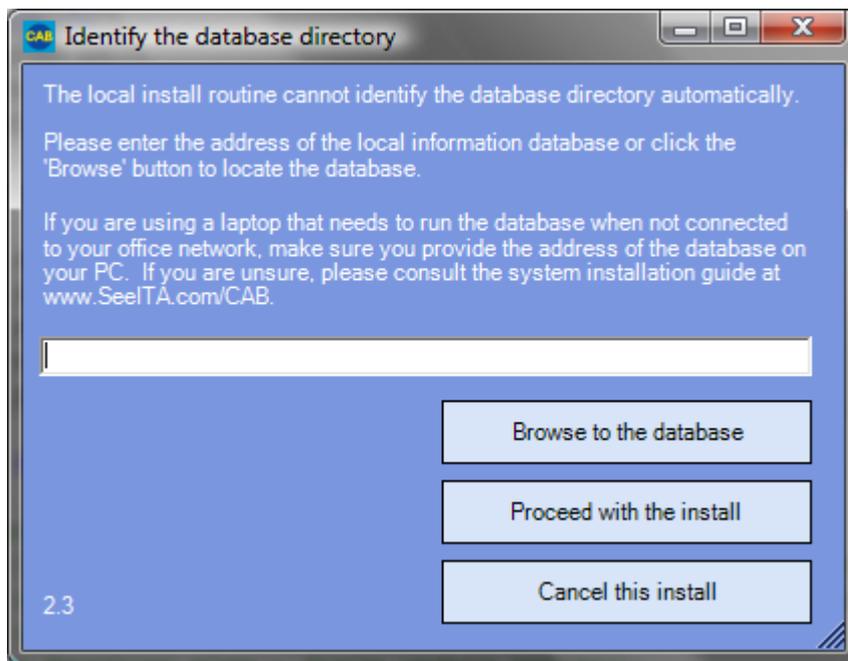
- Reinstall the program icons; or
- Restore the files needed by the local information system.

If you use Windows NT, XP, Vista, Windows 7, Windows 8 or Windows 10, you will need to log in to the PC as an Administrator. If you are unsure what that means, try the install anyway. If you see security error messages, you should make sure you have administrator status before trying again.

Look for program CABLocalInstall.exe in directory C:\Program Files\CITA\CABLocalInformation.

If you are running Windows 10, Windows 8, Windows 7 or Vista, right click CABLocalInstall.exe and click 'Run as Administrator' and confirm your authorisation to the User Account Control (UAC) screen. Otherwise, double-click CABLocalInstall.exe.

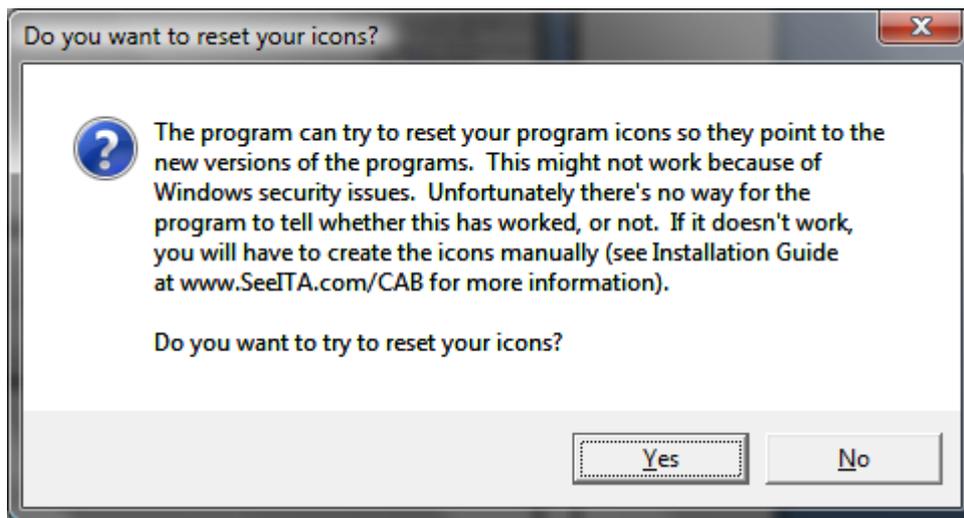
You will see a screen like this:



Depending on the nature of the problem you are repairing, the program might show the location of the local information database in the box. If the location is missing or incorrect, you will need to enter the correct one. The 'Browse to the database' button is there to help you do that.

