

SINGLE USER LICENSE UPGRADE

This document outlines the steps required to upgrade your InfoManager3 single user license to InfoManager 3.5 running on the Windows7 operating system.

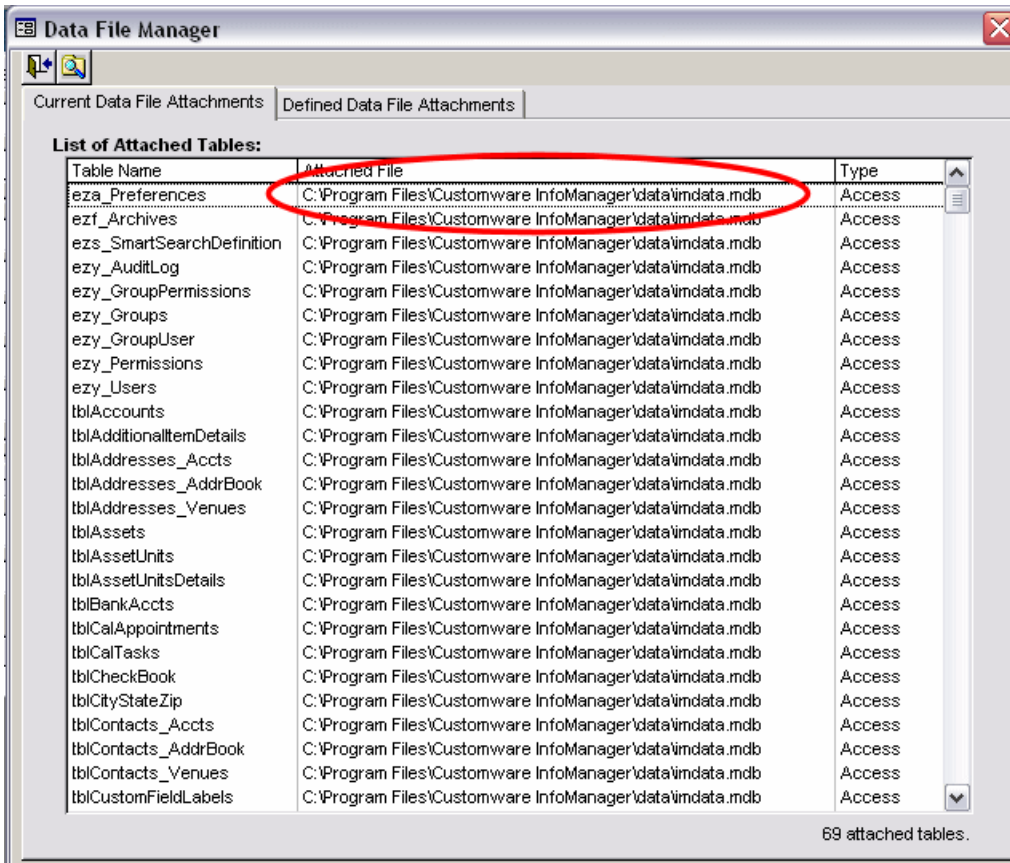
STEP 1: Confirm Your Current InfoManager3 Data File and Data Folder

In order to determine your current data file in use, we need to check the Data File Manager portion of the software.

1. Open InfoManager3 and in the menu bar located on the left-hand side of the screen click the SETUP / TOOLS button at the bottom of the menu bar



2. Now click the DATA FILE MANAGER icon (3rd one down the list) and the Data File Manager window will be displayed. By default, the 2nd tab of Data File Manager (Labeled "Defined Data File Attachments") is currently visible. Click the first tab labeled "Current Data File Attachments" and you will see something like the following:



The important thing to note here is the file name and path in the middle column. This indicates your current data file AND the path (or folder) in which it is stored. So in the example above, the current InfoManager data file is **imdata.mdb** and the folder in which it is located on your current computer is **c:\program files\customware infomanager\data**. By knowing this...we will be able to easily RECONNECT to the same data file under Windows 7. PLEASE WRITE DOWN OR MAKE NOTE OF BOTH THE DATA FILE AND CURRENT PATH.

