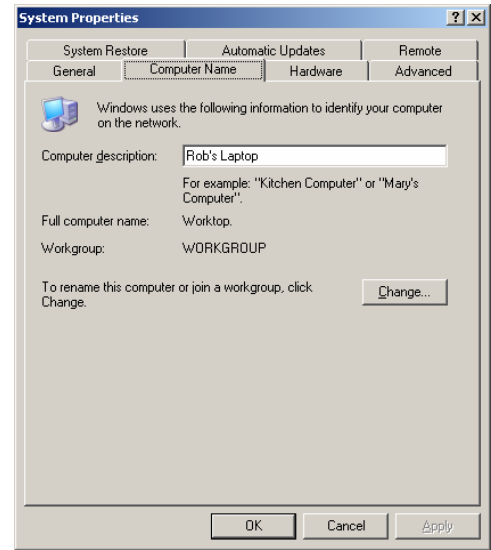


# Setting Up PerfectByte on a Network

## Step 1: Find the Name of the Server Computer

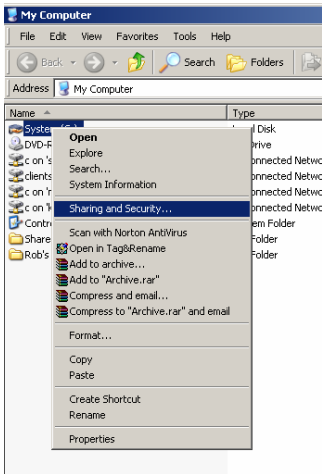
The first thing you need to do is have the client go to the computer that will be the server. This is the computer that will hold PerfectByte. Once they are there, Make sure they have windows XP for these directions. If they don't it will be a little different. So, providing they have Windows. XP, when they are looking at their desktop, have them **right click on My Computer**. If they do not have a My Computer icon on the desktop, click on the Start Menu, and then Right click On My Computer on the Start Menu. Now a menu will come up. **Select Properties**. Now, **Select the Computer Name Tab**. You will see a screen like this one on the right. Look where it says **Full Computer Name**. In the screenshot it is Worktop. This is the Name of the computer. You will need this in order to map a drive. Once you have this information, you can **click on Cancel** and the window will close.

The next step will be to make sure that the server drive is shared so we can access it on the network.



## Step 2: Share the Server Drive

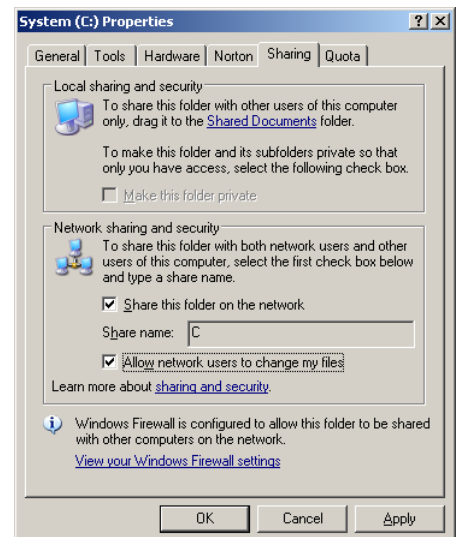
Theoretically, if a network person came in and set up the network, this step should not need to be done. However, sometimes it has not been done. So, to start, while still at the server computer, make sure all windows/programs are closed, and they are looking at the Desktop. **Double click on My Computer**, or if they don't have an icon on their desktop for My Computer, then go to the Start Menu and double click on My Computer. This will show the listing of drives that are on this computer. If you see a little hand holding the C: drive in My Computer, then it is already shared, but we don't know what name they shared it as so we will need to check anyways. **Right click on their C: Drive** (Some people may want the PerfectByte to reside on a separate drive on their server instead of the C drive. If that is the case, simply follow the same actions on the Data drive which would just be a different drive letter. But they should know this. Unless they specify, we share the C Drive and put the PerfectByte Program there.) You will see a menu similar to this one on the left. **Left Click on the Sharing and Security** option. You will now be taken to one of two possibilities.



