

Set-Up

Objective: Setting up client workstation to access CME Tracker with full functionality.

Requirements:

- Internet Explorer 6.x , 7.x , 8.x or 9.x
- Adobe Acrobat Reader
- Microsoft Word
- Microsoft Excel

Setup Reports:

Reports are delivered in one of 3 ways:

- Acrobat Reader
- Microsoft Excel Documents
- Microsoft Word Merge Documents

The following system changes are preferred for accessing both **Microsoft Word documents and Microsoft Excel Documents:**

Step 1:

- a. Click **Start** on your task bar.
- b. Click **Control Panel**.
- c. Click twice on **Folder Options**.
- d. Click the **File Types** tab.
- e. Click to highlight the **DOC** extension.
- f. Click the **Advanced Button**. (Fig. A)

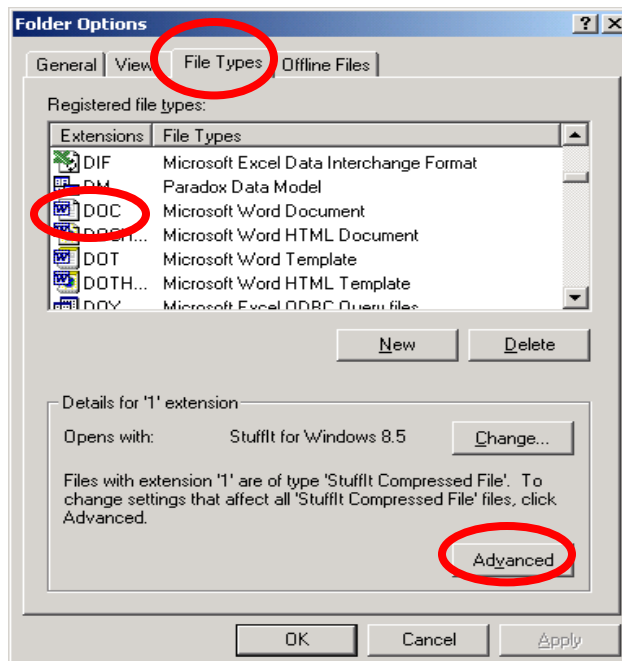


Fig. A

Set-Up

Step 2: The Edit File Type popup appears.

- a. Click to **UNCHECK** "Confirm open after download", "Always show extension" and "Browse in same window".
- b. Click **OK**.

(All boxes should remain unchecked) (Fig. B)

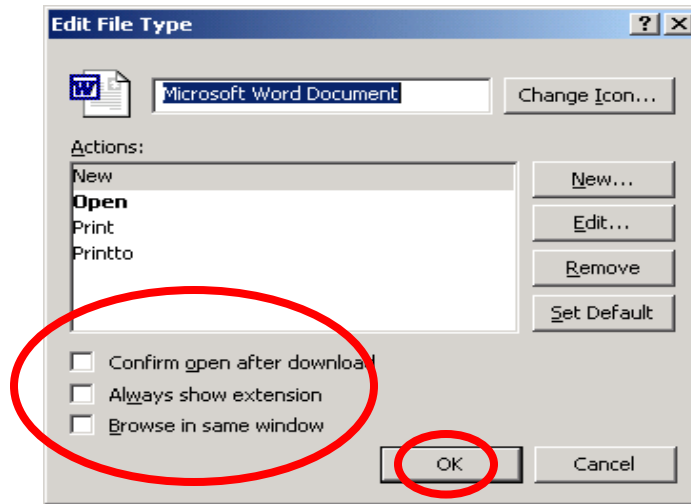


Fig. B

- Step 3:**
- a. Click to highlight the **XLS** extension.
 - b. Click the **Advanced** button. (Fig. C)

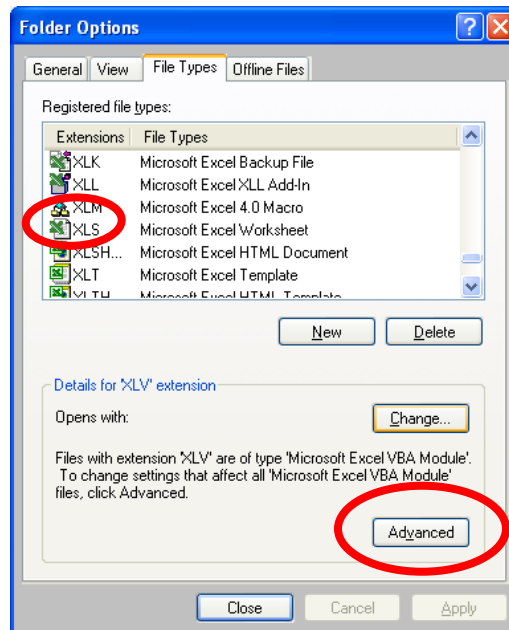


Fig. C

Set-Up

Step 4: The **Edit File Type** popup appears.

- a. Click to **UNCHECK** "Confirm open after download", "Always show extension" and "Browse in same window".
- b. Click **OK**.

