
CHEPMATE® V4 UPGRADE GUIDE

1 CUSTOMER INTRODUCTION

1.1 INSTALLATION REQUIREMENTS

To install CHEPMate v4 you will require the following from CHEP:

- Access the system support site at <http://au.chepsupport.com/>. Download the Server and Client components from the Software TAB.
- Call CHEP (13 24 37) for the following:
 - Installation/Set-up Import File.
 - The CHEPMate daily password.
 - Unique docket prefix & suffix.

1.2 DISCLAIMER

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1.3 OVERVIEW

CHEPMate consists of two components which require installation, Server and Client. Both components need to be available for this software to function. While only one instance of the server component can exist, multiple client components can be installed pointing to the server. This software has also been adapted for use in Terminal services and CITRIX environments.

CHEPMate utilises SQL Server 2005 Express. SQL Server 2005 Express does not support the Banyan VINES Sequenced Packet protocol (SPP), Multiprotocol, AppleTalk, or NWLink IPX/SPX network protocols. Clients previously connecting with these protocols must select a different protocol to connect to SQL Server 2005 Express.

1.4 PRODUCT SUPPORT

If you have questions about using CHEPMate, contact the CHEP Helpdesk: Phone 132437 or Email: chephelpdesk@chep.com.

1.5 FURTHER TRAINING

CHEPMate training is available on request:

- **Level 1** – Online or onsite training by a CHEP representative
- **Level 2** – Offsite training is available and highly recommended. This is run by CHEP.

1.6 CHEPMATE® SERVER REQUIREMENTS

Actual requirements may vary based on your system configuration and the applications and features you have installed and running.

Please note: These are Minimum Requirements. Many installs may require additional available hard-disk space and RAM.

1.6.1 HARDWARE REQUIREMENTS

The following is the minimum requirements for the use of CHEPMate Server:

- Pentium III compatible (or higher)
- 1.0 GHz processor (or higher)
- 512 MB RAM
- 2 GB Free Hard Disk Drive space

1.6.2 SOFTWARE REQUIREMENTS

CHEPMate Server can run on the following Operating Systems:

- Windows Server 2003 Standard Edition SP1
- Windows 2000 SP4
- Windows XP SP2
- Windows Vista (32 or 64 bit)
- Windows 7 (32 or 64 bit)
- Windows Server 2008 (32 or 64 bit)
- MS Internet Explorer 6.0 SP1 or later
- MAPI compliant Email System for auto email functionality.

- NT Server 4.0 Enterprise Edition, with SP5 or later
- NT Workstation 4.0 with SP5 or later
- NT® Server 4.0 with SP5 or later
- Windows 95 & 98

These operating systems ARE NOT compatible.

As part of the CHEPMate Server Install, the following extra components are installed automatically, and cannot be customised.

- Microsoft SQL Server 2005 Express
- Microsoft SQL Server Native Client
- Microsoft SQL Server Setup Support Files (English)
- Microsoft SQL Server VSS Writer

For more information, go to <http://www.microsoft.com/sql>

Further notes about CHEPMate Server:

- **If you are NOT installing the CHEPMate Server on a dedicated file server, please be aware of the following:**
 - The machine 'acting' as the Server must always be turned on.
 - If there are any issues with the machine which is the 'acting' Server, no-one will be able to get access to the CHEPMate system.
 - The machine 'acting' as the Server may have an increased traffic load if multiple clients simultaneously access the database.
 - A backup routine must be devised to ensure the backup folder and its contents are copied from the 'acting' Server to an actual Server to enable successful backups in the case of a hard drive crash.

- To successfully install the server component it is necessary to ensure that the **"File and Printer Sharing for Microsoft Networks"** component is installed on the machine prior to installation.

- Once installed, the CHEP directory (Default: C:\Program Files\CHEP), will need to be shared as CHEP, and all CHEPMate users will require write access to the **Share Permissions**.

(Note: the directory pathway may be on a drive specific to your requirements – for example D:\CHEP).

- **Directory Permissions** will also need to be set to the above directory, so the all users who use CHEPMate have write access to it, and all sub folders below.

- A daily backup routine will need to be setup for the "Back up" folder in order to backup the data from the system The default location of the backup folder is::

Example: C:\Program Files\CHEP\CMSNET\SQL\DATA\MSSQL.1\MSSQL\DATA\BACKUP

1.7 CHEPMATE® CLIENT REQUIREMENTS

Actual requirements may vary based on your system configuration and the applications and features you have installed. Additional available hard-disk space may be required.

1.7.1 HARDWARE REQUIREMENTS

The following is the minimum requirements for the use of CHEPMate Client:

- Pentium III compatible (or higher)
- 1.0 GHz processor (or higher)
- 512 MB RAM
- 1 GB Free Hard Disk Drive space
- Minimum 800 x 600 minimum monitor resolution

1.7.2 SOFTWARE REQUIREMENTS

CHEPMate Client can run on the following Operating Systems:

- Windows Server 2003 Standard Edition SP1
- Windows Server 2008 (32 or 64 bit)
- Windows 2000 SP4
- Windows XP SP2
- Windows Vista (32 or 64 bit)
- Windows 7 (32 or 64 bit)
- MS Internet Explorer 6.0 SP1 or later
- MAPI compliant Email System for auto email functionality.

- | | |
|---|--|
| <ul style="list-style-type: none">• NT Server 4.0 Enterprise Edition, with SP5 or later• NT Workstation 4.0 with SP5 or later• NT® Server 4.0 with SP5 or later• Windows 95 & 98 | These operating systems ARE NOT compatible. |
|---|--|

As part of the CHEPMate Client Install, the following extra components are installed automatically where required, and cannot be customised.