### Possibility #1 - the Drive is already shared

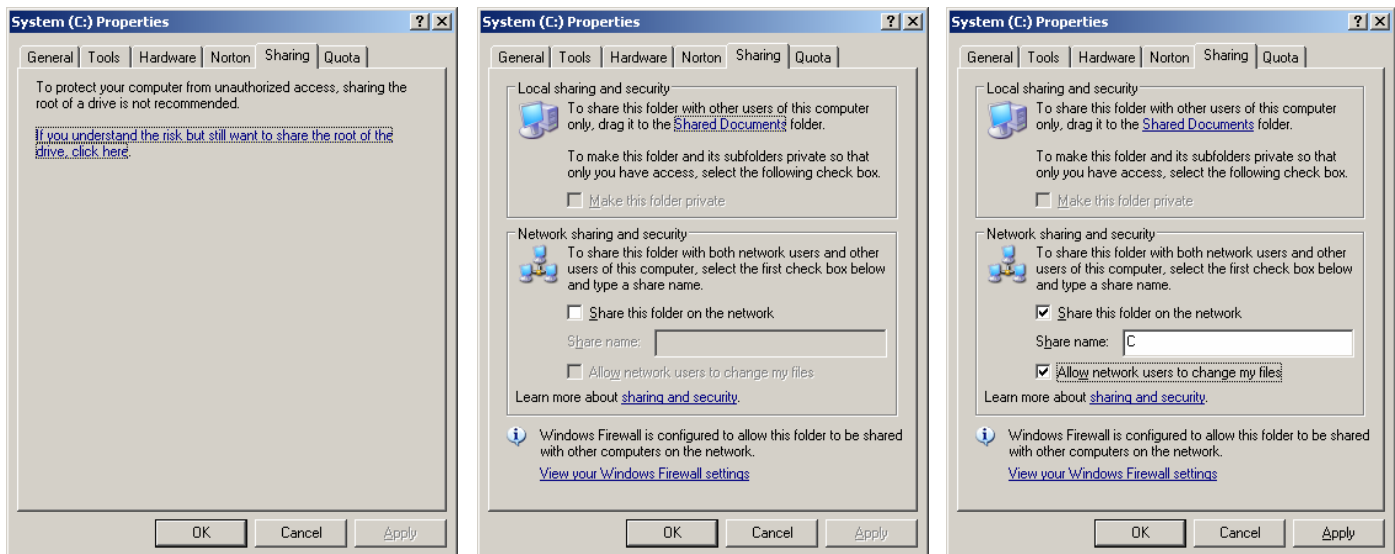
If the drive is already shared then the window will look like this one on the right. See in the section

where it says Network Sharing and Security, it has a check to Share this folder on the network, and it has a Share Name. **Write down the Share Name**. This is what we need to map the drive. Note also, that the **Allow network users to change my files must be checked**. Otherwise, you won't be able to make changes to PerfectByte from Workstations. In this example our ShareName is C. It could be something else, but if they don't care, we like to Use C (or if we were sharing a D Drive we would use D) because it accurately represents the drive letter we are sharing. **If the allow network users to change my files flag is not checked, check it and click on Apply**. At this point sharing should be complete and you can go on to Step 3.



## Possibility #2 - Drive Is Not Shared...

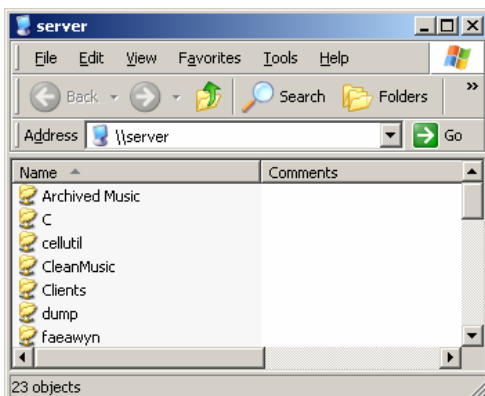
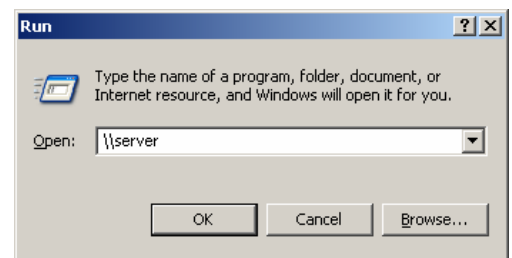
If the drive is not shared you will see a window that looks like this. **Click on the Blue text that says *If you understand the risk but still want to share the root of the drive, click here.*** It will then display the options you