(All boxes should remain unchecked) (Fig. D)

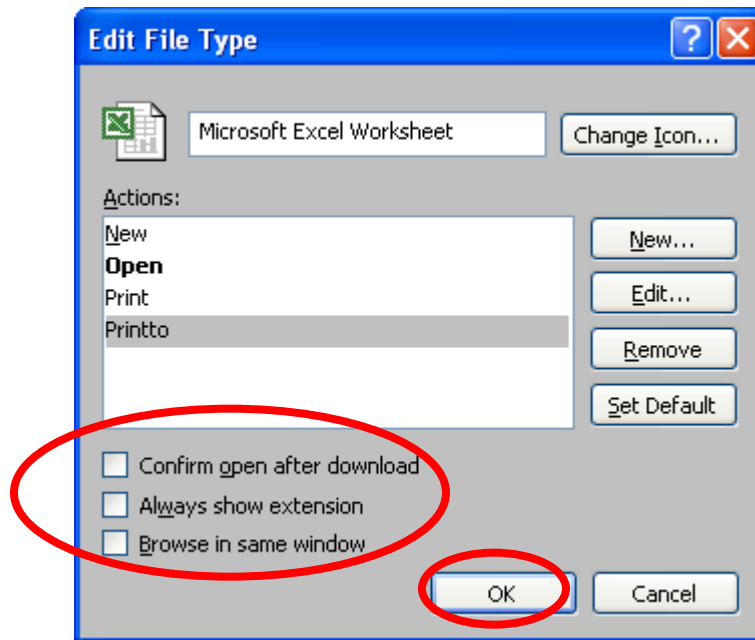


Fig. D

Step 5: Create a folder "My Documents" on the workstation in the root directory (c:\My Documents) for download of merge data source file.

Set-Up

Step 6: Having a Windows XP Firewall enabled will create slow performance. For best performance, it must be disabled.

- a. Click **Start** on your task bar.
- b. Click **Control panel**.
- c. Click twice on the **Windows Firewall Icon**. (Fig. E)

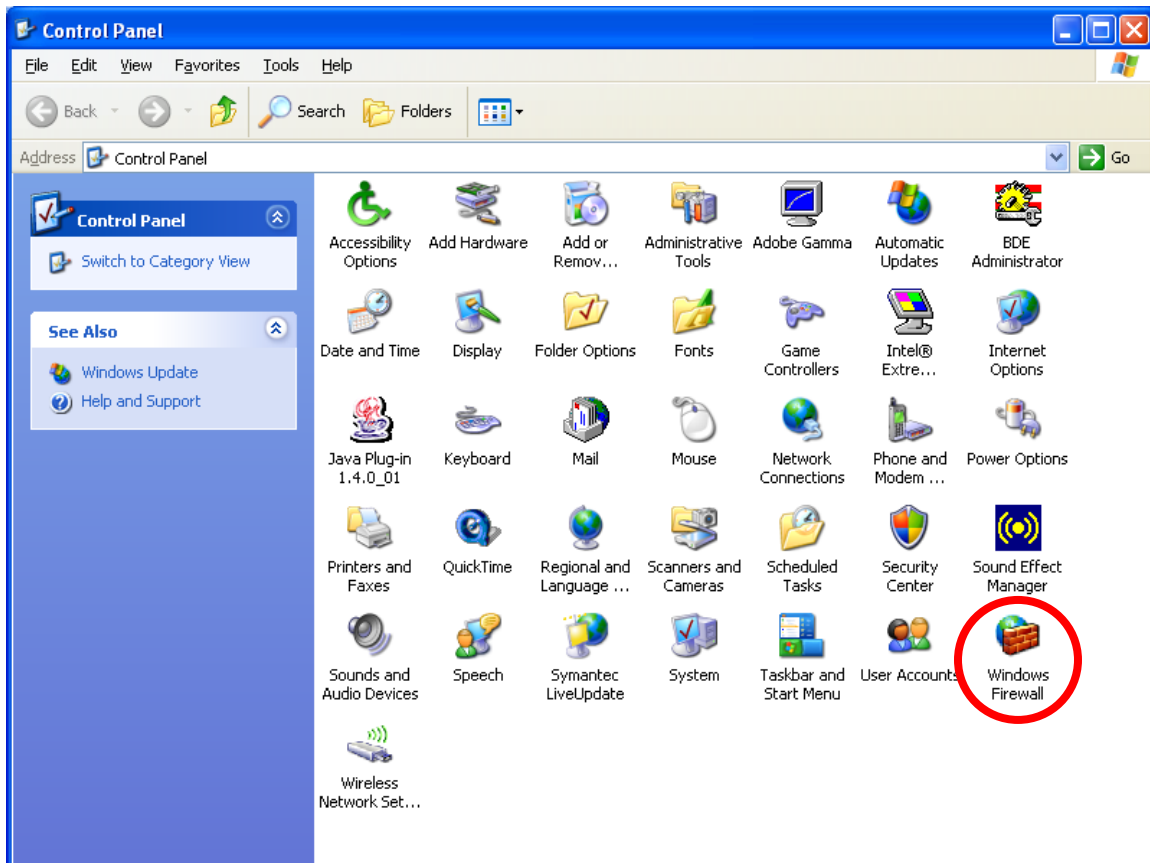


Fig. E

Set-Up

- Step 7:** The **Windows Firewall** opens.
- In the **General** tab,
 - Click the radio button next to **"Off"**.
 - Click **OK**. (Fig. F)