3. Exit InfoManager3

STEP 2: Backup Your Existing InfoManager3 Data Folder

1. Now that you know where your data file and data folder are stored, you need to make a backup. By default the data folder is located in the **c:\program files\customware infomanager\data** folder on the computer where InfoManager3 is currently running. However, your path may be different based on the previous step so adjust the following directions accordingly. If this is a computer OTHER THAN your new Windows 7 computer OR if you are

going to perform a direct upgrade to Windows 7 on this computer, you will need to copy this data folder backup to some sort of removable media (i.e. USB memory key, CD-ROM, USB external hard drive, etc.) so you can transfer it to the new Windows 7 computer.

2. Confirm you have a good backup of the entire data folder by looking at the contents of the folder on your removable media. AT MINIMUM... the data folder backup should contain the following:

Name	Date modified	Type	Size
docs	3/9/2010 10:06 PM	File folder	
images	3/9/2010 10:06 PM	File folder	
archive.mdb	11/12/2004 1:26 AM	Microsoft Office A...	2,456 KB
empty.mdb	2/1/2010 6:17 PM	Microsoft Office A...	2,484 KB
imdata.mdb	2/1/2010 5:56 PM	Microsoft Office A...	2,580 KB
sample.mdb	2/25/2010 9:48 AM	Microsoft Office A...	3,736 KB

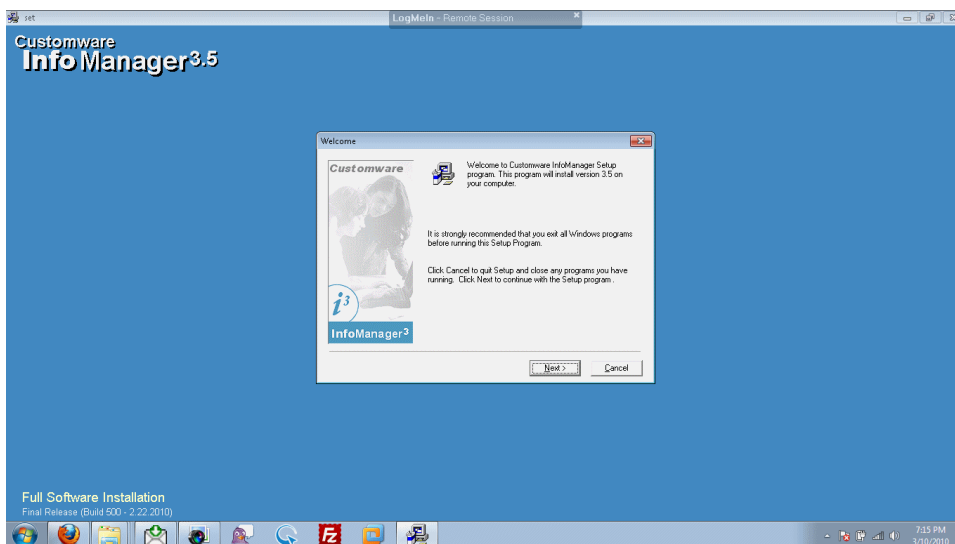
You may have additional files and/or folders in your backup...but if you have at LEAST the same 2 folders and 4 folders as listed above, then proceed with the next step.

