Claritas PrecisionCode 6.7

Installation Instructions

identify
deliver
optimize

Claritas PrecisionCode 6.7

Installation Instructions

CONTENTS

OVERVIEW

This document contains instructions on how to install Claritas PrecisionCode 6.7.

BEFORE YOU BEGIN

Make sure that you receive either of the following:

- An email containing instructions on how to download the Claritas PrecisionCode installation files using an Internet browser or a File Transfer Program (FTP) utility.

- Printed release documents and one USB flash drive containing the Claritas PrecisionCode software installation files.

Next Step

If you have not received Claritas PrecisionCode 6.7 via physical media, you are now ready to download the installation files. Proceed to the "Download the Claritas PrecisionCode Installation Files" section.

If you have received Claritas PrecisionCode 6.7 via physical media, you are now ready to install Claritas PrecisionCode. Proceed to the "System Requirements" section to check the requirements prior to installing Claritas PrecisionCode, and then proceed to the "Install Claritas PrecisionCode 6.7" section for the installation steps.

DOWNLOAD THE CLARITAS PRECISIONCODE INSTALLATION FILES

Important! Follow the instructions in this section only if you have received an email for downloading and installing the Claritas PrecisionCode files via an Internet browser or a File Transfer Protocol (FTP) utility program.

Before you can install Claritas PrecisionCode, you need to download the necessary installation files. You can download the installation files using one of the following:

- An Internet browser

- An FTP utility program (for example, WINFTP or FileZilla)

Download Files via an Internet Browser

Follow the procedure in this section to download the necessary installation files using an Internet browser.

1. Open your Internet browser and go to this site: https://securefiles1.claritas.com

2. Log in using the username you were provided and the password you established for the site.

   The Enterprise Managed File Transfer – Made Easy Home page appears.

3. On the left pane, click **Folders**. A list of folders that you can access appears.

4. Click the **PrecisionCode** folder then navigate to Current Version. A list of zipped files that you can download appears. Download the file that matches your Operating System.

   For Windows users, if you need to determine if you are using 32- or 64-bit version, follow the steps on this Microsoft page.

5. Click the zipped file that you want to download, and then click **Download**.
   Depending on your Internet browser, either a file download prompt appears below your screen or your file begins to automatically download to your **Download** folder.

   NOTE: If you have selected a file with a large size, it may take a while for the file download prompt to appear. We recommend that you wait until the file is ready for download.

   If a file download prompt appears, do the following:

   a. Click the **Save** drop-down/expand arrow.

   b. Click **Save As**. The Save As dialog box appears.

   c. Specify the location where you want to download the selected file, and then click **Save**. The selected zipped file gets downloaded to your specified location.

   If your selected zipped file is automatically downloaded, go to your Download folder and locate the downloaded file.

Note: If you want to download the file(s) to a different path, click Browse and then locate your desired download path.

If you get a "Do you want to run this application?" prompt, click **Run** to proceed with the download.

6. After successfully downloading the files, close the MFT page.

7. Extract the downloaded zipped files.

Note: Documents are contained in a separate zipped file.

Important! It is recommended that you do not delete any of the installation files until you have successfully completed your installation.

Download Files via an FTP Utility Program

Follow the procedure in this section to download the necessary installation files using an FTP utility program.

1. Open your FTP utility program and then type the following information in the appropriate text boxes:

    - **Host:** sftp:// securefiles.claritas.com

    - **Username and password:** Use the login username and password that you received via email.

    - **Port:** 22

    Once connected, the FTP utility program screen shows a list of available files that you can download.

2. Specify the location on your local drive where you want to download the files.

3. In the list of available files, select all the files that you want to download, and then click and drag the files to your specified location on your local drive. The system begins the download process.

4. After successfully downloading the files, close the FTP utility program.

5. Extract the downloaded zipped files.

    Note: Documents are contained in a separate zipped file.

    Important! It is recommended that you do not delete any of the installation files until you have successfully completed your installation.

Next Step

You have successfully downloaded the necessary installation files and are now ready to install Claritas PrecisionCode. Proceed to the next section, "System Requirements."

SYSTEM REQUIREMENTS

The following tables list hardware and software requirements for Claritas PrecisionCode 6.7. Make sure that your system meets the requirements listed in this table.

HARDWARE	OPTIMUM REQUIREMENTS
Processor	Intel® i5 processor or AMD™ equivalent
RAM/Memory	7 GB RAM for 64-bit
Free Disc Space	23 GB or higher
Monitor	At least 1366 x 768 screen resolution
USB Drive	USB port 2.0 or 3.0 for software delivery if physical delivery is required

SOFTWARE	OPTIMUM REQUIREMENTS
Operating Systems	Window 8 all versions (64-bit) Windows 10 all versions (64-bit) Windows Server 2012 Standard (64-bit) Windows Server 2016 All Versions (64-bit)
.NET Framework	The application installer must be able to install .NET Framework 4.6.
Microsoft® Office	If input or output files are specified as Excel, then Microsoft® Excel® version 2010 or higher must be installed locally. Note: See the Configure Microsoft Excel section for instructions on how to configure Excel so that it can be accessed from within PrecisionCode.