[.Net Framework 2.0](#)

2 CHEPMATE CONFIGURATION

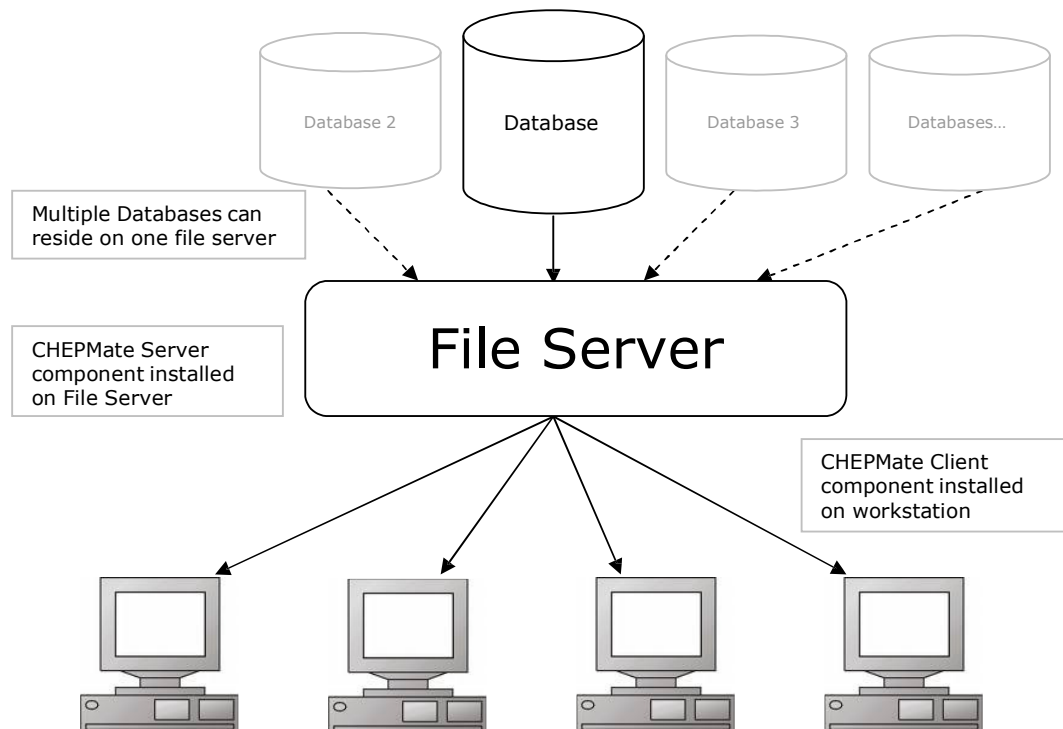
1. Standalone Configuration



CHEPMate Server and Client component installed on a workstation

2. File Server Configuration

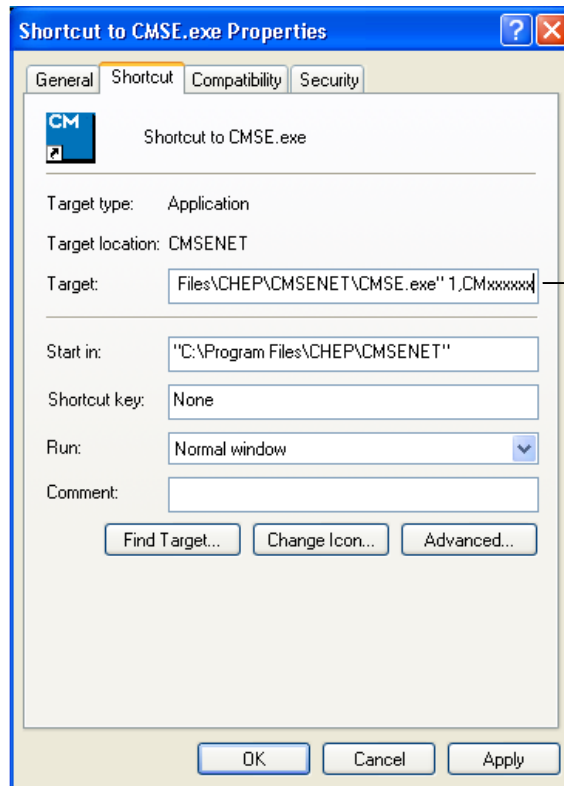
- CHEPMate Server component is installed on a File Server
- CHEPMate Client component is installed on a workstation.
- Multiple Databases can reside on one File Server



- All workstations, with CHEPMate Client installed, pointing to the file server will have access to the Database(s) on the File Server.

Multiple Icons for Multiple Databases:

- To have multiple icons of CHEPMate client pointing to an individual database, follow this process:
 1. Create a shortcut of CMSE.exe from C:\Program Files\CHEP\CMSNET (**The shortcut should be created from this path only**)
 2. Go to the properties of CMSE.exe and amend the Target field as shown in the picture below.



Initial Target:-
"C:\Program Files\CHEP\CMSNET\CMSE.exe"

Change Target to:-
"C:\Program Files\CHEP\CMSNET\CMSE.exe" 1, CMXXXXXX

After quotation mark:

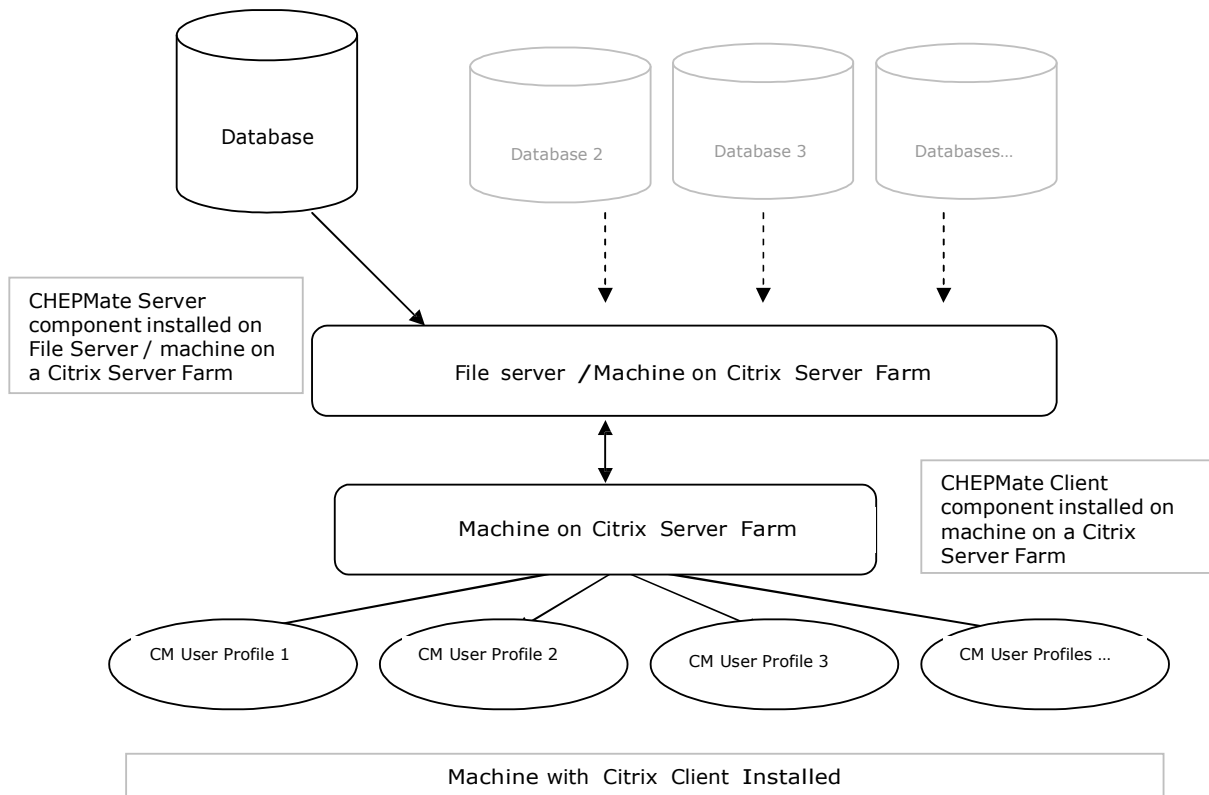
1. Hit the Space bar once
2. Number the database(Numbering should be discrete for each database)
3. ','
4. Database name (i.e. CMXXXXXX)
5. Hit apply

This process will allow this icon to access only the specified database.

- This process creates a separate icon for each separate database.
- This process also allows for different security levels to be applied to different databases.

3. Citrix / Terminal Server / Application server

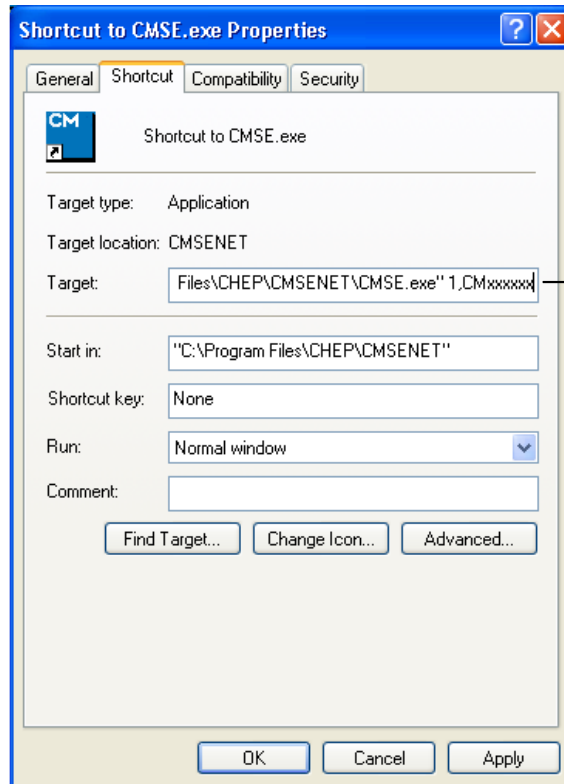
- CHEPMate Server component installed on a File Server or one of the server machines on a Citrix Server Farm.
- CHEPMate Client Component installed on a Citrix Server



Note – It is best to have server and client installed on separate machines in a Citrix environment.

Multiple Icons for Multiple Databases / Icon setup for each Profile:

- To have multiple icons of CHEPMate client pointing to an individual database, follow this process:
- 1. Create a shortcut of CMSE.exe from C:\Program Files\CHEP\CMSNET (**The shortcut should be created from this path only**)
 2. Go to the properties of CMSE.exe and amend the Target field as shown in the picture below



Initial Target:-

"C:\Program Files\CHEP\CMSNET\CMSE.exe"

Change Target to:-

"C:\Program Files\CHEP\CMSNET\CMSE.exe\" 1, CMXXXXX

After quotation mark:

1. Hit the Space bar once
2. Number the database(Numbering should be discrete for each database)
3. \'
4. Database name (i.e. CMXXXXX)
5. Hit apply

This process will allow this icon to access only the specified database.

- This process creates a separate icon for each separate database.
- This process also allows for different security levels to be applied to different databases and just have icons dedicated to required database(s) per Citrix profile.

Instruction for recommended Registry Entry Changes for CHEPMate Client in a Citrix/Terminal Services environment with multiple databases for multiple accounts on the same CHEPMate Server

Setup1 – For each database/account you need to create a copy of the ...CHEP\CMSNET...\DATA folder and anything under that to the location where you need the files for that database/account.

Step 2 – For each of these databases/accounts (entry set) you need to change the following registry entries to this data folder based on which instance each of them are

1. [HKEY_LOCAL_MACHINE\SOFTWARE\CHEP\CMSNET...\PROGRAM]
"EquipmentPicturesFolder" =
"C:\Program Files\CHEP\CMSNET...\Images\EquipmentPictures"
2. [HKEY_LOCAL_MACHINE\SOFTWARE\CHEP\CMSNET...\PROGRAM]
"ExportDefaultFolder" =
"C:\Program Files\CHEP\CMSNET...\DATA\ExportFiles"
3. [HKEY_LOCAL_MACHINE\SOFTWARE\CHEP\CMSNET...\PROGRAM]
"ImportDefaultFolder" -
"C:\Program Files\CHEP\CMSNET...\DATA\ImportFiles"

3 UPGRADE SERVER

3.1 WHAT IS THE CHEPMATE SERVER?

◆ **Single client, standalone PC installation**

This type of install is where CHEPMate is used on a single PC. For this install the CHEPMate server is the same machine/Computer that CHEPMate is used on.