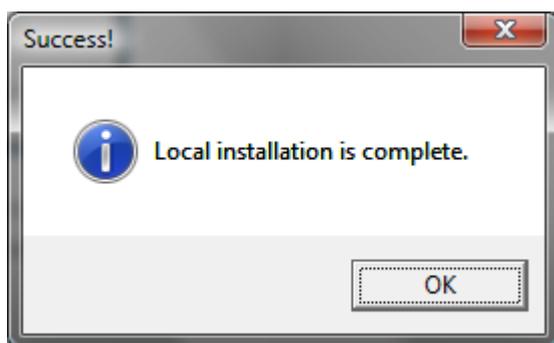
Click 'Proceed with the install' to repair the PC set up.

You will then see this message:



Click 'Yes' and the program will attempt to reset the local information system icons for you.

You will then see this message:



Click 'OK'.

You have completed this worksheet.

### **If you encounter a problem when using this worksheet**

Or if the repair procedure is ineffective...

We suggest you switch to worksheet C - New install to a PC.

If you encounter problems with that worksheet you might need to uninstall the local information first. Go to the PC's control panel, double-click 'Add or remove programs' and look for 'CAB local information system'. Click the heading and then click the 'Remove' button to uninstall the software. Then go back to the 'New install to a PC' worksheet.

## Worksheet L - Install program icons manually

Icons to run the Local Information database programs are normally created for you automatically by the install programs.

If there are any problems with the automatic process, you can use this worksheet to create the icons manually. You might also want to use this worksheet to replace the automatically installed icons if you need to.

To use any of the following procedures you will need administrator access for the PC.

First, delete any existing icons by right-clicking them and selecting 'Delete'. You will find them:

1. On the PC desktop
2. In the 'All programs' section of the Start menu
3. In the Windows 8 start screen

Simply right-click the icon and select 'Delete' or – in the case of the W8 start screen – right click and select 'Unpin'.

You might see warnings that you are affecting all users. That's OK.

There are two programs that normally require icons:

1. The main database program that allows advisors to use the Local Information database. We create this program's icon on the desktop for all users and in the Start menu for all users.
2. The maintenance program. We create this program's icon only in the Start menu.

These programs are installed, by default, into folder C:\Program Files\CITA\CABLocalInformation on each PC. However, we do not run them directly. Instead we run them via a program called CABLocalInstall.exe. It is this program that looks to see if there are any updates to be implemented before running the program.

### To create a desktop icon for the reader program

That's the program advisers use to search the local information database...

1. Right click program CABLocalInstall.exe and click Copy
2. Navigate to the desktop
3. Right click a blank space on the desktop and click 'Paste shortcut'; this will create a shortcut called 'Shortcut to CABLocalInstall.exe' or something similar.
4. Right click the icon, click 'Rename' and enter "Local Information Database" (or whatever you like) and press Enter
5. Right click the icon and click 'Properties'. In the 'Target' box, add a space and L at the end of the box. Note that if the existing entry ends with ", put space L **after** the ".
6. Press OK.

Double click the icon to make sure it runs the reader program successfully.

## To create a desktop icon for the maintenance program

Use the same procedure as for the reader program but:

1. Name the icon “Local Information Maintenance” or similar
2. Add space M to the end of the target box instead of space L.

## To create a menu icon for all users

First create the icon on the desktop using one of the above procedures.

Right click the icon you want in the menu and select ‘Copy’.