MISC	OPTIMUM REQUIREMENTS
Administrator Access	Administrator access is required to install several components of the application and to install a Windows service for job scheduling. **The application must be Run as Administrator** when processing any imported files that would also generate an output file. To do this: • Right click on the PrecisionCode desktop shortcut • Select Properties > Compatibility Tab • Check the 'Run as Administrator' checkbox
Disk Drives	All disk drives to be used must be assigned a permanent drive letter.
Patches	Interim patches (if required) will be delivered via Enterprise Managed File Transfer (via web or SFTP).

If your workstation does not meet these requirements, or if you are unsure of your workstation configuration, contact your IT department.

INSTALL CLARITAS PRECISIONCODE 6.7

The Claritas PrecisionCode 6.7 installer is a "smart installer" that automatically runs and installs the appropriate components regardless of whether your system comes with or without Claritas PrecisionCode 6.6.

Install Claritas PrecisionCode 6.7 to a System with Claritas PrecisionCode 6.6

**Important!** Follow the procedure in this section only if you have previously installed Claritas PrecisionCode 6.6 on your workstation or network server.

You can upgrade your Claritas PrecisionCode version 6.6 to version 6.7 by simply running the installation batch file that you either downloaded or received with your Claritas PrecisionCode 6.7 package.

1. Read the hardware and software requirements document and make sure that your system meets all the requirements.

2. Perform either of the following:

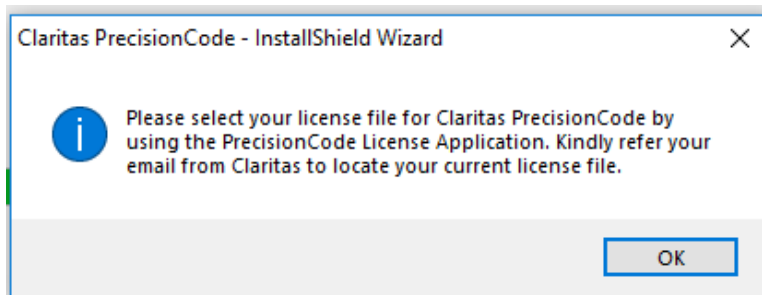| IF YOU HAVE…	DO THESE…
Downloaded the Claritas PrecisionCode installation files	a. Navigate to the location where you copied and extracted the zipped installation file. b. Double-click the **setup.exe** file.
Received the Claritas PrecisionCode installation files on a USB flash drive	a. Connect the USB flash drive that came with your Claritas PrecisionCode package to the USB port of your workstation. b. Navigate to the location of your USB flash drive and then double-click it. The contents of the USB flash drive appear. c. Double-click the **setup.exe** file.

A DOS screen showing the uninstallation process of Claritas PrecisionCode 6.6 appears.

3. Click **OK** to close the message box and proceed with the uninstallation of PrecisionCode 6.6. When the uninstall process completes, the Ready to Install the Program dialog box appears.
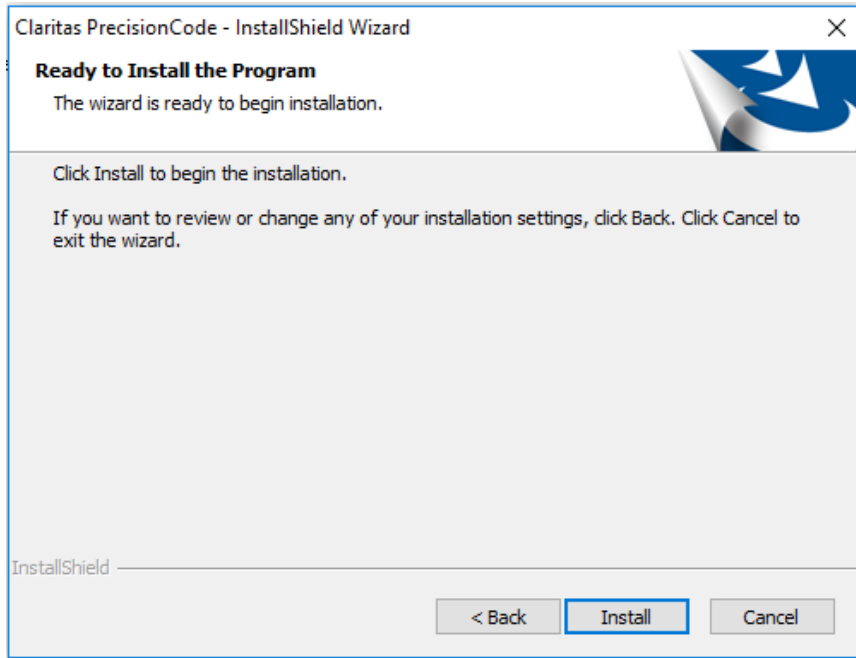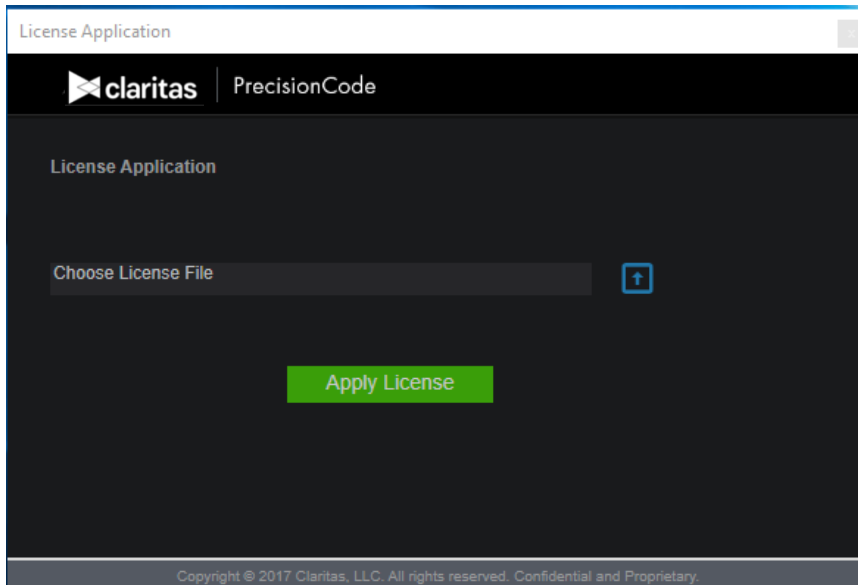