◆ **Networked workstation installation -** Install the Server on the File Server.

This type of install is where CHEPMate is used in a network environment with single or multiples clients. The CHEPMate Server may be on a different Machine than the one CHEPMate is used on.

To identify the Machine/Computer that is acting as the CHEPMate server follow the instructions below.

- Open CHEPMate and log in. (Must have access to the Admin Module)
- Select the “Admin” module and click on the “Licences” Screen.
- The server name is at the bottom right (Minus the \CHEPNET).

See example below.

CHEP[®] CHEPMate

Licence Details

Current Own Location : 1610910001 Parent Location : 1610910001

Licence Details | Periods & Retention | Docket Number Info | Data Import/Export | Report Settings

CHEP Account : 1610910001 Company Name : CHEP Training - Fizzy Drink Co

Company Address : 76 Bottler Avenue
GLENDALE NSW 2999

AutoRec Location: [Dropdown]

Program Info

Program Version : 3.1 Version Date : 6-9-2010 16:07:00
Patch Number : Patch Date :
Date of First Install : 6-9-2010 16:07:00 Server : FH45525\CHEPNET

Main Add New Licence Update

3.2 SERVER UPGRADE PROCESS

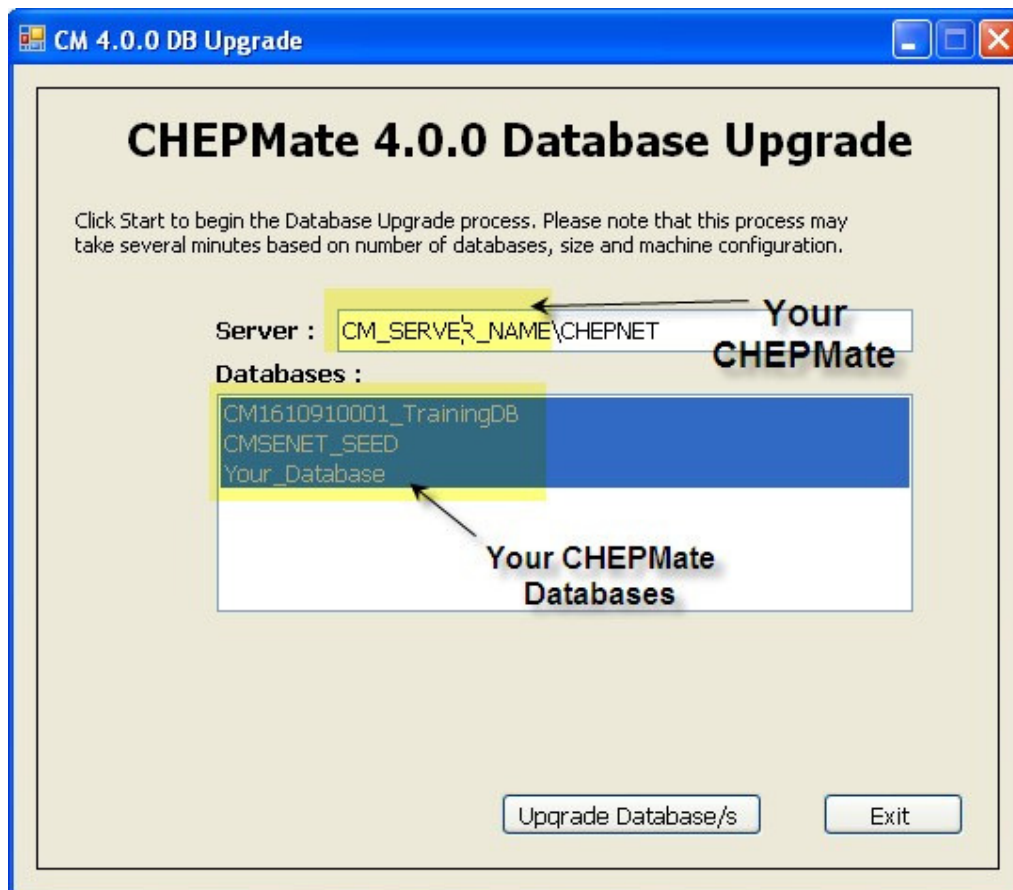
NOTE: The Server upgrade is for Upgrading a CHEPMate Version 3.2.0 or 4.0.0 database to version 4.1.0 ONLY.

Perform the following procedure to Upgrade the Server:

1. Go to the following Website.

<http://au.chepsupport.com/software/CMv410DBUpgrade.exe>

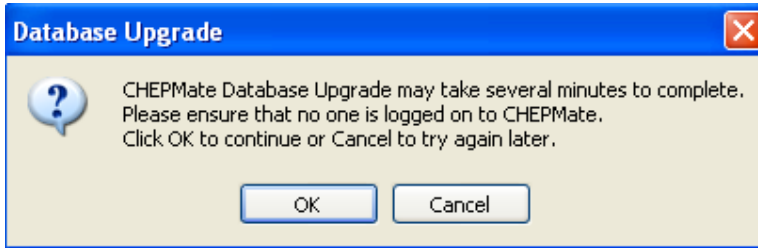
2. Your Internet Browser will prompt you to save or Run the file. Select **Save**.
3. Save the file onto the CHEPMate Server Machine and note down the saved location. E.g C drive.
(See section 3.1 of this document if you do not know the CHEPMate server Machine)
4. Open the location on the CHEPMate Server noted down above.
5. Double click on the file **CMv410DBUpgrade.exe**. The following screen displays.