Now navigate to the directory that contains menu items for all users. By default that is C:\Documents and Settings\All Users\Start Menu\Programs or, in Windows 10, Windows 8, Windows 7 or Vista, C:\Program Data\Microsoft\Windows\Start Menu\Programs. Right-click the directory where you want the icon to appear and click ‘Paste’.

Note that some of the above directories might be hidden. You can make them visible (and hide them again) with the ‘Folder options’ program in the Control Panel and available via the Explorer toolbar.

## To create a menu icon for just one user

Use the procedure described in the previous section but instead of navigating to directory C:\Documents and Settings\All Users\Start Menu\Programs, look for directory C:\Documents and Settings\xxx\Start Menu\Programs where xxx is the login id for the user. Or, if you are using Windows 10, Windows 8, Windows 7 or Vista, look for C:\Users\xxx\AppData\Roaming\Microsoft\Windows\Start Menu\Programs.

## To create a desktop icon for all users

The procedures above that create desktop icons, create them only for the current user. To create a desktop icon for all users, use the same procedure as ‘Create a menu icon for all users’ but:

- Cut the icon instead of copying it
- Paste the icon into directory C:\Documents and Settings\All Users\Desktop or, if you are using Windows 10, Windows 8, Windows 7 or Vista, C:\Users\Public\Public Desktop.

## To add the reader or maintenance programs to the Windows 7/8/10 Task Bar

The normal procedure is to right click a program’s icon in the task bar while it is running and click ‘Pin to Taskbar’. You should not do this for the reader and maintenance programs because you will by-pass the program we use to test for updates. Instead:

- Create the icon you need on the desktop if you haven’t done so already
- Test it to make sure it works
- Right click the icon and select ‘Pin to Taskbar’

You can then delete the desktop icon if you want.

When you run the program from the Taskbar, a second icon will appear – that’s OK. It’s the actual program rather than the one that tests for updates.

### **To add the reader or maintenance programs to the Windows 8 Start Pane**

Use the procedure to add a program to the Windows 8 Task Bar but instead of selecting ‘Pin to Taskbar’, select ‘Pin to Start’.

## Worksheet M – Create a ‘frequently used links’ soft button

We provide two buttons – called soft buttons – on the local information system enquiry screen. You can configure these buttons to do different things based on your local requirements.

One option is to create a ‘frequently used links’ page. Clicking the soft button will display frequently used links which can include:

- Common web pages
- Common documents held in your network.

To create a ‘frequently used links’ soft button, follow these steps:

1. Create the ‘frequently used links’ web page
2. Update the local information system configuration to create a soft button pointing to the ‘frequently used links’ web page.

To help you, we have created a template for the web page. Using the template, you should be able to create the web page without needing any specific IT expertise.

The following sections provide more detail...

### Create the ‘Frequently used links’ web page

You can get the template – FrequentlyUsedLinksTemplate.html - from one of these locations:

- The systemDocumentation folder of the Installation media
- The systemDocumentation subfolder to the folder containing your local information database
- The CITA web site at: <http://www.SeelTA.com/CAB/FrequentlyUsedLinksTemplate.html>

Open the template using NotePad (Usually found in the Start menu by clicking ‘All programs’ and ‘Accessories’).

You will see instructions for adding links to the template. We have started you off by creating some common links for you. You can obviously delete any that are inappropriate to you.

To test your new page:

1. Save it to the systemDocumentation folder in the folder containing the local information database using the name “FrequentlyUsedLinks.html”.
2. Double-click the saved version of your file and you will see it appear in your web browser.
3. Click each link to make sure it works correctly.

## Create the soft button

Having created and tested your 'frequently used links' page, point one of your soft buttons to it.