Click **Install** to begin the installation. When the Claritas PrecisionCode software installation completes, a message appears prompting you to select your Claritas PrecisionCode license file.

Note: The installation of Claritas PrecisionCode may take a while to complete. Do not close or cancel the installation status dialog box.

6

4. Click **OK**. The License Application screen appears.

5. Perform either of the following:

IF YOU HAVE...	DO THESE...
Downloaded the Claritas PrecisionCode installation files	a. Click the browse icon next to the **Choose License file** text box. b. Navigate to and locate where you downloaded your license (.LIC) file.
Received the Claritas PrecisionCode installation files on a USB flash drive	a. Click the browse icon next to the **Choose License file** text box. b. Navigate to the location of the USB flash drive. c. Locate the License folder and select the license (.LIC) file. The license path and file appears in the Choose License file text box.

6. Click **Apply License**. The installer applies your license file to make the appropriate data accessible to you, and then shows a successful license application message box.
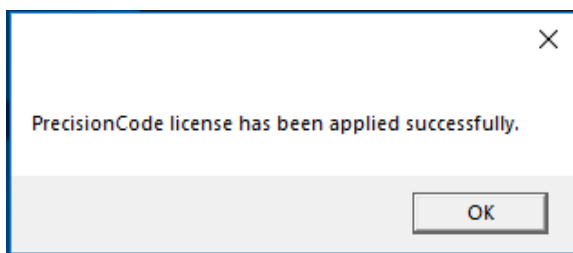
7. Click **OK** to close the message box. The InstallShield Wizard Complete dialog box appears.
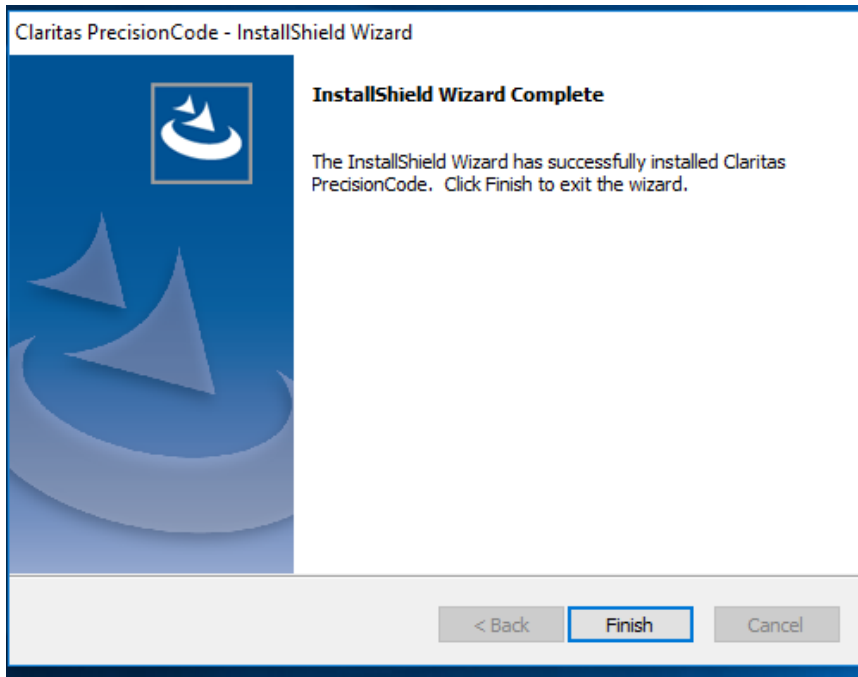
8. Click the **Finish** button to close the InstallShield Wizard Complete message box.

You have successfully installed Claritas PrecisionCode 6.7.

It is advised to restart your workstation prior to launching PrecisionCode for the first time.

What's Next

If you have not previously configured Microsoft® Excel® to operate as an interactive user, proceed to the "Configure Microsoft Excel" section.

If you have previously configured Microsoft Excel to operate as an interactive user, you are now ready to use the application. Proceed to the "Start Claritas PrecisionCode" section.

Install Claritas PrecisionCode 6.7 to a New Workstation or Network Server

Important! To install Claritas PrecisionCode, you must have at least 23 GB of available space on your workstation or network drive.

You can install Claritas PrecisionCode to a network location or to a local hard drive on your workstation.