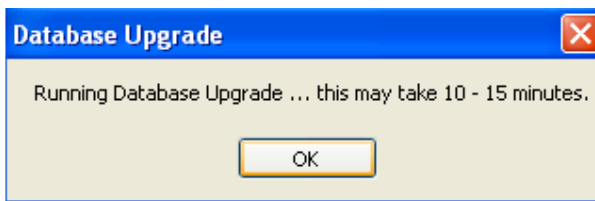
6. Click **Upgrade Database/s**

7. Click OK on the Screen Below.

Note: All databases on the server will be upgraded at the same time.

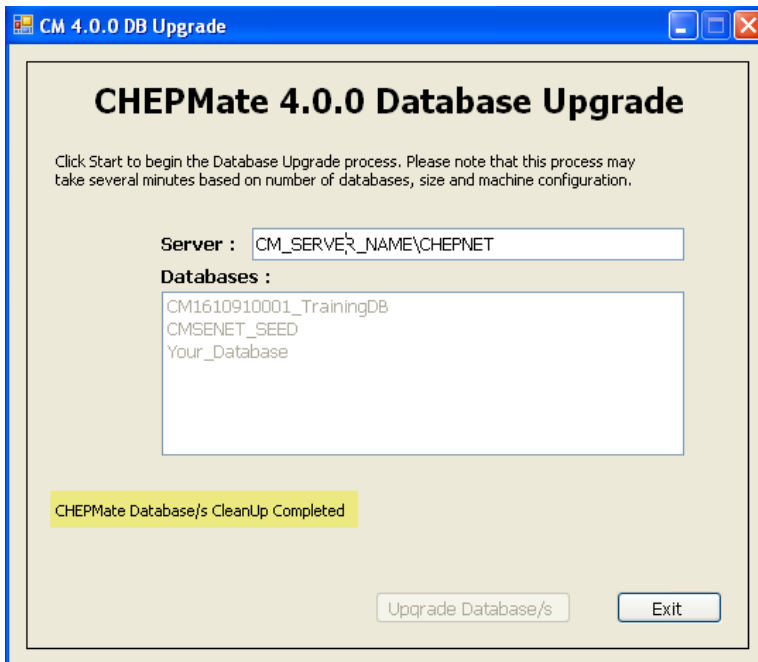


The Following Message will appear once for ALL your CHEPMate Databases that are about to be upgraded.



8. Click **OK** each time.

When completed the following screen will display



9. Click **Exit** to Finish the CHEPMate Server upgrade.

The Server Upgrade process is now complete

4 CLIENT INSTALL

4.1 WHAT MACHINES NEED TO BE UPGRADED?

Any computer that can access CHEPMate NEEDS to complete the following process to be upgraded to Version 4. If you require assistance at any point please contact the CHEP Helpdesk by phone on 13 24 37 or email at au.helpdesk@chep.com.

Note: The upgrade consists of 2 parts.

1. Uninstall of the previous Version CHEPMate Client (First)
2. Install of the New Version Client (version 4).

4.2 UNINSTALL PREVIOUS CHEPMATE CLIENT


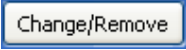
Note

Prior to Installing the New CHEPMate Version 4 Client **you must uninstall the previous CHEPMate Client** through Add/Remove Programs.

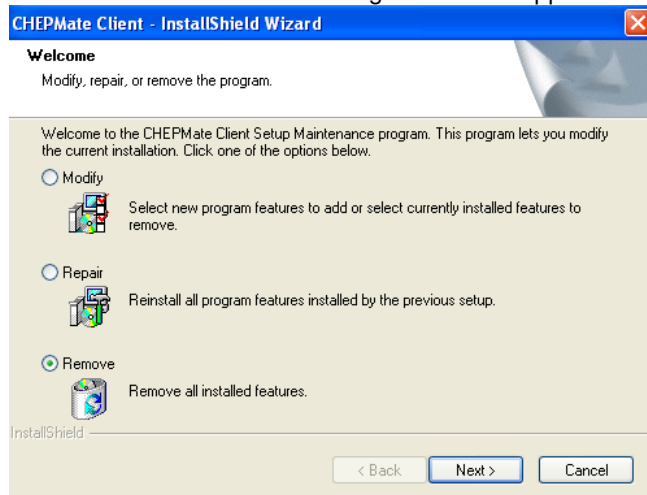
IT Assistance is recommended when uninstalling any program.

Below is the process for uninstalling the previous CHEPMate version.

This process may vary depending on what version of Windows you are using. If unsure please refer to your IT support person.

1. Select **Control Panel** from your **Start Menu**.
2. Double Click **Add/Remove Programs**
3. From the list select  **CHEPMate Client**
4. Click the  Button