STEP 3: Install InfoManager3.5 On Your Windows 7 Computer

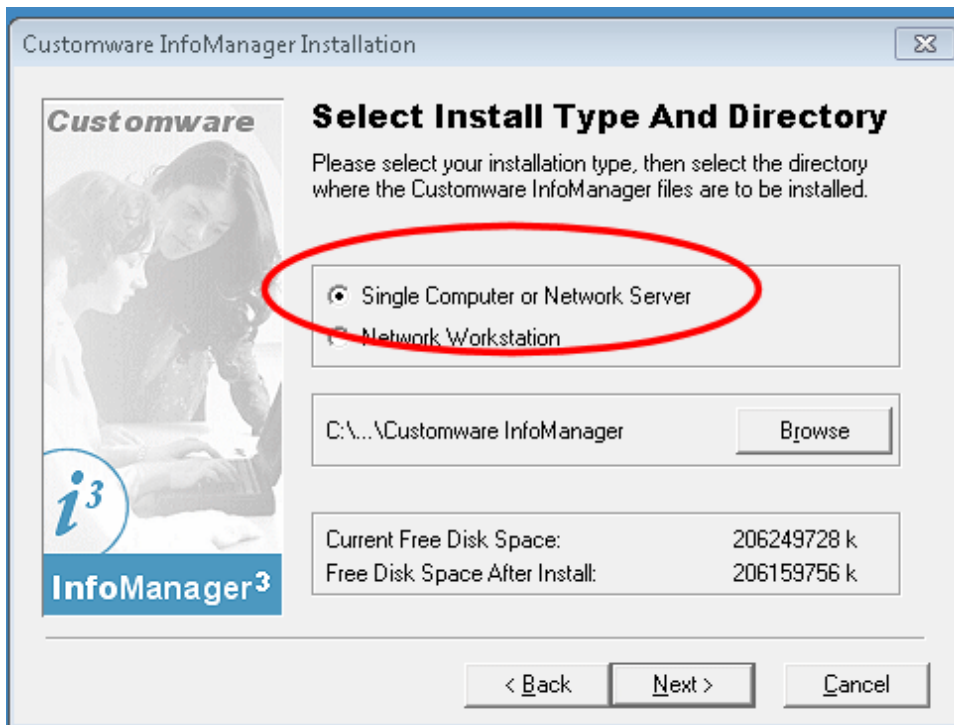
1. BEFORE installing InfoManager3.5 on Windows 7, MAKE SURE you do not have any previous installations of InfoManager3 already on the computer. If so, there could be issues during the install. Under Windows 7, click START – CONTROL PANEL – PROGRAMS – UNINSTALL A PROGRAM and make sure Customware InfoManager is NOT listed as being currently installed. If it is, uninstall it AS WELL AS the **Microsoft Access 2000 Runtime** and **Total Access 2002 Memo** programs as well. **THIS IS IMPORTANT TO CONFIRM PRIOR TO MOVING TO THE NEXT STEP.**
2. Run the InfoManager3.5 setup.exe file and the first step is to AGREE to the license agreement and proceed to the Welcome screen.

NOTE: There are 2 different InfoManager3.5 setup.exe files: one is for Windows 7 32-bit and one is for Windows 7 64-bit. Make sure and check which version of Windows 7 you are

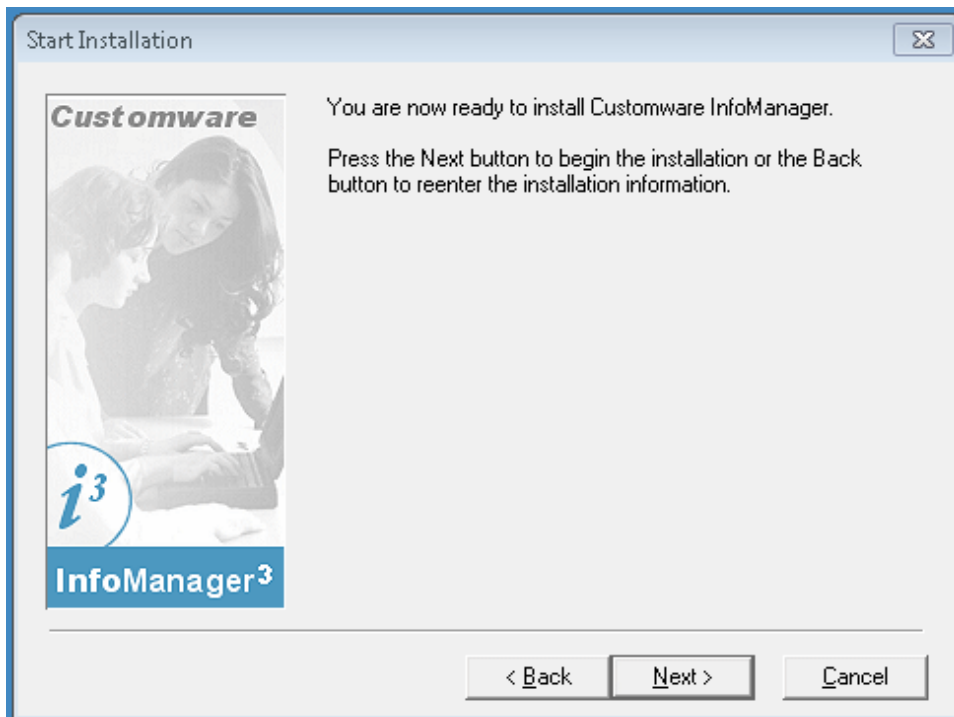
running to know which InfoManager3.5 setup file to run. For steps on how to determine this, visit: <http://windows.microsoft.com/en-US/windows7/32-bit-and-64-bit-Windows-frequently-asked-questions>