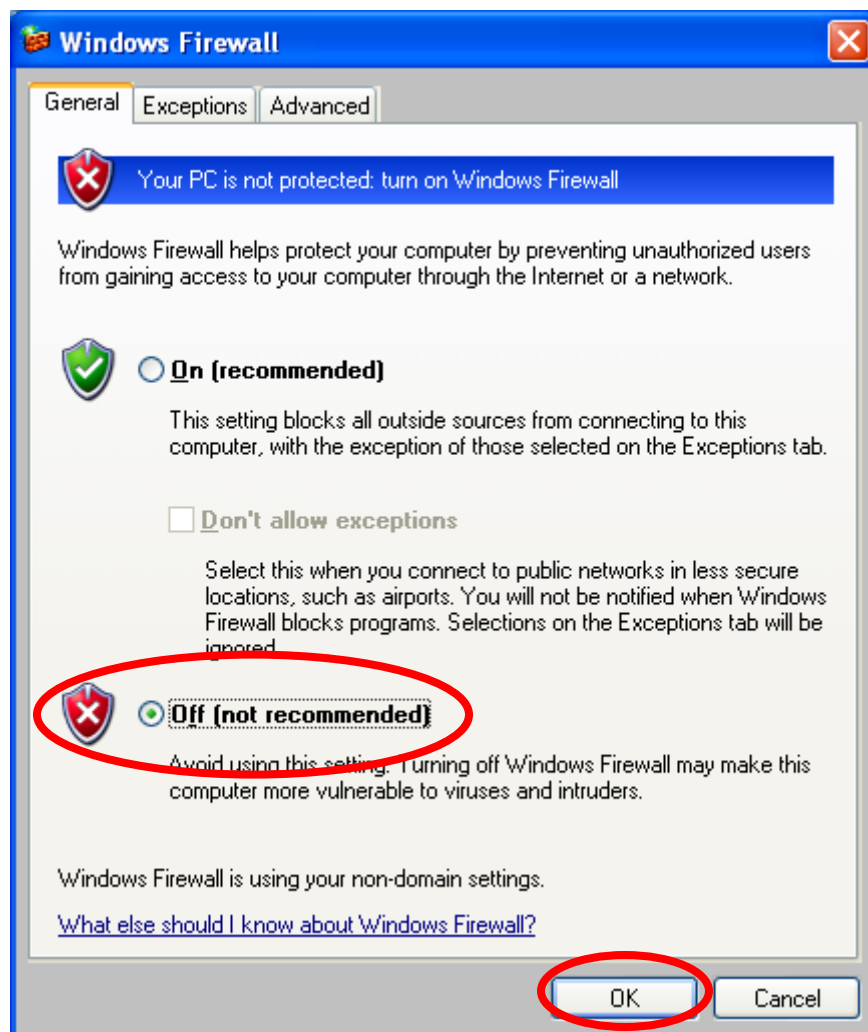


Fig. F

Set-Up

Step 8: Your Internet Explorer Version must be 6.x or 7.x, 8.x or 9.x To check your current version:

- a. Open your **Internet Explorer**.
- b. Click **Help**.
- c. Click "**About Internet Explorer**". (Fig. G)

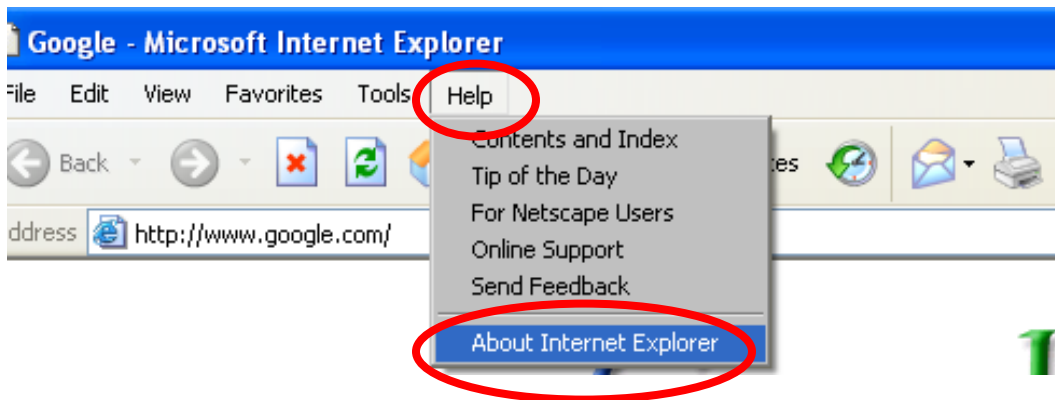


Fig. G

Step 9: The "About Internet Explorer" popup appears. Your current version is listed.

- a. Click "**X**" or "**OK**" to close. (Fig. H)