1. Read the hardware and software requirements document, and make sure that your system meets all the requirements.

2. Perform either of the following:

IF YOU HAVE…	DO THESE…
Downloaded the Claritas PrecisionCode installation files	a. Navigate to the location where you copied and extracted the zipped installation file. b. Double-click the **setup.exe** file.
Received the Claritas PrecisionCode installation files on a USB flash drive	a. Connect the USB flash drive that came with your Claritas PrecisionCode package to the USB port of your workstation. b. Navigate to the location of your USB flash drive and then double-click it. The contents of the USB flash drive appear. c. Double-click the **setup.exe** file.

If the installer detects that your workstation does not have the necessary components such as Microsoft .NET Framework and SQLite™, a dialog box appears specifying that you need to install the detected missing components. Click Install to allow the installer to install the required components.
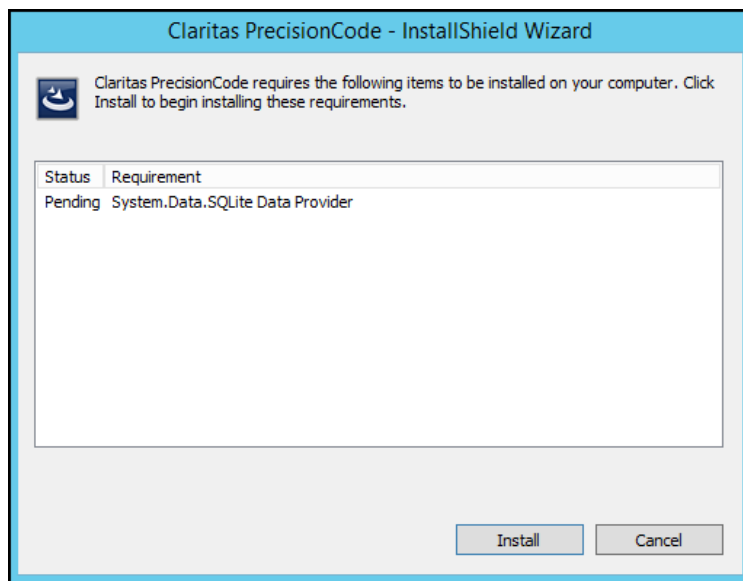
The installer installs the necessary components to your workstation, and when it completes the installation, the Welcome to the InstallShield Wizard for Claritas PrecisionCode dialog box appears.

If the installer detects that your workstation has the necessary components, the Welcome to the InstallShield Wizard for Claritas PrecisionCode dialog box appears. Proceed to the next step.
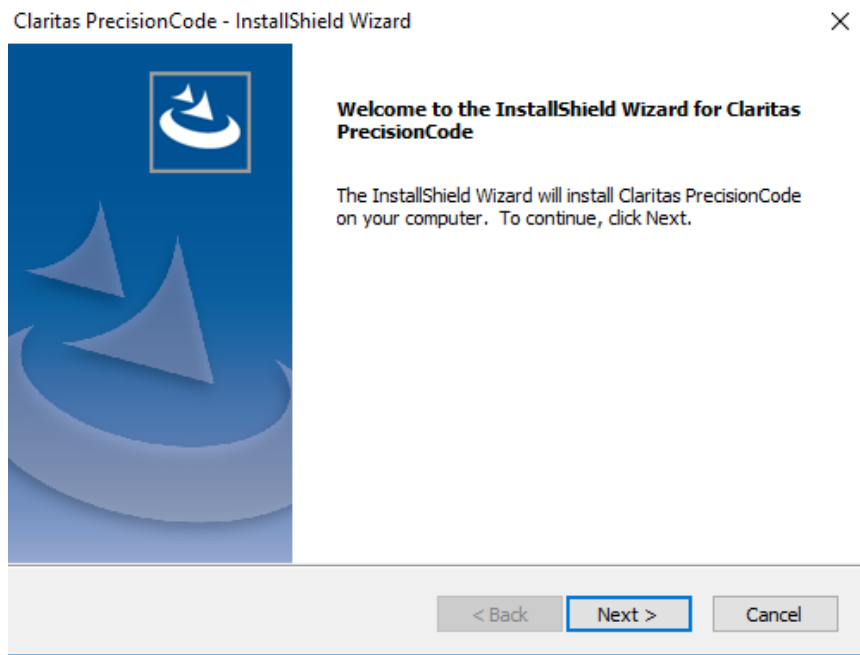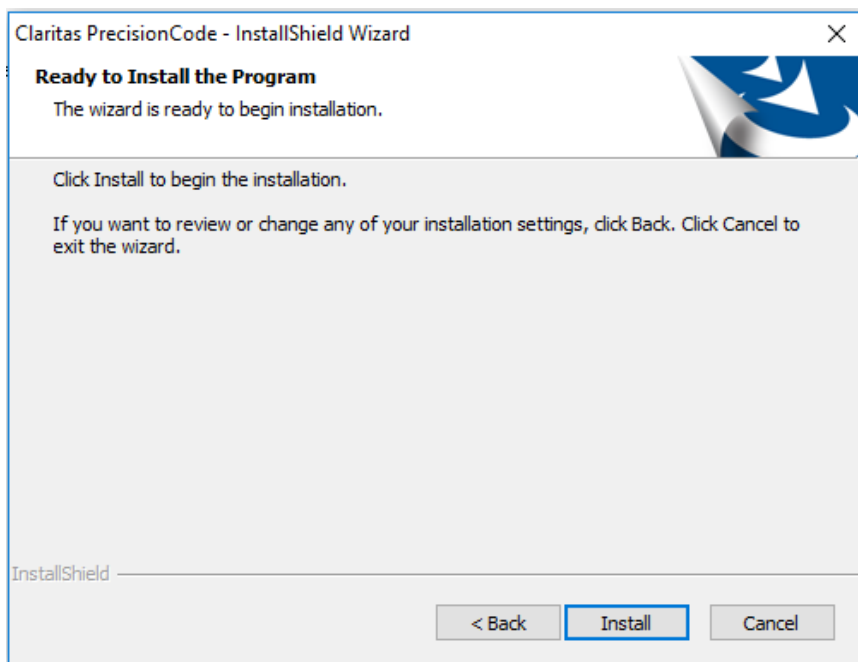
3. Click **Next**. The Choose Destination Location dialog box appears.
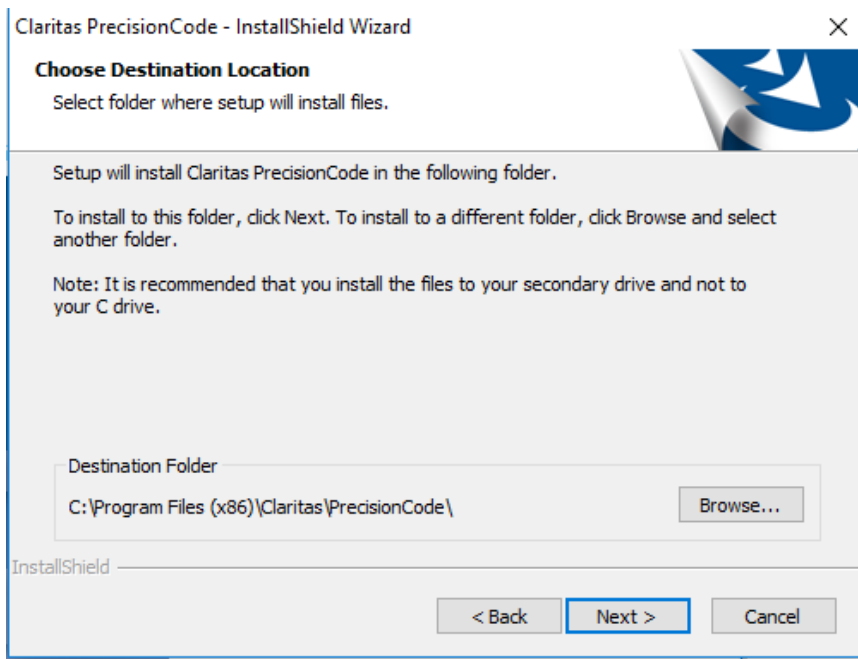
4. Click **Browse**, navigate to and select your desired destination for installing the files, and then click **Next**. The Ready to Install the Program dialog box appears.