Use Worksheet I – Update configuration details to set up the soft button. Decide which button you want to use and change its configuration like this:

1. Check the 'Document' option
2. Enter a caption for your button; for example: "Frequently-used links"
3. Enter a tooltip; for example: "Links to web pages and documents you might find useful"
4. In the parameter box, enter the address of your document. This will be the address of the folder containing the local information database followed by "`\systemDocumentation\FrequentlyUsedLinks.html`". For example, if the local information database is in folder `\\Server\LocalInformation`, the address of your page will be:  
`\\Server\LocalInformation\systemDocumentation\FrequentlyUsedLinks.html`

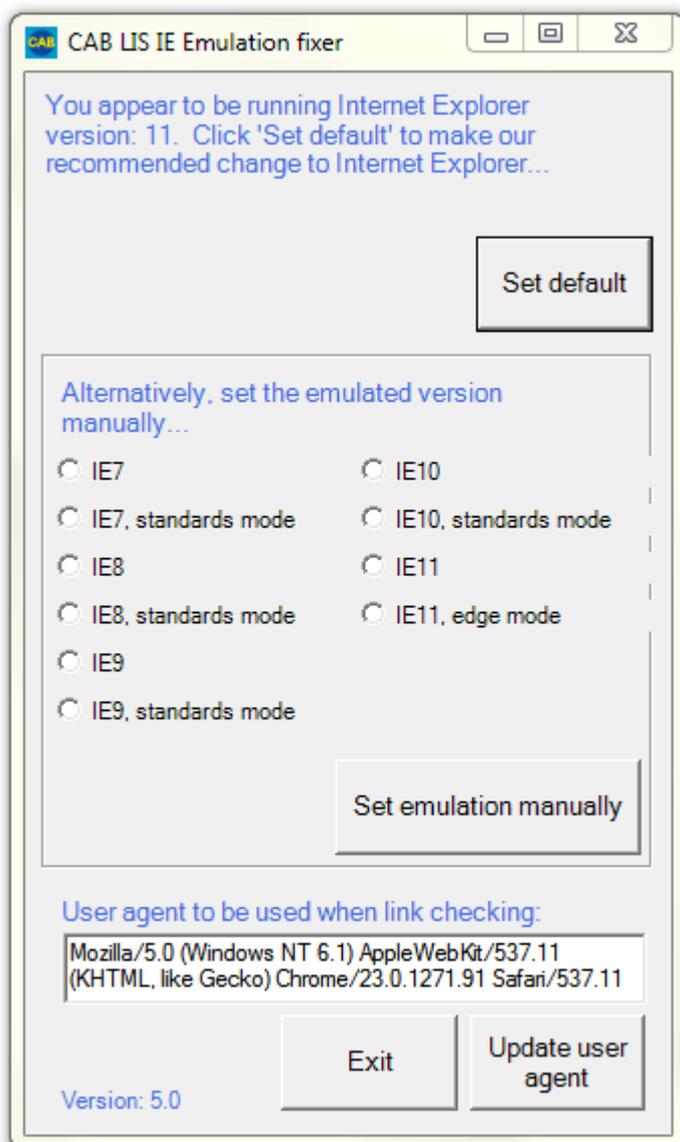
When you update the system configuration, the system will automatically distribute your new button to all the local information PCs in your network.

## Worksheet N – Make better use of Internet Explorer

By default, Microsoft switches on emulation of IE7 when the Local Information System enquiry program uses it to display search results and internet pages. IE7 is now a very old version and it does not work well with modern web pages. To change this behaviour requires a change to the Internet Explorer section of the Windows registry. This worksheet explains how to use a tool we provide to make that change.

You need to run a program called CABLISBrowserFix.exe. It is installed, by default, into folder C:\Program Files\CITA\CABLocalInformation on each PC. If you are using Microsoft Vista or later, you should run the program as an administrator:

- Log on to the PC as an administrator
- Right click CABLISBrowserFix.exe and click 'run as Administrator' (it's not enough to be logged on as an Administrator)
- Click 'Yes' when challenged by User Account Control (UAC)



This window appears when you run the utility.

Click 'Set default' to request that embedded versions of Internet Explorer operate as the latest version available.

Alternatively, if you have good reason, you can set the emulation version automatically.