3. On the Select **Install Type and Directory** prompt, select Single Computer or Network Server install type. The install path will be (by default) c:\program files (x86)\customware infomanager (for 64-bit versions of Windows 7) OR c:\program files\customware infomanager (for 32-bit versions of Windows 7). We HIGHLY recommend keeping the default install path, but if you wish to change the install path, you can click the BROWSE button and make an alternate selection.



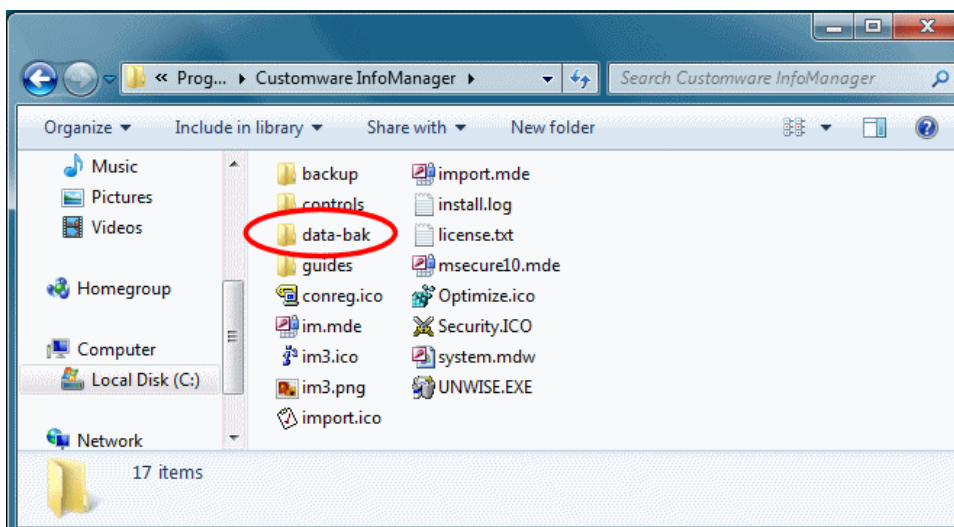
4. You are now ready install InfoManager on Windows 7. Click the **Next** button to begin the install.



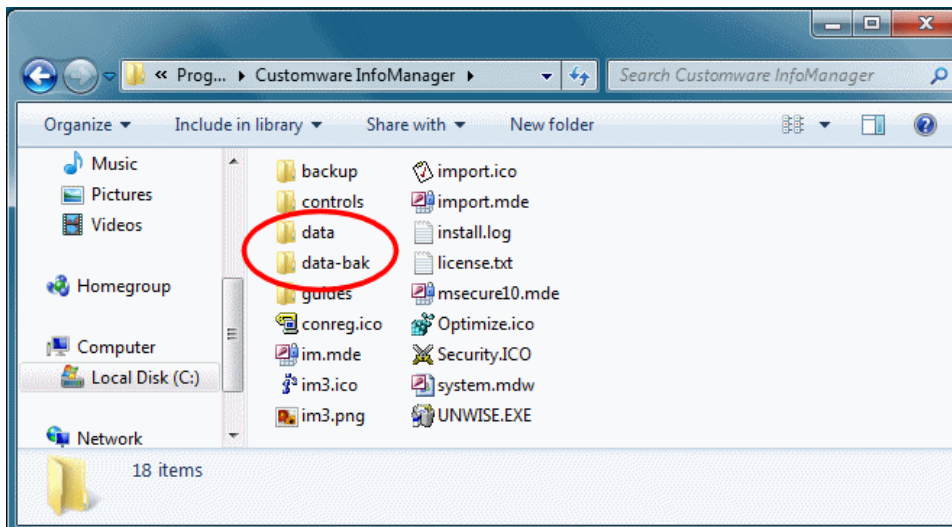
STEP 4: Restore Your InfoManager3 Data Folder Backup

BEFORE RUNNING INFOMANAGER3.5 FOR THE FIRST TIME, you need to restore the backup of your InfoManager3 data folder.