After a few moments the following window will appear

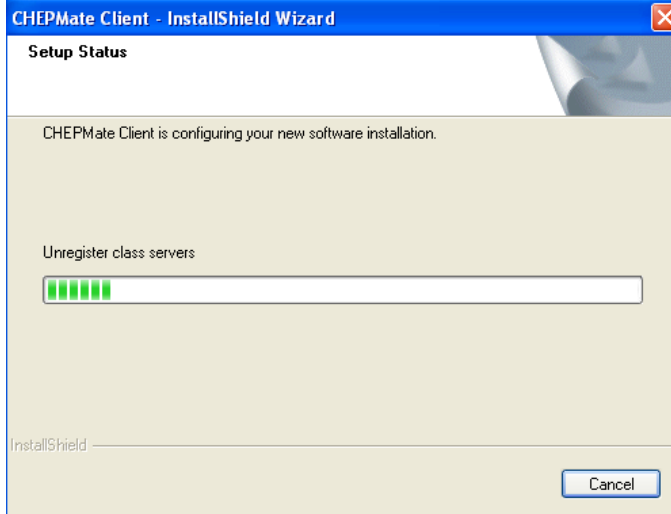


5. Select **Remove** and then Click **Next**

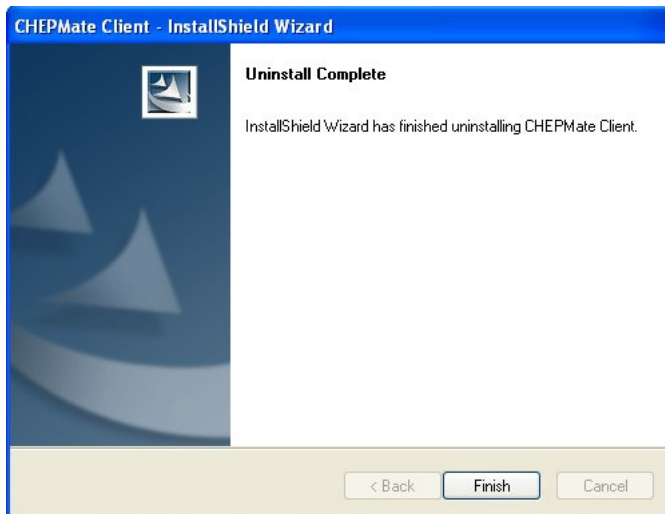


6. Click **YES** to remove the CHEPMate Client

Wait for the process to complete



7. Click **Finish** at the screen below



The Old CHEPMate Client has now been uninstalled. Please complete the install of the New CHEPMate Client.

4.3 INSTALLATION PROCESS

Note ✓

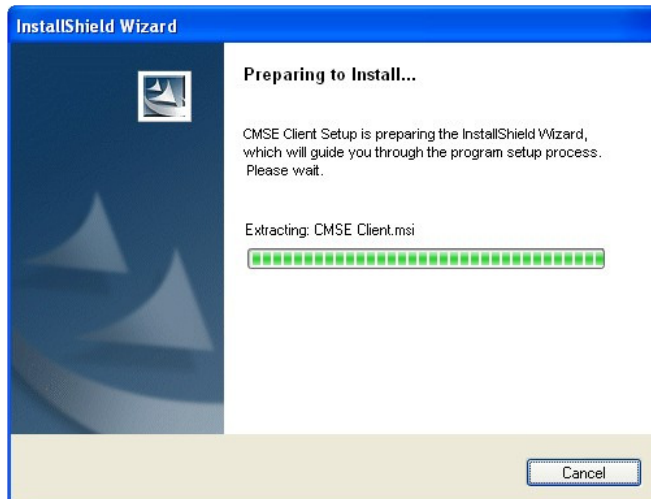
.NET 2.0 may be installed where required as part of this installation.

Perform the following procedure to install the Client:

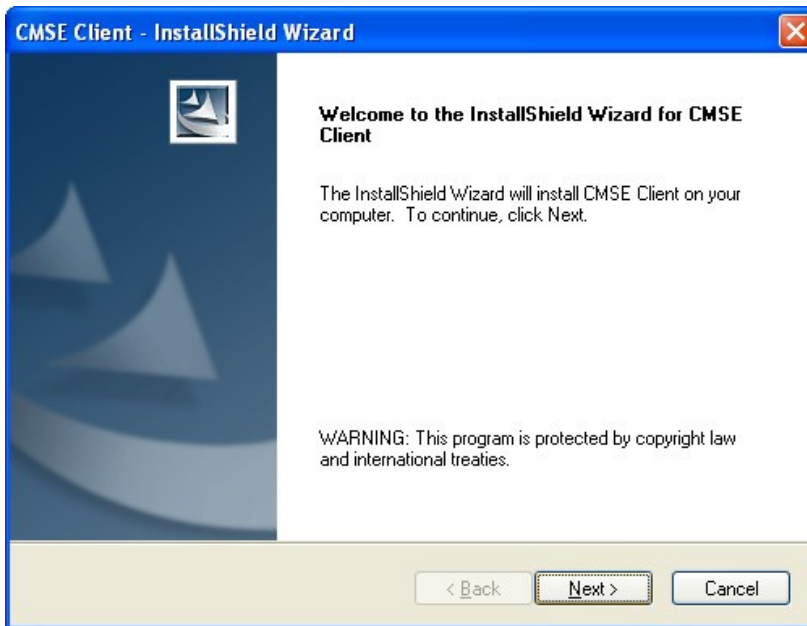
1. Double click on the **Client** file. (<http://au.chepsupport.com/software/setupCM410Client.exe>)



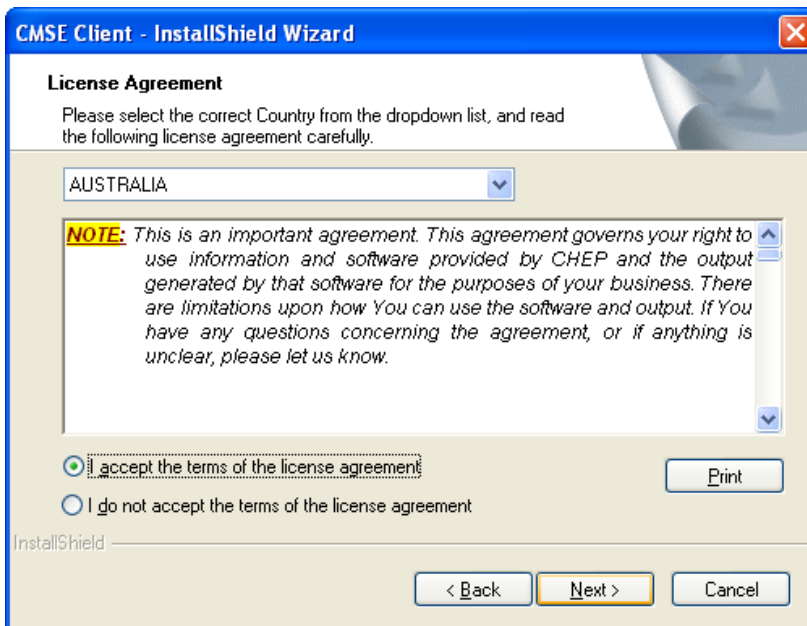
2. Double-click **setup** (you may experience a short time lag before the Wizard appears)