We suggest you leave the User Agent string alone unless you know what you are doing or if you've been requested by us to make a change.

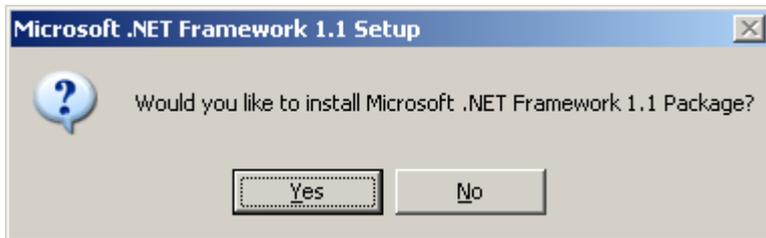
Having updated Internet Explorer you will see a confirmation page asking you to restart the Local Information System enquiry program to see the effect of your change.

*NB, unlike the other LIS tools, this one uses .NET 3.5. That should already be installed on most PCs, but you might need to install it on some older ones.*

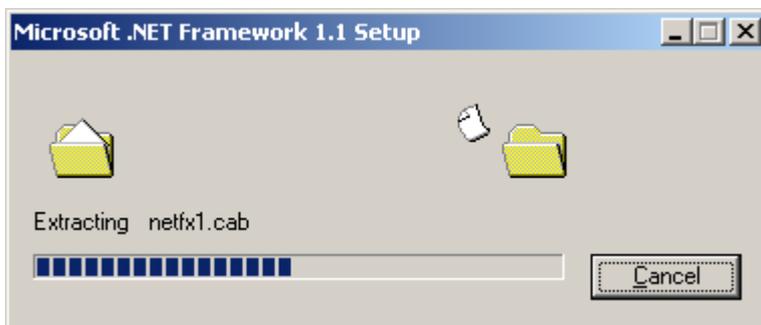
## Installing the .NET framework

The .NET 1.1 Framework installer is available for free from the Microsoft web site. We also link to it from [www.SeeITA.com/CAB/Downloads.shtml](http://www.SeeITA.com/CAB/Downloads.shtml)

The installation program displays this question...



Click 'Yes' to start the installation process and you will see a progress message like this...

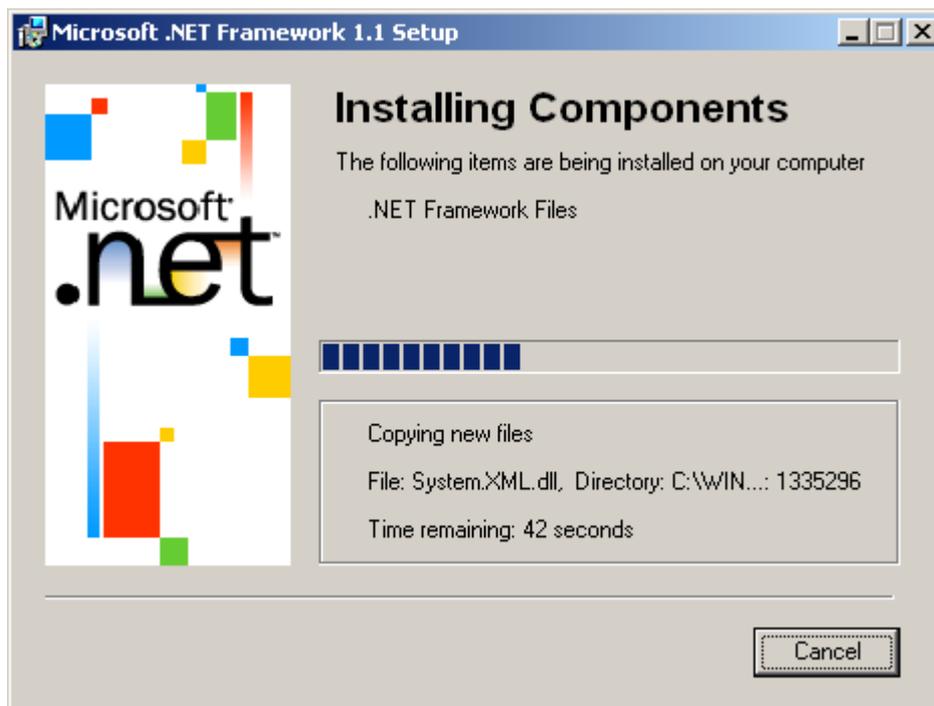


You will then see this request...