1. Open the folder on your Windows 7 computer where you installed InfoManager3.5. In our example, we will assume this is c:\program files\customware infomanager (for a Windows 7 32-bit computer). Now, rename the existing **data** folder to **data-bak** (for backup).



2. The next step is to restore (or copy) the backup InfoManager3 folder you made in the previous Step 2. Copy the entire data folder you backed up in the previous step to the c:\program files\customware infomanager folder on the Windows 7 computer. You will now see two (2) data folders: one labeled **data** (the one you just copied from the backup) and one labeled **data-bak** (the one you renamed earlier).



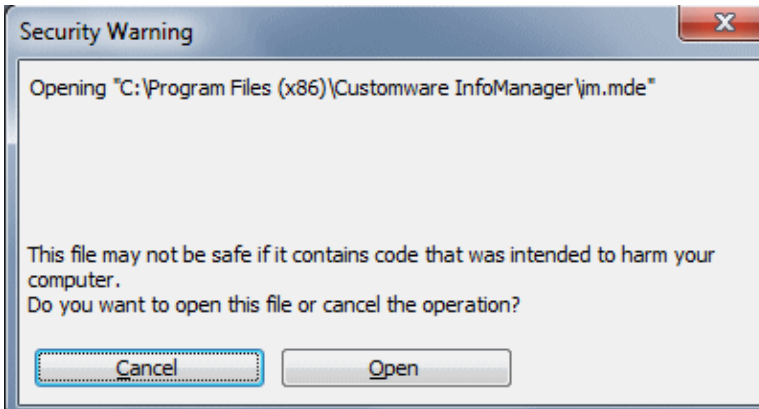
STEP 5: Running InfoManager3.5 for the First Time and Registration

1. Double-click on the InfoManager3.5 icon on your desktop to run InfoManager3.5 for the first time. You will see an initial Security Warning about "Blocking unsafe expressions". Select **Yes** to block unsafe expressions. InfoManager will then close and you will need to once again click on the InfoManager3.5 icon on the desktop. You should not see this specific security message again.