3. The Install Wizard will load ...

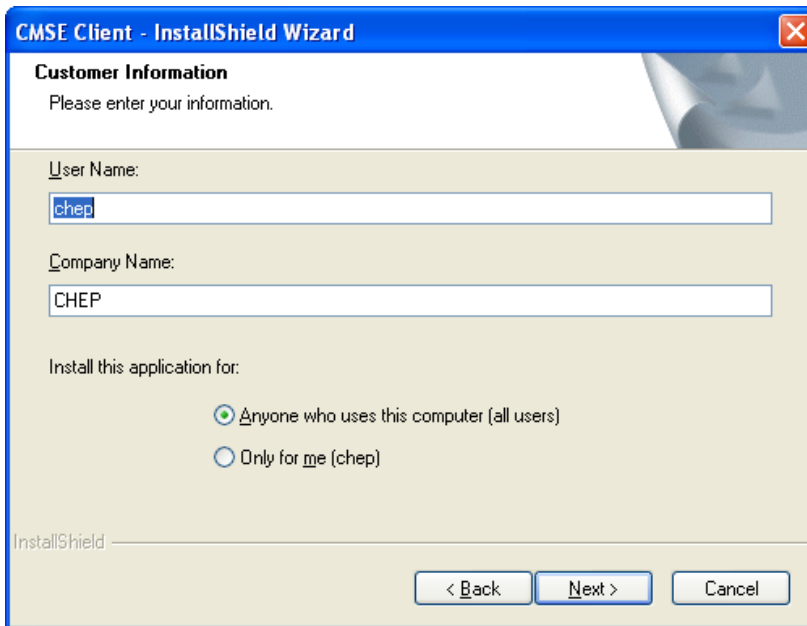


4. Click **Next**

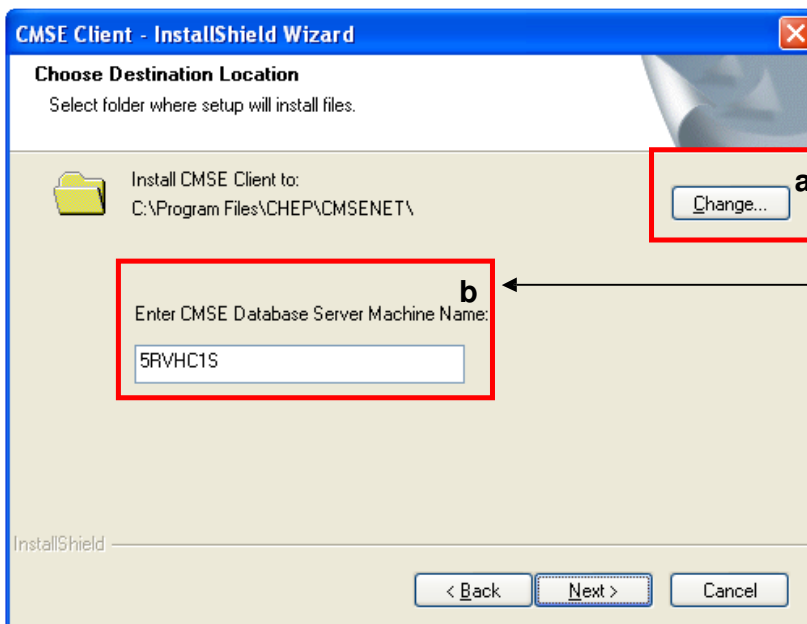


Please read and confirm your acceptance of the terms of the license agreement by checking the "I accept the terms of the license agreement" radio button if you want to proceed with the installation.

5. Click **Next**



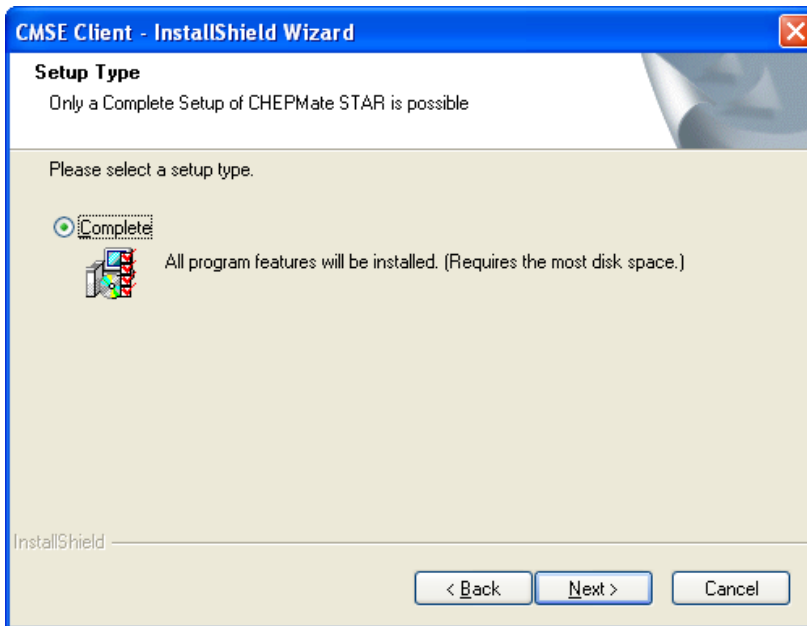
6. Leave the radio button checked (as above) and click **Next**.



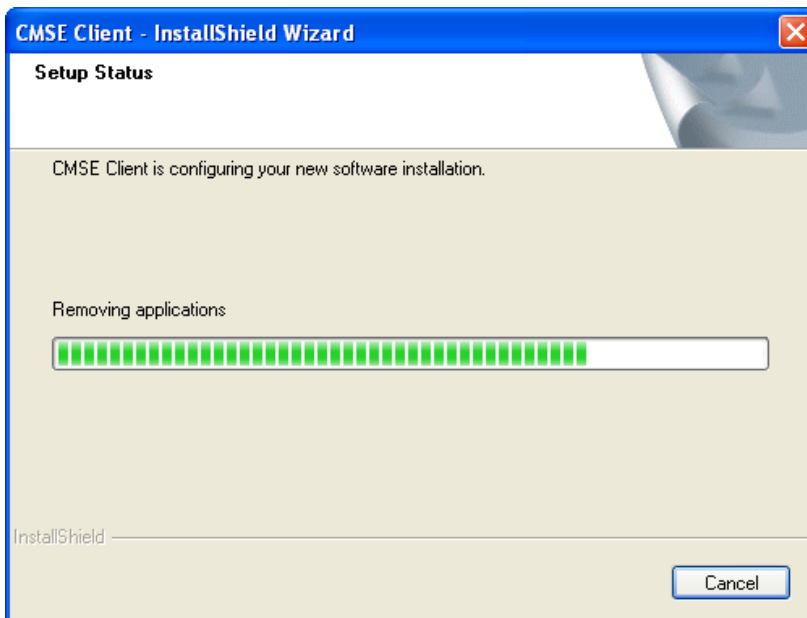
If you are performing a 'Client Installation' for workstations in a network setup, you must change the Machine Name to that of the machine, which the CHEPMate Server was installed on.