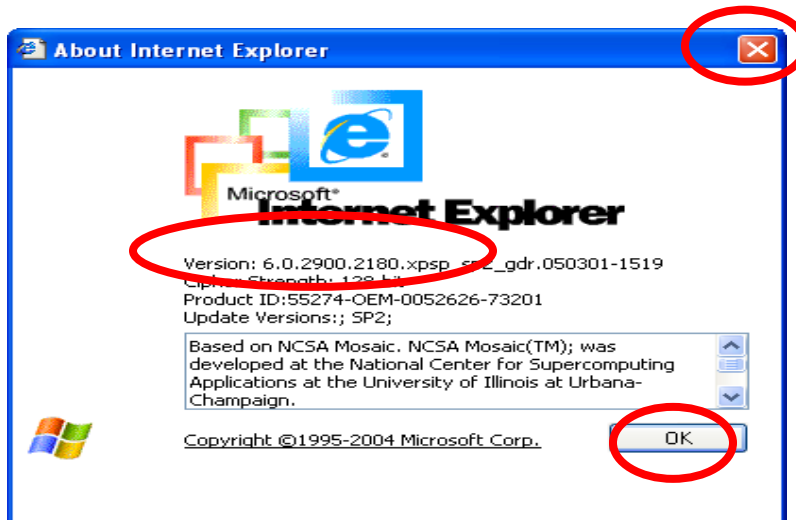


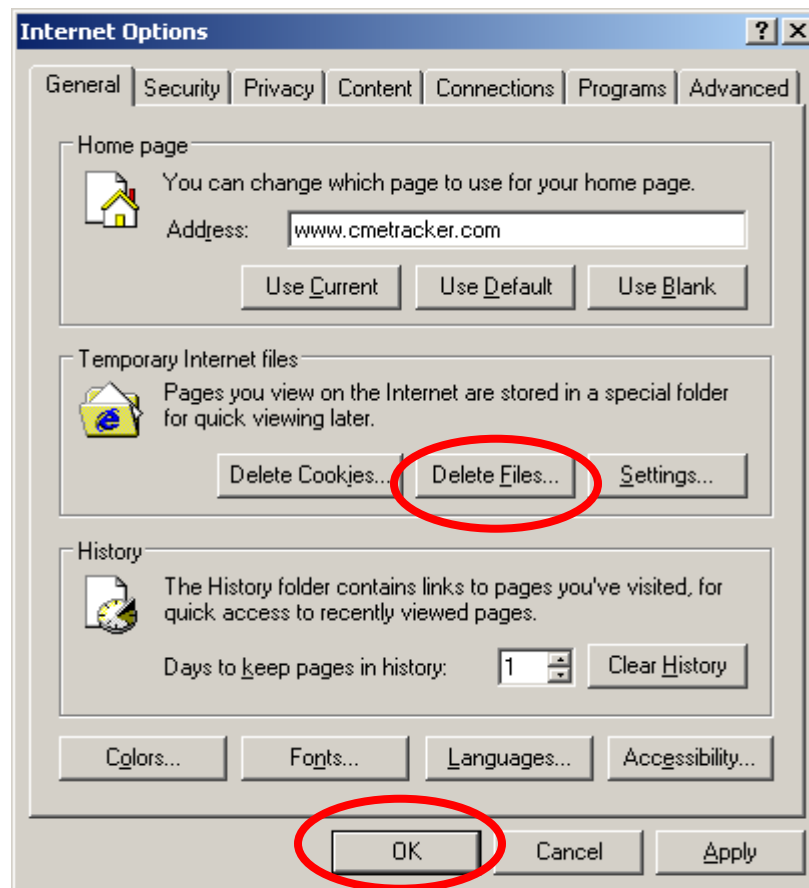
Fig. H

Set-Up

Note: Steps 10 – 25 all relate to **Internet Options**.

Step 10: Before getting started and as periodic maintenance, you will want to delete **"Temporary Internet files"**.

- a. Open your **Internet Explorer**.
- b. Click **Tools**.
- c. Click **Internet Options**.
- d. In the section **"Temporary Internet Files"**, Click **Delete Files**. (An hourglass appears while files are being deleted).
- e. Click **OK**. (Fig. I)



(Fig. I)

Step 11: In the address bar, of your Internet Explorer, enter the URL (address) **HTTP://cmetracker.net/DEMO/** or the URL (address) that was E-mailed to you from CME Tracker. Your browser will move to the CME Tracker Staff Edition web page.

Set-Up

Step 12: Internet Explorer is still open from previous step

- a. Click **Tools**.
- b. Click **Internet Options**.
- c. Click **Settings**. (Fig. J)

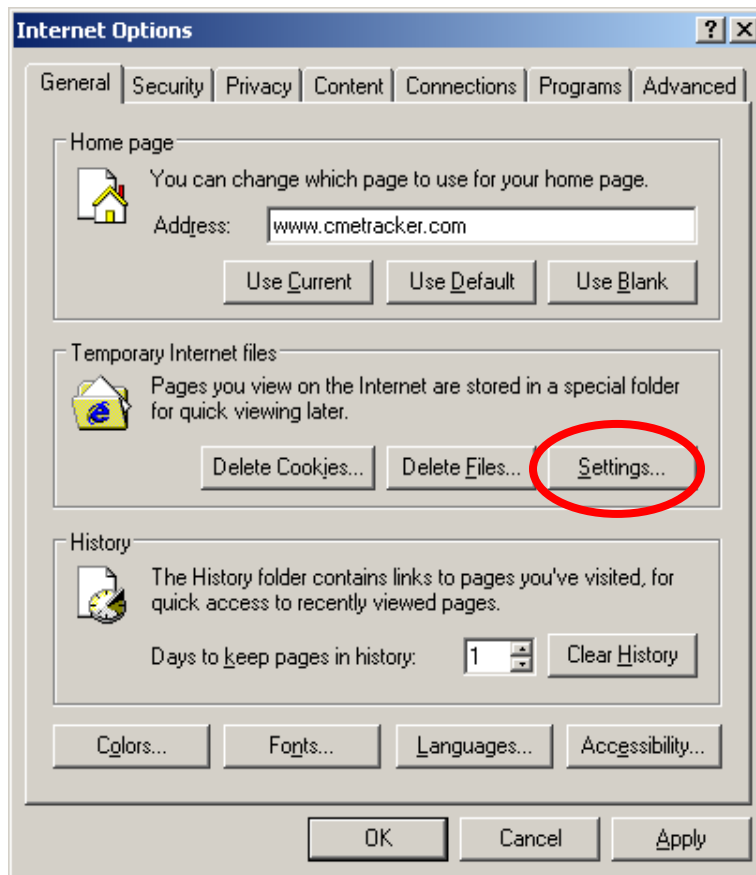


Fig. J

Set-Up

Step 13: The “Settings” popup appears.