    Note: It is recommended that you install the files to your secondary drive and not to your C drive.
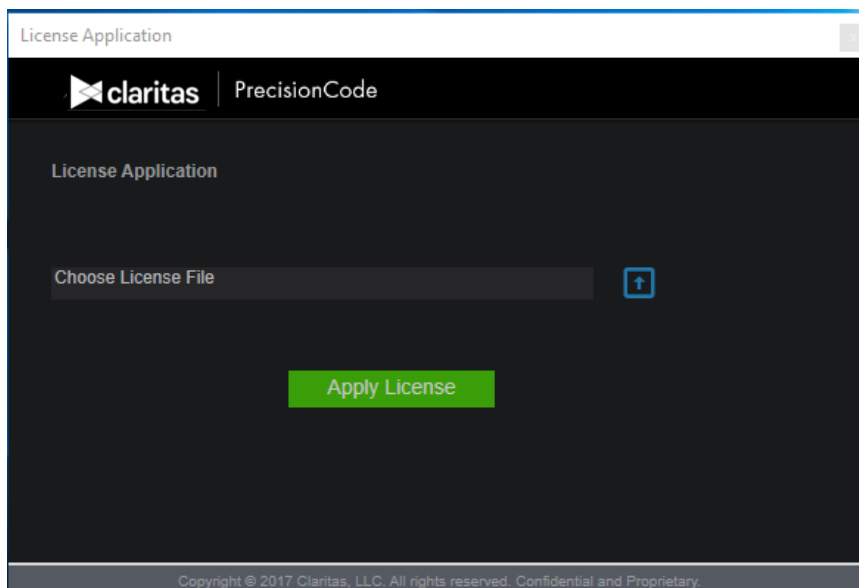
5. Click **Install** to begin the installation. When the Claritas PrecisionCode software installation completes, a message appears prompting you to select your Claritas PrecisionCode license file.