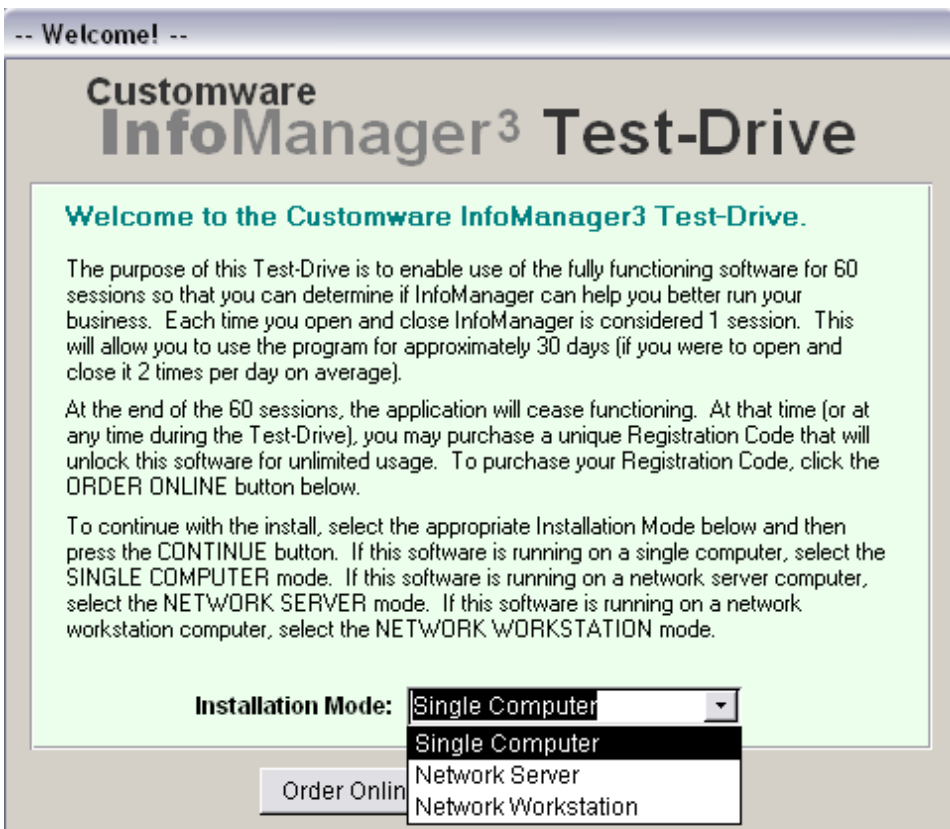


2. The second time you open InfoManager3.5 however, you will see another security warning prompt warning that some files may be harmful...when opening the InfoManager3.5 program file (im.mde). Click the **Open** button.

NOTE: The addendum to this document outlines how to disable this warning prompt from displaying EVERY time you open InfoManager3.5

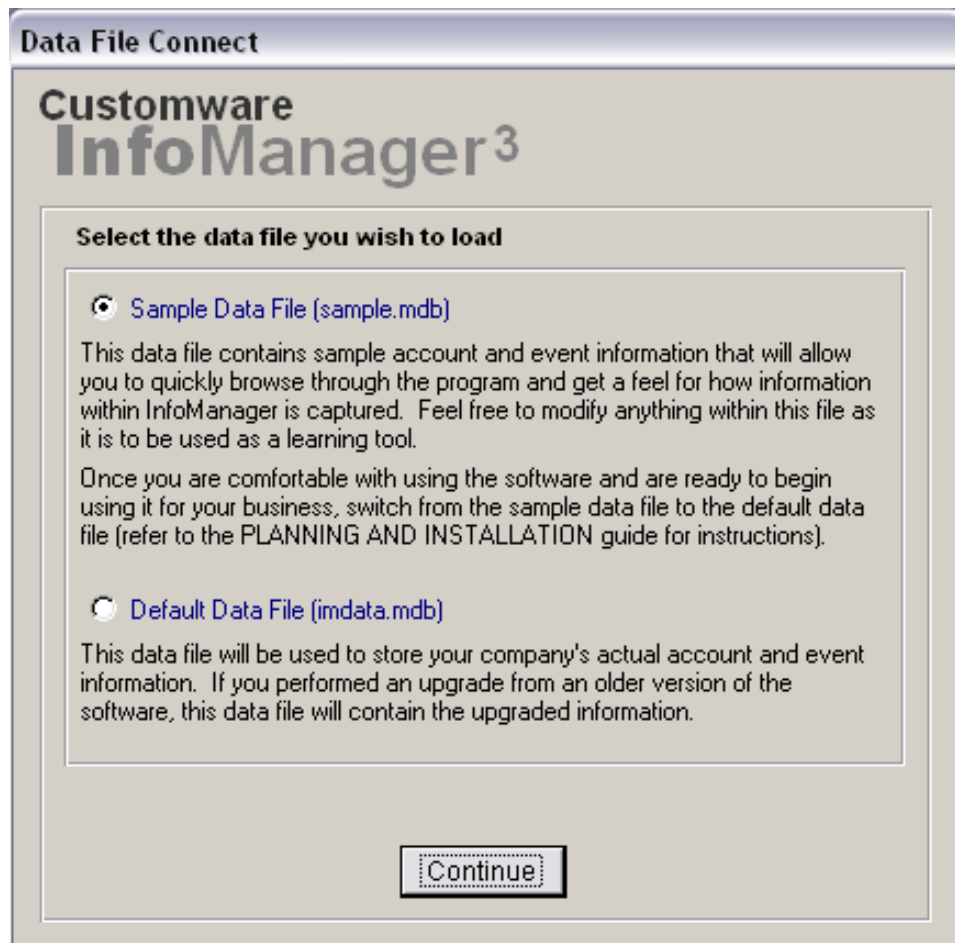


- The next prompt will be the Installation Mode dialog box. Select **Single Computer** for the installation mode and then click **Continue**.