- a. Click the radio button next to “**Automatically**”.
- b. Change the MB to 384 in the **Amount of disk space to use**.
- c. Click **OK**. (Fig. K)

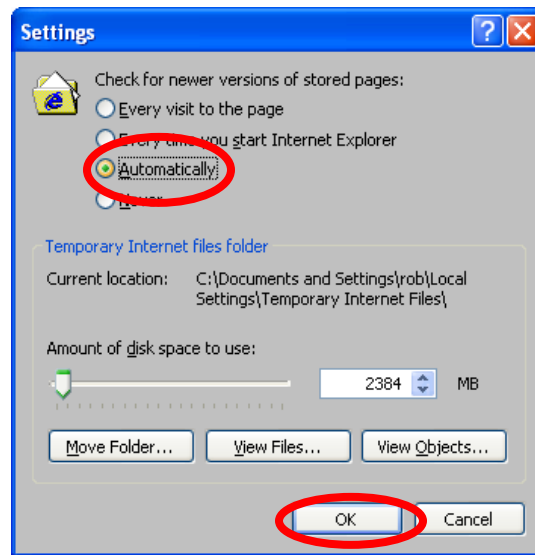


Fig. K

Step 14: Internet Options is now again on your screen

- a. Click **Advanced** tab. (Fig. L)

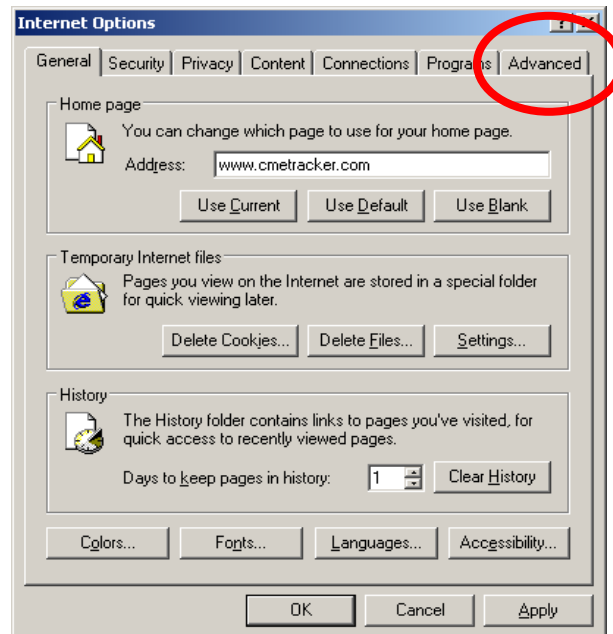


Fig. L

Set-Up

Step 15: In the **Advanced** tab,

- a. Click to check **"Empty Temporary Internet Files folder when browser is closed"**
- b. Click **OK**. (Fig. M)

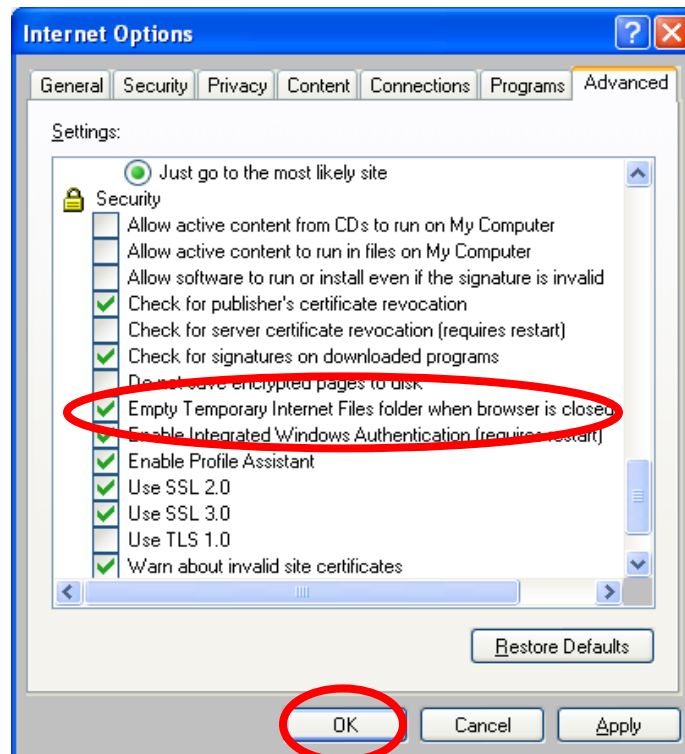


Fig. M

Set-Up

Step 16: Internet Explorer is still open

- a. Click **Tools**.
- b. Click **Internet Options**.
- c. Click **Security**. Check to be sure that your Level is set to Medium.
(Fig. N)