Click 'I agree' and 'Install'.

You will then see a progress message like this...



Finally, you'll see this message to tell you installation is complete...

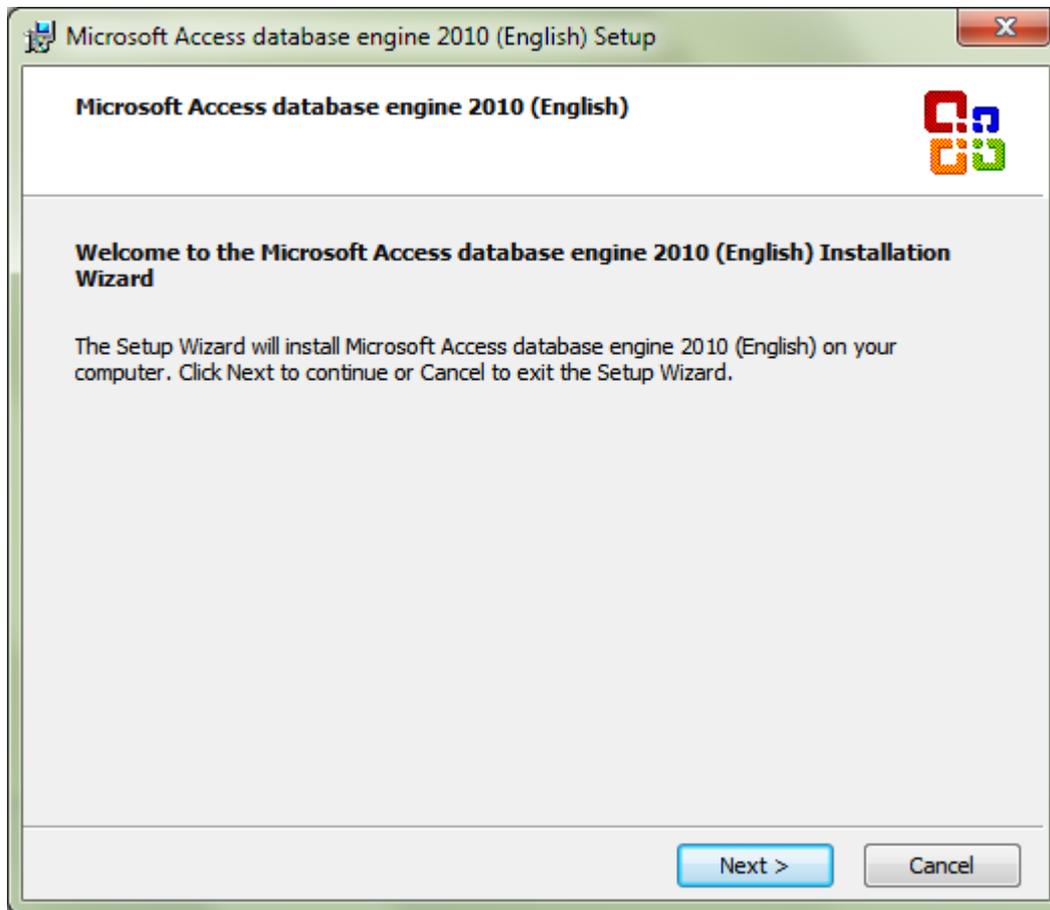


Note that installing the .net framework does not force a reboot. Click OK, to complete the installation process.