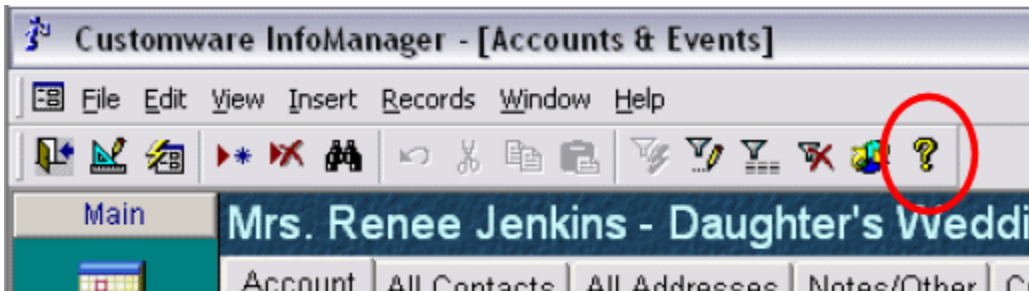


- The next screen will prompt you for which data file you wish to connect. REMEMBER in step 1 of this document where you determined which data file was connected under InfoManager3?...well you need to select that same data file here. If the data file you had

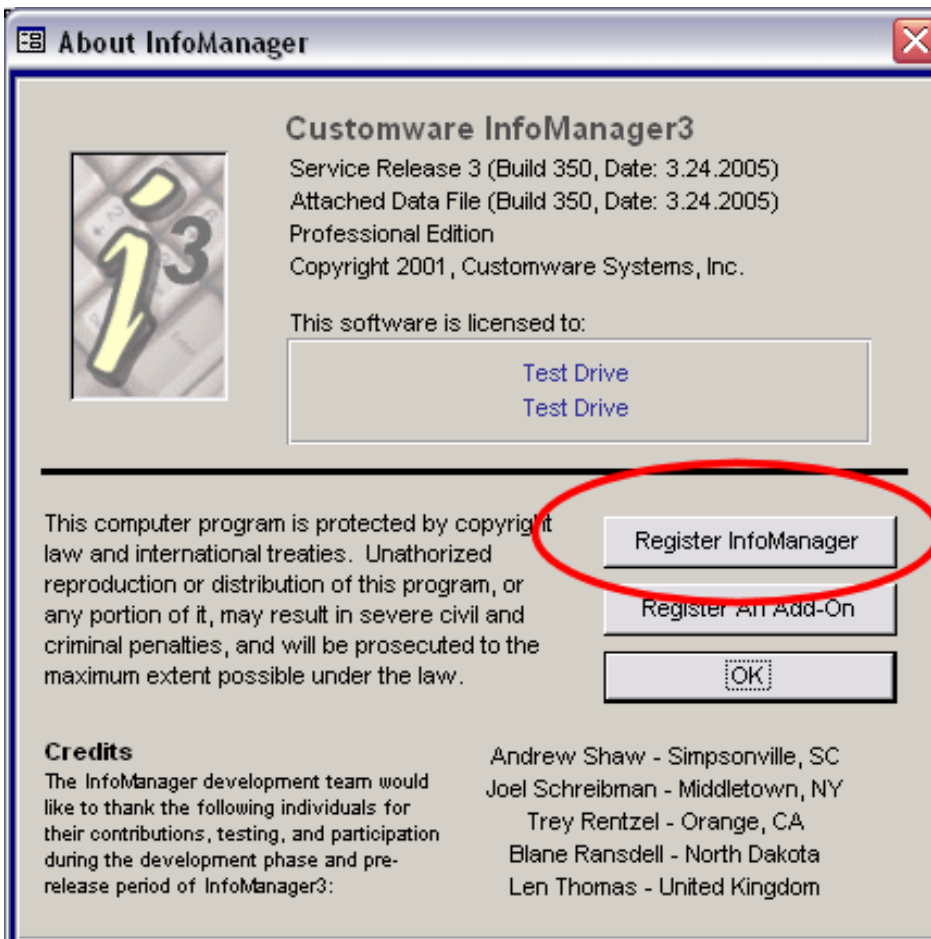
connected in step 1 was the Default Data File (imdata.mdb), then you will select **Default Data File** here. If the file in step 1 identified was the Sample Data File (sample.mdb), you will again select **Sample Data File** here as well and then press the **Continue** button.