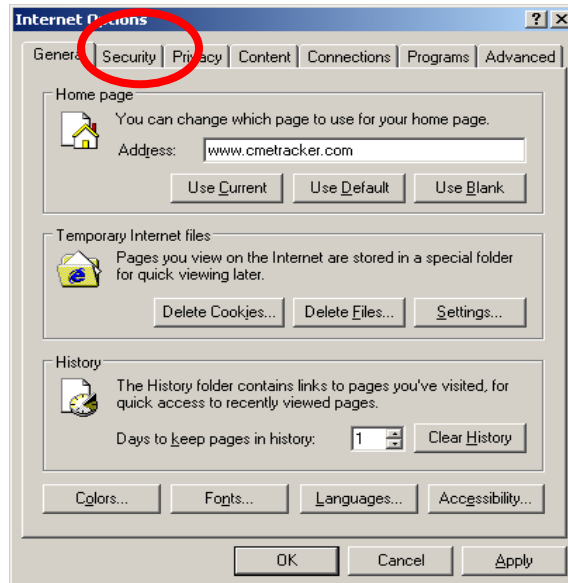


Fig. N

Step 17: Click **Custom Level** if you have that option. (Fig. O)

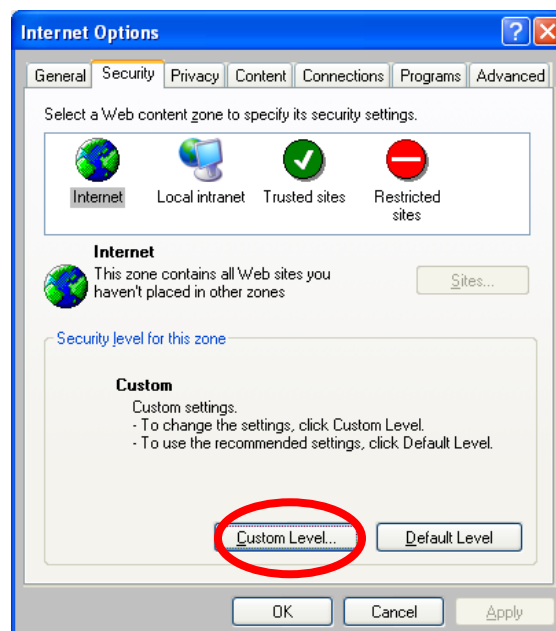


Fig. O

Set-Up

Step 16: From the dropdown, select **Medium**.
Click **Reset**. (Fig. P)

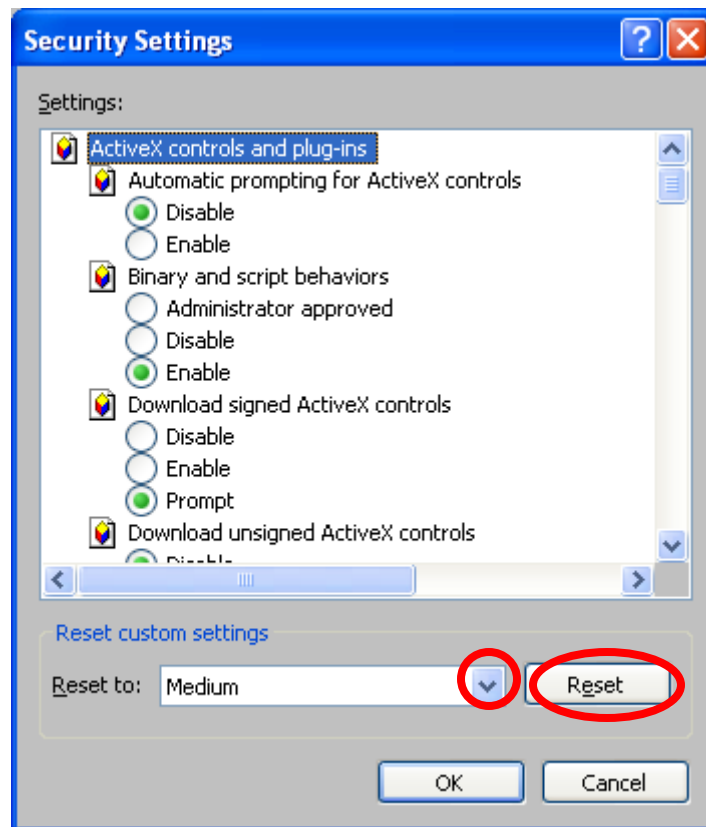


Fig. P

Step 19: A **"Warning!"** popup appears.
Click **Yes**. (Fig. Q)

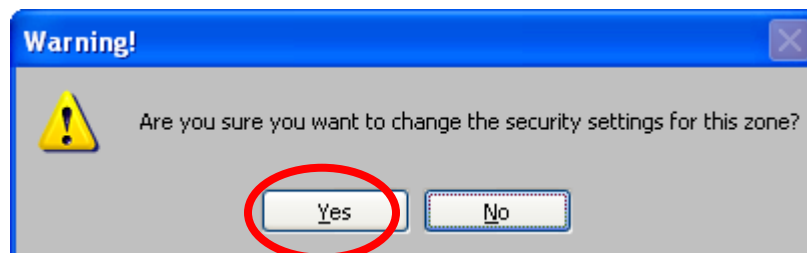


Fig. Q

Set-Up

- Step 20:** a. Click the **Security** tab.
b. Click **Custom Level**. (Fig. R)