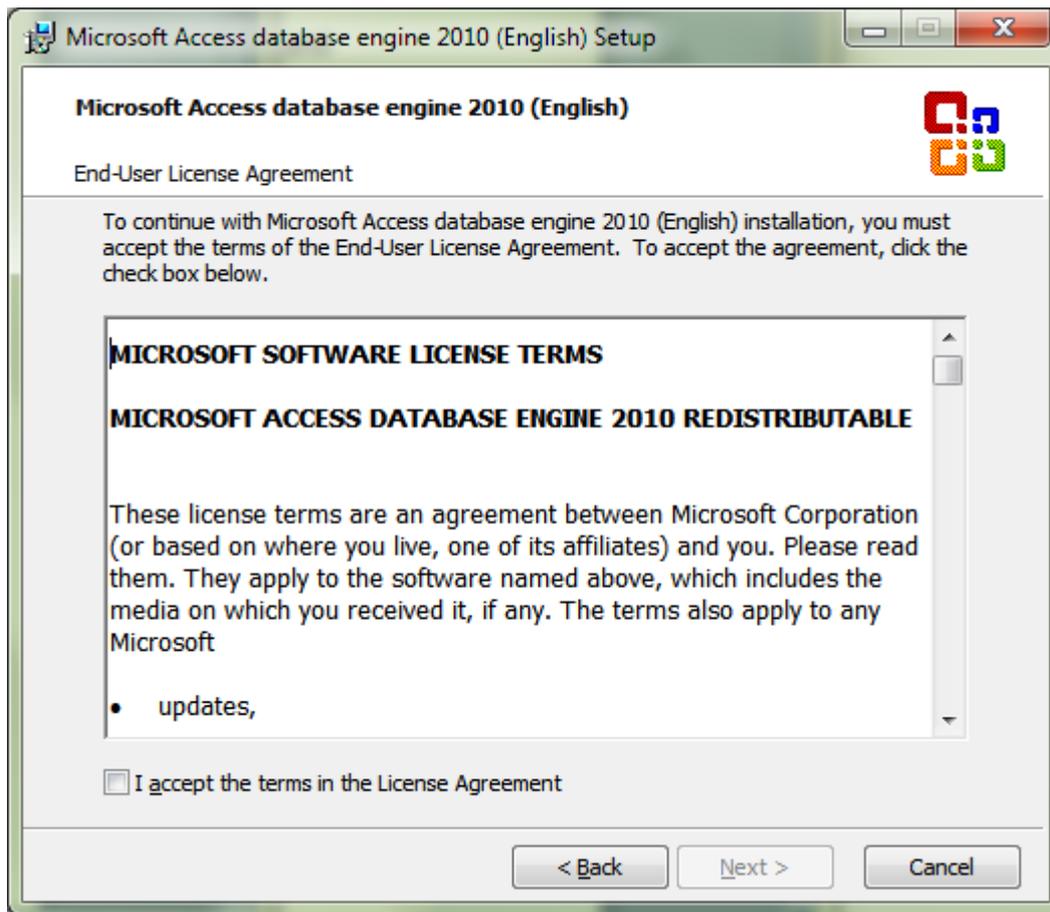
## Installing the Microsoft Access Database Engine

The Microsoft Access Database Engine installer is available for free from the Microsoft web site. We also link to it from [www.SeeITA.com/CAB/Downloads.shtml](http://www.SeeITA.com/CAB/Downloads.shtml)