   Note: The installation of Claritas PrecisionCode may take a while to complete. Do not close or cancel the installation status dialog box.
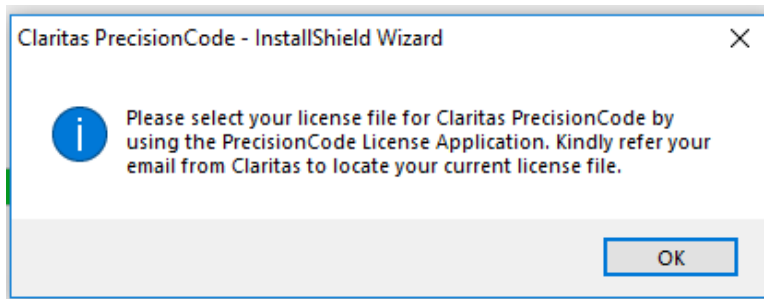

6. Click **OK**. The License Application screen appears.

7. Perform either of the following:

IF YOU HAVE…	DO THESE…
Downloaded the Claritas PrecisionCode installation files	a. Click the browse icon next to the **Choose License file** text box. b. Navigate to and locate where you downloaded your license (.LIC) file.
Received the Claritas PrecisionCode installation files on a USB flash drive	a. Click the browse icon next to the **Choose License file** text box. b. Navigate to the location of the USB flash drive. c. Locate the License folder and select the license (.LIC) file. The license path and file appears in the Choose License file text box.

8. Click **Apply License**. The installer applies your license file to make the appropriate data accessible to you, and then shows a successful license application message box.
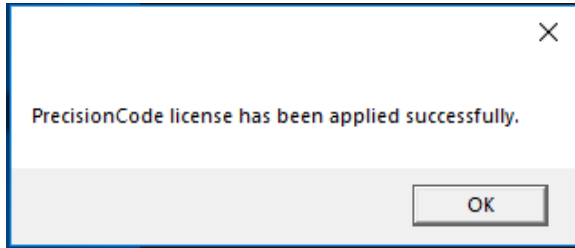
9. Click **OK** to close the message box. The InstallShield Wizard Complete dialog box appears.
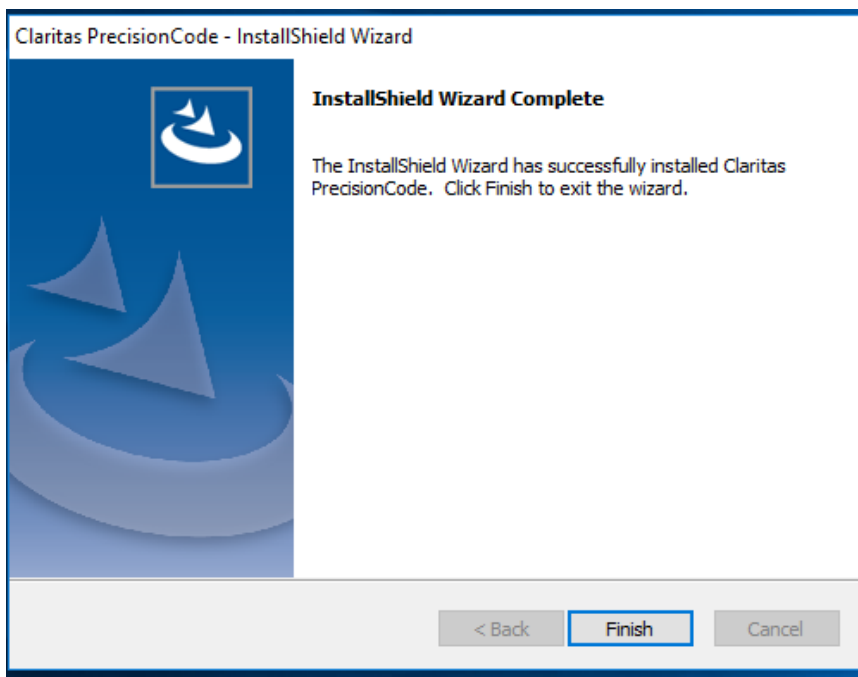
10. Click the **Finish** button to close the InstallShield Wizard Complete message box.

You have successfully installed Claritas PrecisionCode 6.7. You should see the PrecisionCode icon on your desktop.

It is advised to restart your workstation prior to launching PrecisionCode for the first time.

What's Next

If you have not previously configured Microsoft® Excel® to operate as an interactive user, proceed to the "Configure Microsoft® Excel®" section.

If you have previously configured Microsoft Excel to operate as an interactive user, you are now ready to use the application. Proceed to the "Start Claritas PrecisionCode" section.

CONFIGURE MICROSOFT® EXCEL®

Microsoft Excel must be configured to operate as an interactive user in order to access Excel functionality from within PrecisionCode.

Follow the steps in this section to configure Excel so that it can be accessed from within PrecisionCode.

1. Login to the server as an administrator.

    Note: You should have administrator rights if you are using your local machine. However, you may need to contact your system admin to check your log in rights.