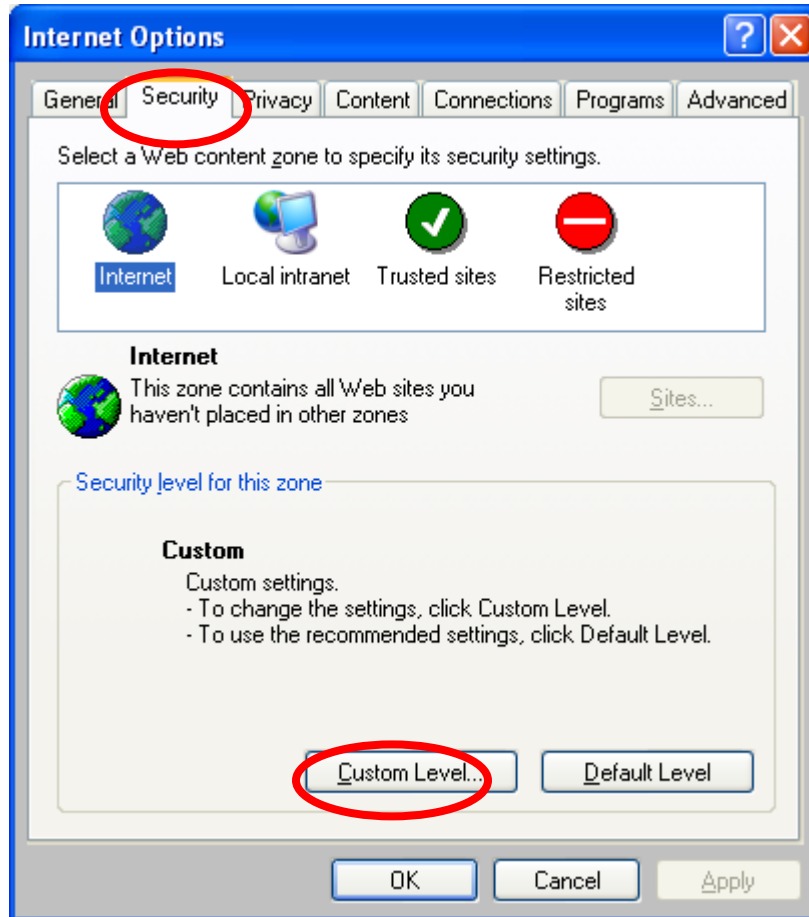


Fig. R

Set-Up

Step 21: A **Security Settings** popup appears

- a. Scroll down to find **Downloads**.
- b. Under "**Automatic prompting for file downloads**", click the radio button next to "**Enable**".
- c. Under **File download**, click the radio button next to "**Enable**".
- d. Click **OK**. (Fig. S)

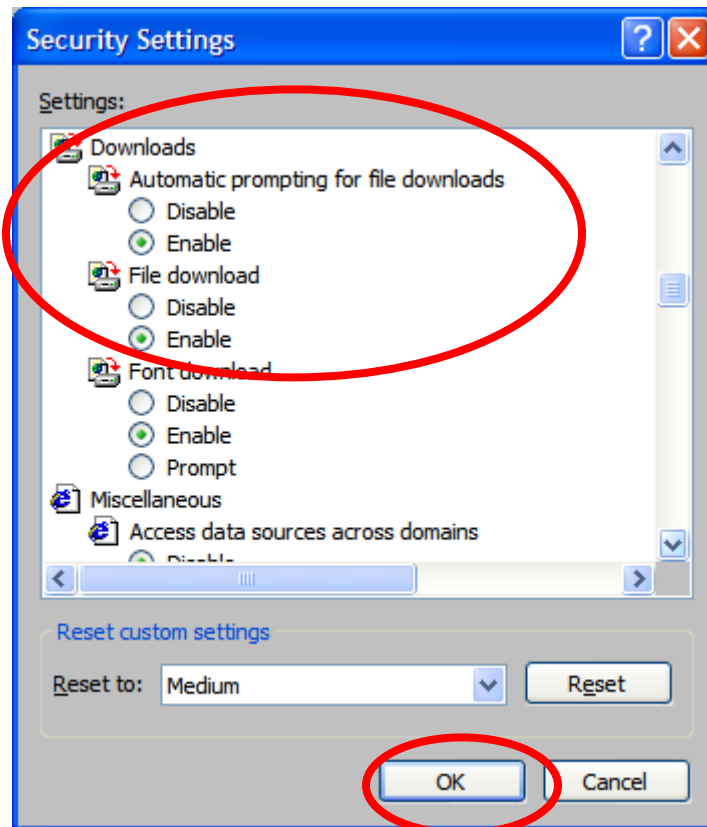


Fig. S

Set-Up

Step 22: Internet Options is on your screen

- Click **Advanced** tab
- Click to **UNCHECK** "Reuse windows for launching shortcuts".
- Click **OK**. (Fig. T)