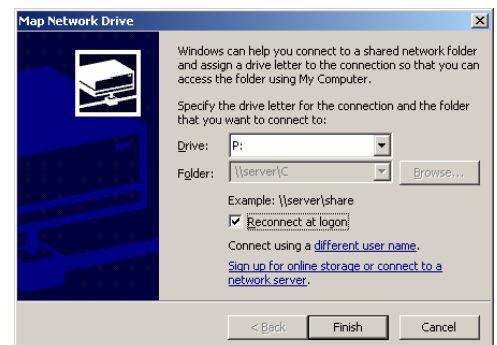
see in the middle print screen. Click the **Check box that says Share this folder on the network.** That will enable a box that says share name, as you see on the right print screen. **Place a C in the share name box** (or D if you are using the D drive for example) and **make sure to check the Allow network users to change my files.** Again, they could use a different share name if they wanted to, but for simplicity, we like the drive letter as the share name. Now **Click on Apply.** You have just successfully shared a Drive! Some people do what is called Mapping to a Folder. We will show you how to do that in a different section, and its purpose.

## Step 3: Map the workstation drives

Once you have your server name and share name, you should be able to access this computer from any workstation on the network, provided the network is set up properly in the first place. To Start, go to the first workstation. Once there, close all windows, so they are looking at the desktop. The easiest way to get access to the server is to click on the Start Menu, and then click Run. You will see a window that looks like this. For our example, let's say our computer name of the Server is actually "Server". **Type in \\ServerComputerName and press OK.** Obviously replace "ServerComputerName" with the actual name of the server computer that you retrieved in Step 1. Once you click on OK, it will take you to a window where you will see available shares for that computer (like



the one to the left). **If you get an error message here, that says Network path not found, you either typed the server name incorrectly, or their network is not set up properly. They will need to call in a hardware person.** We cannot help them any further. In this example, there are a bunch of shares on this server, which is why you wrote down the share name in step 2. look for the Share name that you wrote down, and right click on it. You will see some options. Left click on Map Network Drive option. It will look similar to the screen shot on the right.



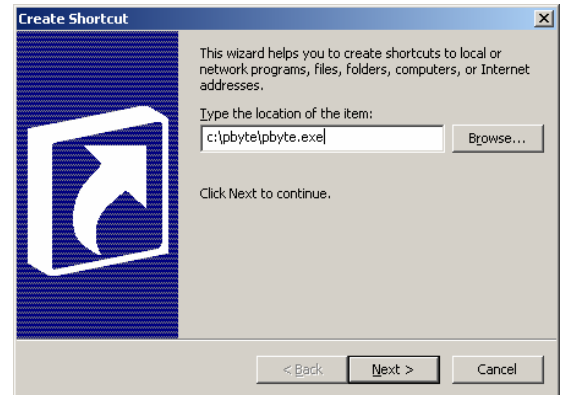
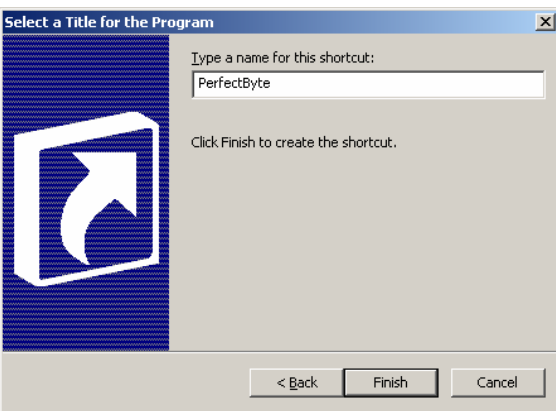
Once you click on the map network drive, you will see a window similar to the screen shot on the right. **Click the drop down box for the Drive, and select a letter that isn't used**, P is good because it stands for PerfectByte. Then make sure to **check the option to Reconnect at Logon**. If you don't, when you restart it will be gone. Now this drive letter will show up in the My Computer area on this workstation. **Now just create your shortcuts**. See Step 4 for Making Shortcuts.

## Step 4: Making the shortcuts

You shortcuts will be different on the server, than on the workstations. Generally if it's a new installation, you would install PerfectByte on the server, and therefore there would already be shortcuts. However, as many clients do, they will install the program on a laptop or another computer and play with it and then want to copy it to the server. For help on copying the data from another computer see that section.