7. **a)** Select the destination folder for the Client Install by clicking on the **Change** button.
b) The Server Machine Name will default to the name of the machine you are installing on.

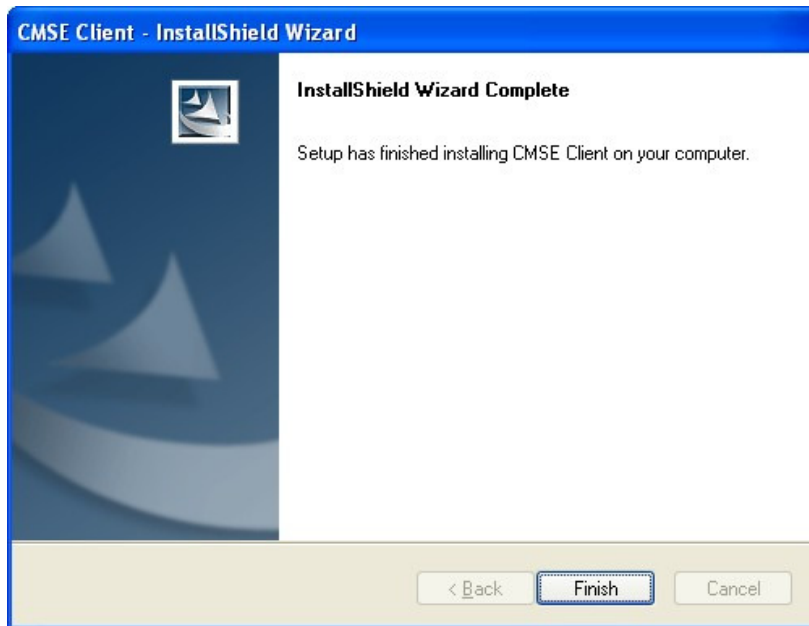
The Machine Name must mirror the name of the machine which has the CHEPMate Server installed.



8. Click **Next**



Wait for this process to complete.



9. Click **Finish**

The Client Install process is complete.

4.4 CHANGING THE DATABASE

Once you have completed the processes outlined in the previous sections your CHEPMate System is Upgraded to Version 4.

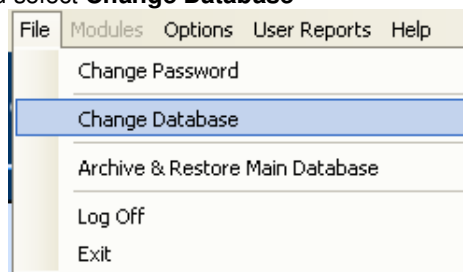
All that is left is to select your database and continue working.

Changing the Database

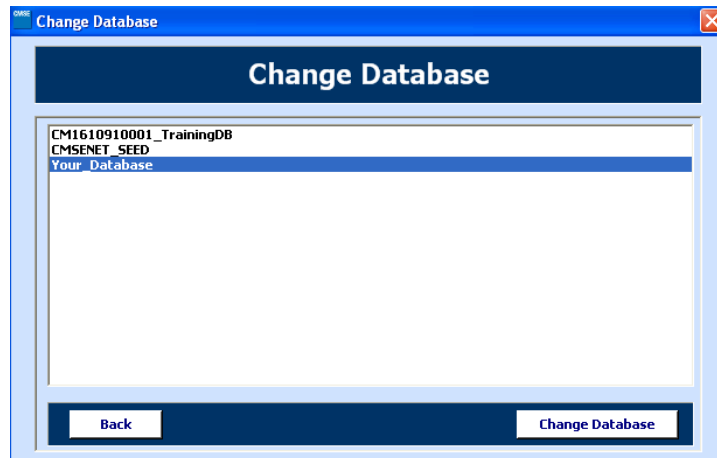
1. Log on to CHEPMate using the CHEP Master Pass

Contact CHEP on 13 24 37 and request a daily CHEPMate pass.

2. From the File Menu select **Change Database**



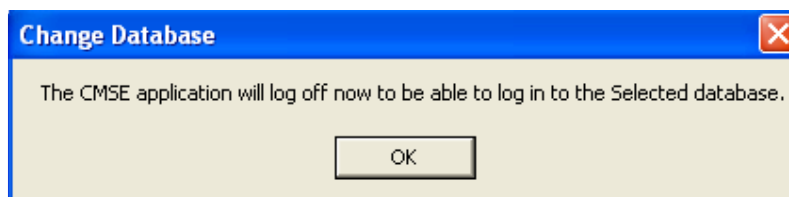
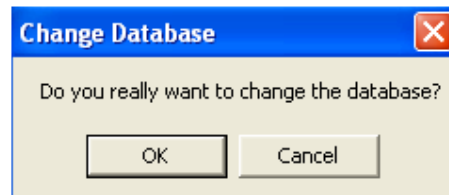
3. Select your Database name from the list.



Note:

- Your Database Name is “CM” followed by your account number unless you have changed it. Eg. CM1610123456
- If you are unsure what database to select please contact the CHEP Helpdesk on 13 24 37 for Assistance.

4. Once selected Click **Change Database**
5. Click OK through the following prompts.



6. Log onto CHEPMate using Your **normal User ID and Password**

YOUR CHEPMATE IS NOW UPGRADED