2. On the Windows Start menu, click **Start** > **Run** or **Windows Key + R** then enter **taskmgr**.

3. Click the **Process** tab in task manager and check **Show Processes from all users**.

4. Locate any "Excel.exe" or Microsoft Excel entries in the list, right-click the entry and select **End Process** or **End Task**.
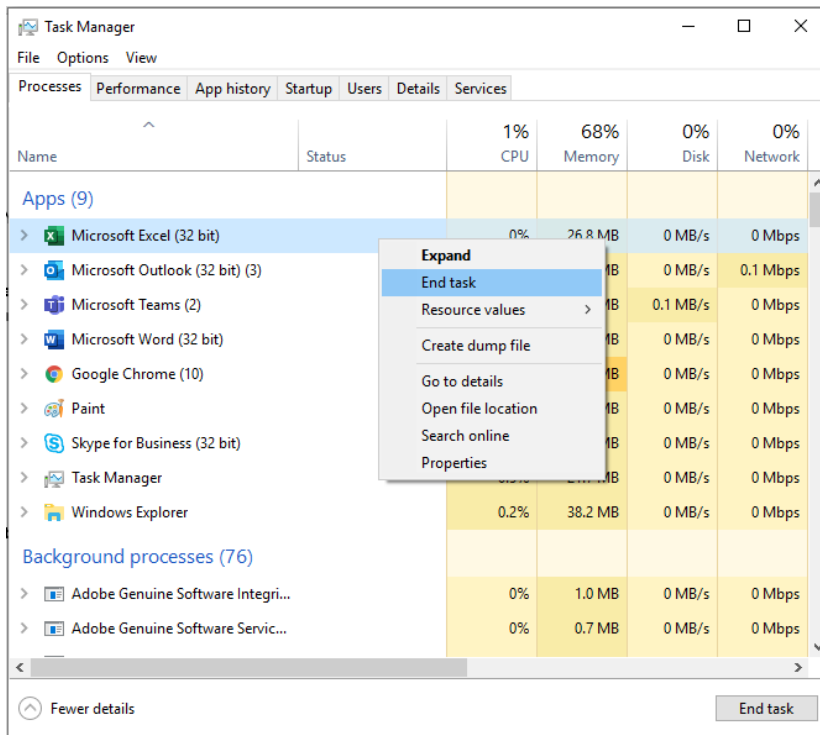
5. Close the task manager.

6. On the Windows Start menu, click **Start > Run** or **Windows Key + R** then enter **services.msc**.
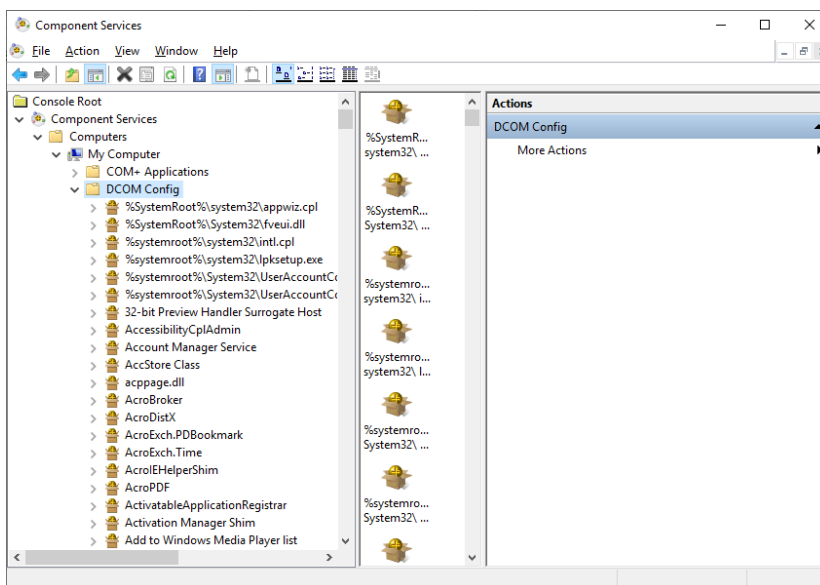
7. Locate PCodeScheduler. Select it and then click **Stop** to stop the service.
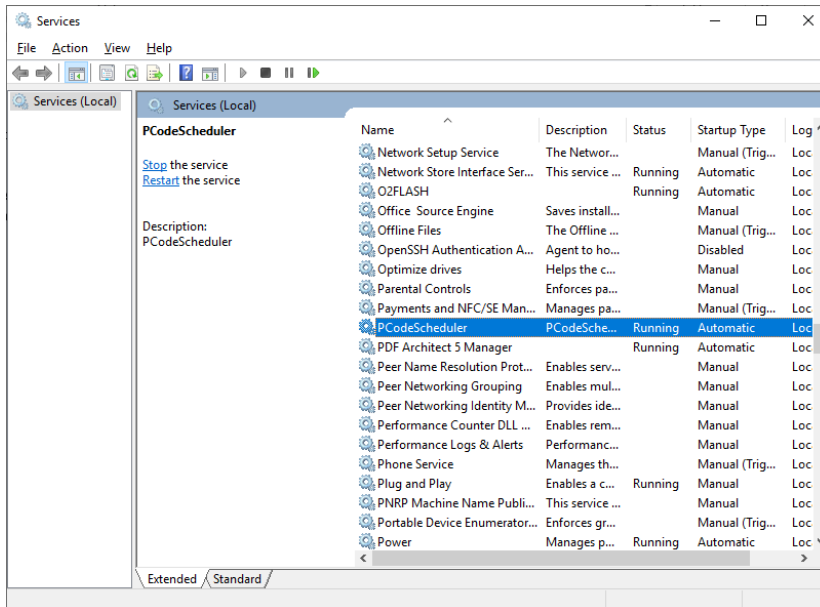
8. Close PrecisionCode if it is running.