### Making shortcuts on the Server:

For our example, we had PerfectByte on the Server Computer on the C Drive. So to make shortcuts on the Server; close all windows/applications, so the user is looking at the desktop on the server. Right click on the Desktop; this will bring up a menu. Left Click on New, and then the option for Shortcut. A Window will come up where you can put in the path of the PerfectByte Exe. It will look like this (although I typed in the path so you could see what it looked like – it will be blank when you do it). **In the box type in C:\PBYTE\PBYTE.EXE and choose Next**. If they installed PerfectByte on a different drive letter like D, then it would be



D:\PBYTE\PBYTE.EXE. Once you click on Next, it will ask for the name of a shortcut. It will look like this (left). It will probably say pbyte.exe, but change to be more descriptive, like PerfectByte, or PerfectByte Practice Management Software. Once you are done, click finish. Now we need to do the same thing for the Scheduler. Follow the same steps, except use c:\pbyte\psched.exe instead of c:\pbyte\pbyte.exe. Then Name it PerfectByte Scheduler. Once you are done, click finish. Now we need to do the same thing for the Time Clock. Follow the same steps, except use c:\pbyte\pclock.exe. Then, name it PerfectByte Time Clock.

### Making shortcuts on the Workstations:

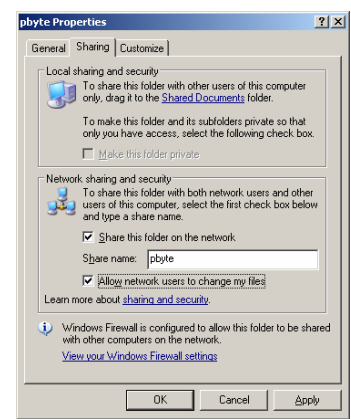
Close all windows/applications, so the user is looking at the desktop on the workstation. Right click on the Desktop; this will bring up a menu. Left Click on New, and then the option for Shortcut. A Window will come up where you can put in the path of the PerfectByte Exe. **In the box type in P:\PBYTE\PBYTE.EXE and choose Next**. We are assuming that P is the drive letter that you mapped from step 3. If it is different, like R for example, you would type R:\PBYTE\PBYTE.EXE and press Next. Now, type in a Name, Like PerfectByte and press Finish.

Follow the same steps, but when use P:\pbyte\psched.exe instead.

Follow the same steps, but when use P:\pbyte\pclock.exe instead.

## Extras: When people map to a Folder.

Sometimes network people come in and they do not want to share the root drive (also known as the C Drive). So they will just share a folder. While it is true that if you map the root drive (C Drive) on a server, a workstation can access all folders on that server, generally this is not an issue. However, sometimes ppl only want to map to a folder. So I will show you how to do that. On the server, start by double clicking on My Computer. You may have to open it from the Start Menu. Once there, double click on the C Drive. You will see a bunch of folders. Scroll through till you find the pbyte folder (assuming



they installed it on the server already). Right click on the Pbyte Folder and choose Sharing and Security from the Menu that popped up. You will see a window that looks like this (right). Check the box that says Share this folder on the network, and then give it a share name. pbyte will generally default, but it can be anything. Make sure you check Allow network users to change my files. Click on Apply and then Click on OK If the window does not disappear. Now, when you go to a workstation and go to the Start Menu and click on Run, and type in [\\server](#) and press Ok, You will see the folder that you shared. And there you can right click on it and choose to map the network drive like in step 3. Here is the difference. Let's say you used P as your letter that you mapped

If you mapped to the Root drive the Letter P is equal to the c:\ so our shortcut would be p:\pbyte\pbyte.exe

If you mapped to a Folder the Letter P is equal to the [\\server\sharename](#) when you mapped the drive letter to the folder.

So your Shortcut would be P:\pbyte.exe

By mapping to a folder, P directly represents the pbyte folder on the server, instead of the P representing the Server Drive letter which would generally be C:

This is probably confusing. This is why we try to avoid mapping to folders.