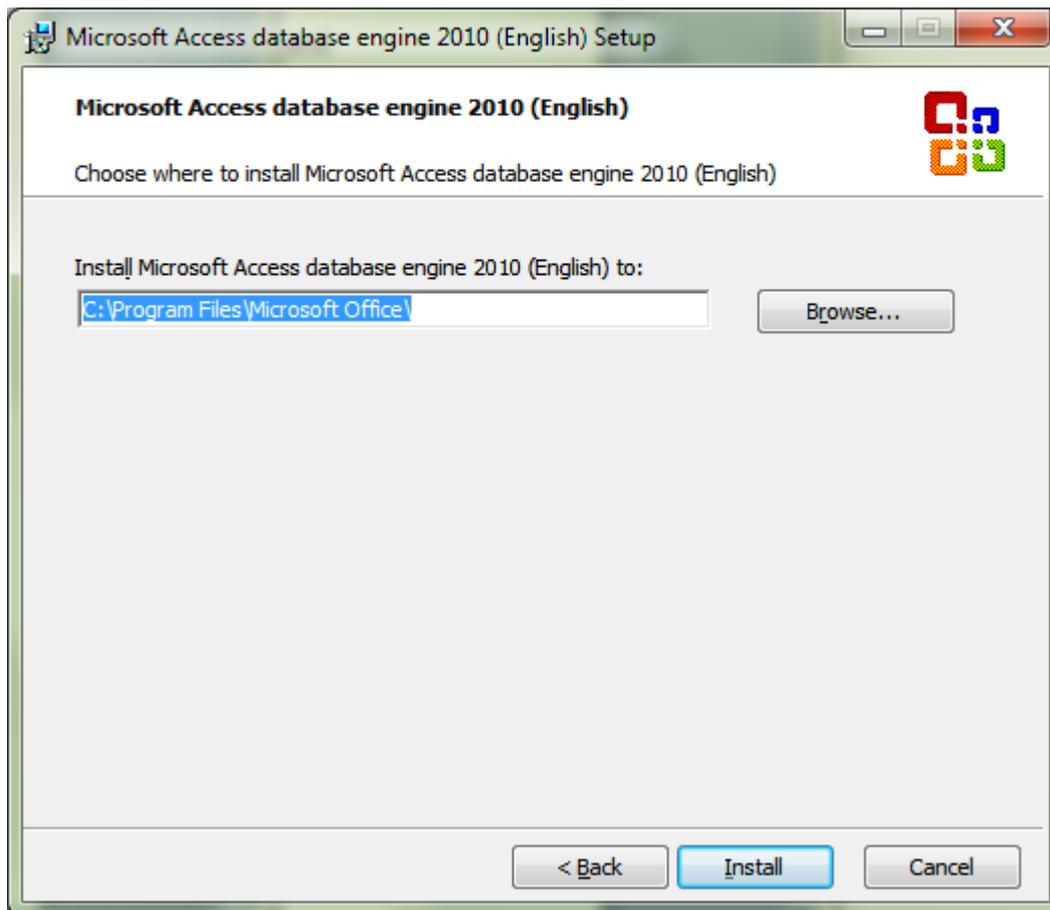
When you install MADE, you will see the following messages...



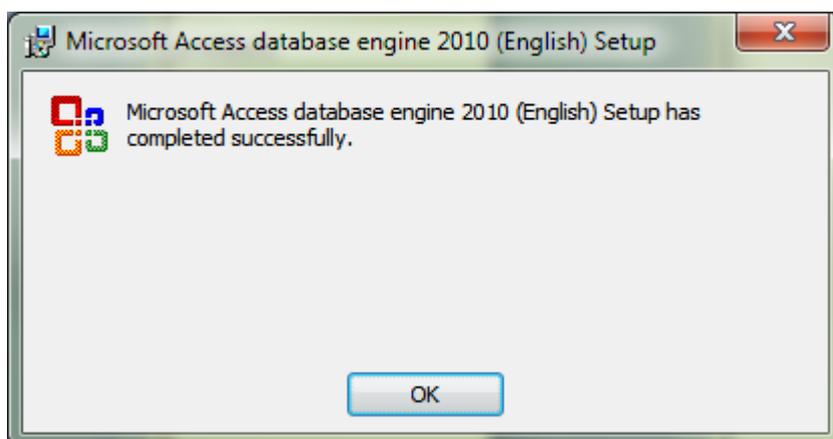
Click 'Next'



Tick 'I accept...' and click 'Next'



Click 'Install'



The software has installed correctly.