9. On the Windows Start menu, click **Start** > **Run** or **Windows Key** + **R** then enter **mmc comexp.msc /32**.

10. Within the component services window, expand out **Console Root** > **Computers** > **DCOM Config**.
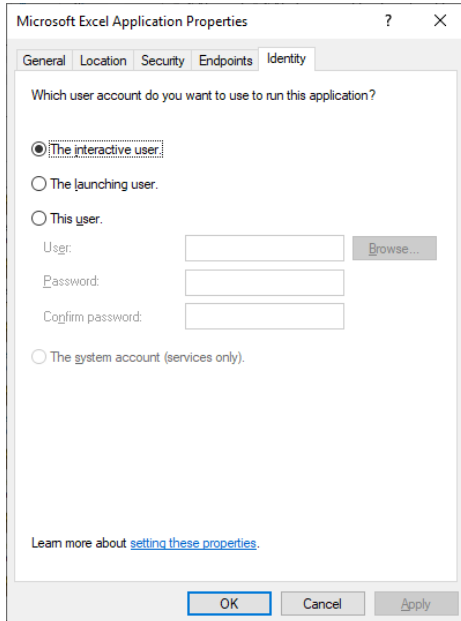

11. Locate Microsoft Excel Application in the list of components.

12. Right-click on the entry and select **Properties**.

13. Go to the **Identity** tab on the properties dialog.

14. Select the interactive user.
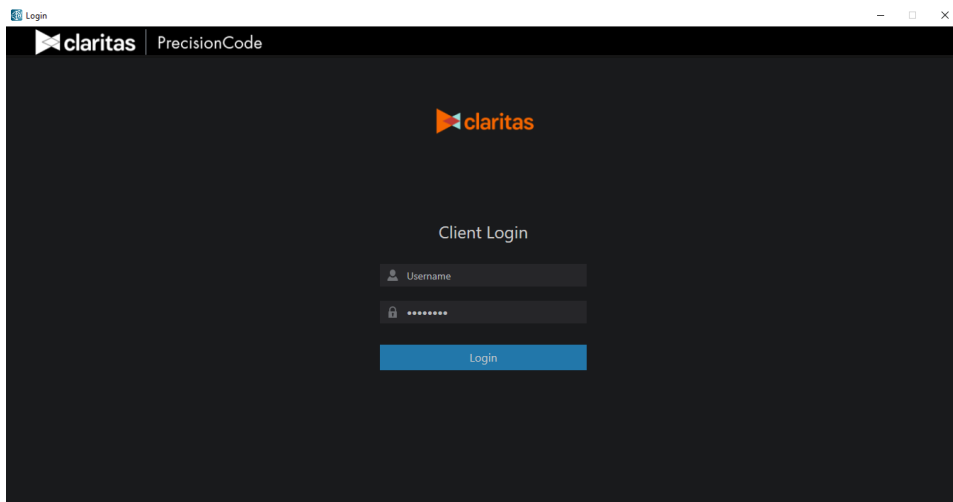

15. Click **OK**.

16. Close component services.

What's Next

You are now ready to use the application. Proceed to the next section, "Start Claritas PrecisionCode."

START CLARITAS PRECISIONCODE

1. On your desktop, double-click the **PrecisionCode** icon () on your desktop. The Client Login screen appears.

2. Type your username and password in the appropriate text boxes, and then click **Login**. The Claritas PrecisionCode main screen appears.
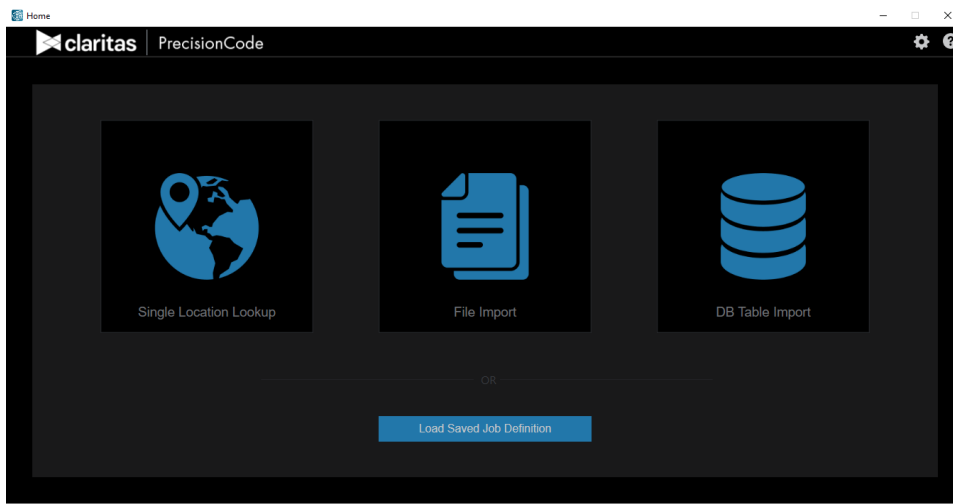
Note: If you have not received your username/password or cannot remember your password, contact the Claritas Solution Center between 9:00 a.m. and 8:00 p.m. (Monday through Friday, EST) at 800.866.6511.

Refer to the *Claritas PrecisionCode 6.7 User Guide* for more information on how to use the application. You can access the user guide via the Help menu on the main screen.

TECHNICAL SUPPORT

If you need further assistance, not provided in the installation document, please contact the Claritas Solution Center between 9:00 a.m. and 8:00 p.m. (Monday through Friday, EST) at 800.866.6511.

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