## **Extras: Copying the data from another machine onto the server.**

Let's take an example. Trial user is using PerfectByte on his laptop at home. He/She decides they like it so they buy. Now they want to take their data from their laptop and put it on their server. Here are some options:

### **Option1: USB Key Drive or External Hard Drive**

#### **Copying the data to the USB Key Drive or External Hard Drive**

If they have a USB Key drive or external hard drive, go into My computer, double click on the C Drive, and then scroll till you find the Pbyte Folder. Right click on it, and choose Copy. Now close the window. Go back into My Computer. Have them plug the USB Key Drive in if it's not already and it should show up as a drive letter in the My computer Area. It will say something similar to "Removable Disk (F:)" or similar. Double click on the drive letter for the USB Drive or External Hard Drive, and it will open a window that may have files or folders in it, unless it is empty. Go to the menu at the top and Click on Edit, and then choose Paste. This will take a copy of the Pbyte folder and place it on the USB Drive. Once it is finished copying, take the USB Drive, or external Hard Drive to the server and plug it in.

#### **Putting the data on to the server**

After connecting the USB Drive or external Hard drive on the server, double click on My Computer, and you should see the USB Drive in there. Double click on the USB Drive, and scroll through till you find the pbyte folder that you had copied. Once you find it, right click on it, and choose Copy. Then close the Window. Go back to my computer and double click on the C Drive. From the Menu at the top, choose paste. It will then put the pbyte folder and its content onto the server.

#### **Delete the Old Data**

Once you know the data has copied ok. You will need to go back to the Computer that previously had the data, and delete it. To Do this, to back to the laptop or workstation that had the data, and go into my computer, and then double click on the C Drive. Then scroll till you find the pbyte folder. Drag it to the recycle bin. You can also right click on it and Choose Delete. Deleting the data is important, because if they ever have network issues, and this computer were disconnected from the network, windows will attempt to find a pbyte.exe, and it will find a local old copy where they would start adding data and there would be problems.

### **Option2: Burn the Data to a CD-R or DVD-R**

Due to the fact that there are so many different types of cd burning utilities, we cannot tell them how to burn the data to a CD. But if they know how, then just tell them to take the entire Pbyte Folder on the computer that currently has PerfectByte. Once they have burned the CD, have them take the cd to the Server computer.

#### **Putting the data on to the server**

Insert the CD in the Drive, and go to My computer. Double click on the CD Drive and a window should open up. You should see the Pbyte folder. Right click on it and choose Copy. Then close the window. Double click on the My Computer, and then the Server C Drive. You will see a list of files and folders. At the menu at the top choose Edit and then Paste. This will copy the data to the server C Drive.

### **Delete the Old Data**

Once you know the data has copied ok. You will need to go back to the Computer that previously had the data, and delete it. To Do this, to back to the laptop or workstation that had the data, and go into my computer, and then double click on the C Drive. Then scroll till you find the pbyte folder. Drag it to the recycle bin. You can also right click on it and Choose Delete. Deleting the data is important, because if they ever have network issues, and this computer were disconnected from the network, windows will attempt to find a pbyte.exe, and it will find a local old copy where they would start adding data and there would be problems.

### **Option3: Copying the Data over the Network**

This feature will only work if you map to the root. Which means you must first follow steps 1 – 3 and set up the network correctly. Once you have done this, and the laptop or computer that has PerfectByte is also on the network (treat it like a workstation). Double click on My Computer. Now double click on the C Drive, and scroll through the folders till you see the Pbyte Folder. Right click on the Pbyte folder and choose Copy from the Menu. Close the Window. Then click on Start, and then Run, and then type in [\\server](#) and press Ok. (Server is our example name. they may have named their server computer something else. You should have written this down from step 1).

This will bring up a window with a folder or multiple folders in it. Double click on the Share name that you wrote down from Step 2. In our Example it was C. Now from the menu at the top choose Edit and then Paste. This should copy the data from the workstation or laptop to the Server. After it is done, to be sure, have them go to the server, and make sure it is there. If you go to my computer on the server, and double click on the C Drive, you should see the pbyte folder. You can make the shortcuts while you are here as well(step4).

### **Delete the Old Data**

Once you know the data has copied ok. You will need to go back to the Computer that previously had the data, and delete it. To Do this, go back to the laptop or workstation that had the data, and go into my computer, and then double click on the C Drive. Then scroll till you find the pbyte folder. Drag it to the recycle bin. You can also right click on it and Choose Delete. Deleting the data is important, because if they ever have network issues, and this computer were disconnected from the network, windows will attempt to find a pbyte.exe, and it will find a local old copy where they would start adding data and there would be problems.

Note! After this is done. Delete all the old icons, and make new ones using Step 4. Otherwise their icons will be pointing to the old data that you dragged to the recycle bin. You may also have to do step 3 for this computer to set it up on the network if you haven't already.