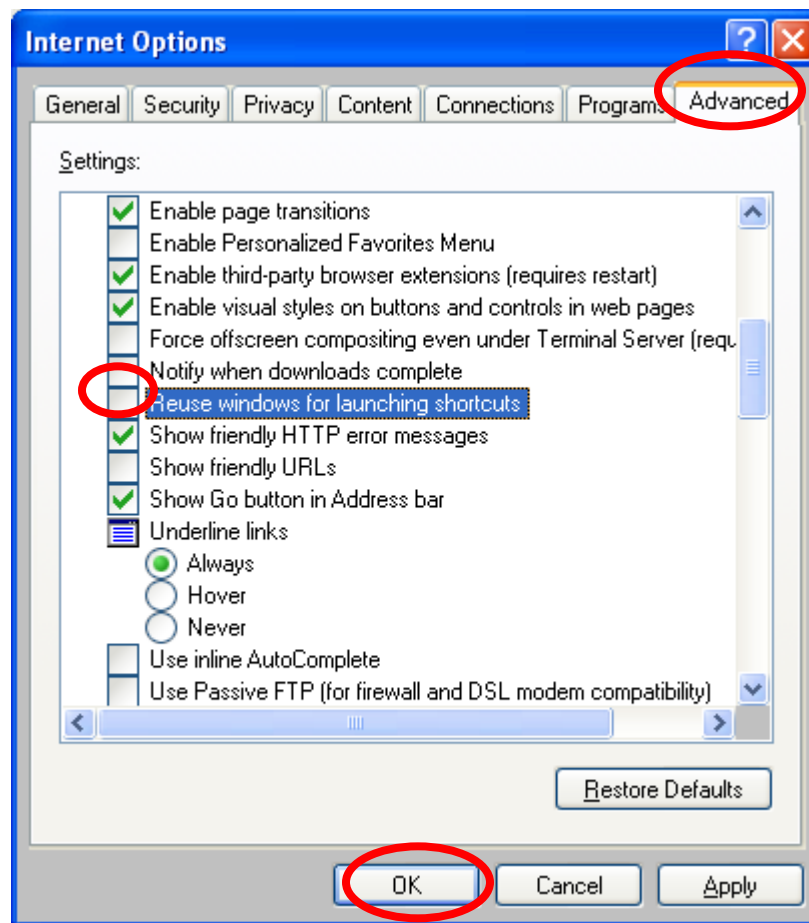


Fig. T

Set-Up

- Step 23:** You will now set up your **CME Web Tracker** desktop icon
- Open **CME Web Tracker Staff Edition** in your **Internet Explorer**
 - Click **Favorites**. (Fig. U)



Fig. U

- Step 24:**
- Click **Add to Favorites**. The **ADD Favorite** popup appears.
 - Click **OK**. (Fig. V)

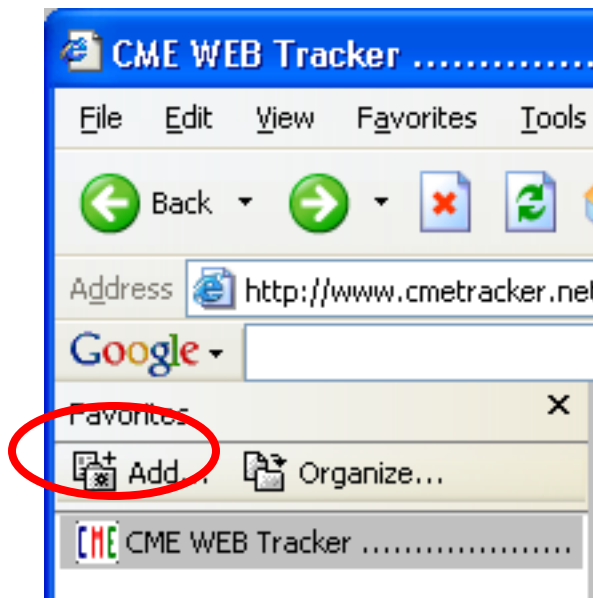


Fig. V

Set-Up

Step 25:

- a. Right Click on the **CME Web Tracker** page.
- b. Click **Create Shortcut**. (Fig. W)

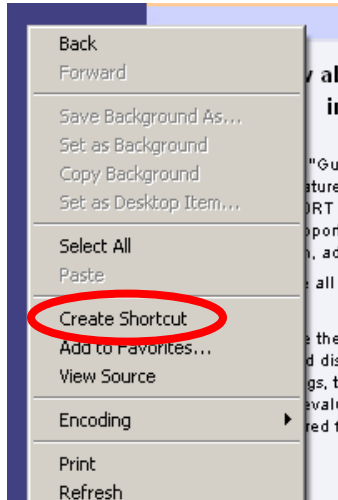


Fig. W

Step 26: The shortcut popup appears. Click **OK**. (Fig. X)

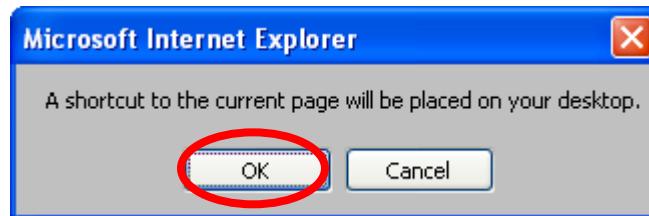


Fig. X

Result: The **CME Icon** with the description **CME Web Tracker** now appears on your Desktop. (Fig. Y)



Fig. Y

Set-Up

Step 27: For Word Merge Documents...to Disable SQL Security Warning:

<http://support.microsoft.com/default.aspx?scid=KB;EN-US;825765>

Step 28: For optimal performance, you will want to make your **CME WEB Tracker** a “**Trusted Site**”. See the **Web Tracker Tutorial: Configuring your CME WEB Tracker** as a Trusted Site.