5. InfoManager3.5 will then attach to the selected data file and open in Test Drive mode. The last step in the upgrade process is to register the software. Click the **About InfoManager** icon (button with the image of a question mark) at the top of the Accounts & Events form



- This will open the About InfoManager dialog box. Now click the **Register InfoManager** button.



- Lastly, fill in your InfoManager Product Registration information EXACTLY as it appears on your new InfoManager3.5 upgrade purchase invoice (**your InfoManager3 registration code will NOT work**)

Product Registration

Customware InfoManager³

You must enter your company name (case-sensitive), the person's first and last name to whom the software is registered (case-sensitive), your product registration code exactly as it appears on your registration confirmation letter or email, and select the appropriate software edition.

Company Name:

First, Last Name:

Registration Code:

Software Edition:

I have read the License Agreement for this software application and agree to the terms therein. In addition, I understand that I will be personally responsible for ensuring that this software is used only within the legal boudaries of the License Agreement.

(click the checkbox to continue)

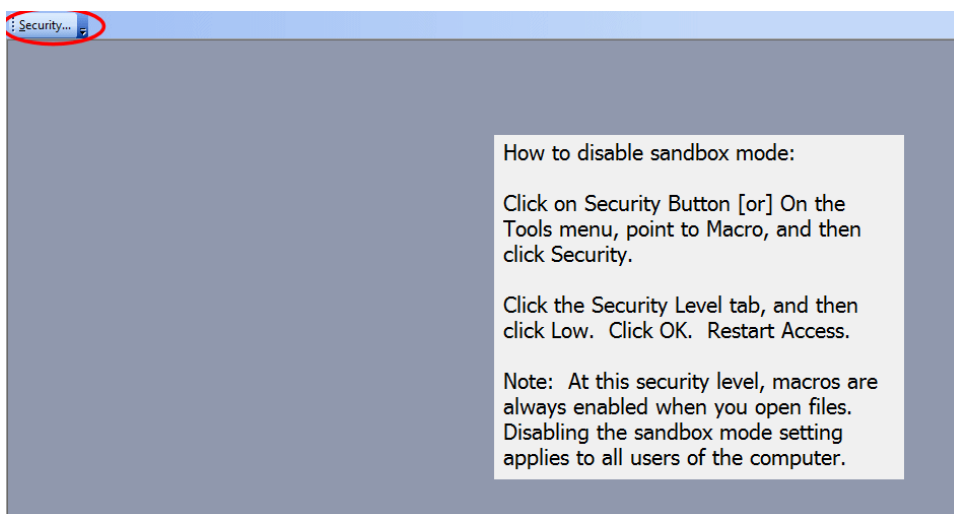
CONGRATULATIONS! You have completed the upgrade to InfoManager3.5 on Windows 7.

If you encounter any issues during this upgrade or require technical assistance completing the upgrade, email us at: support@2surge.com.

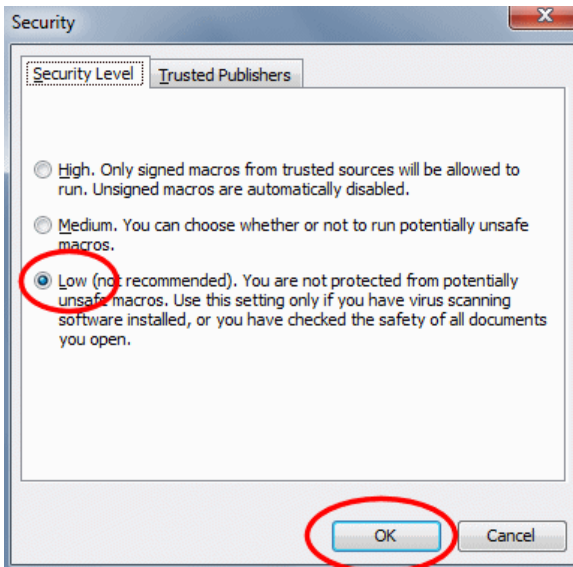
ADDENDUM: DISABLING SECURITY WARNINGS PROMPT UPON STARTUP

To prevent the Security Prompt message from appearing each time you open InfoManager on your computer, you can follow these steps:

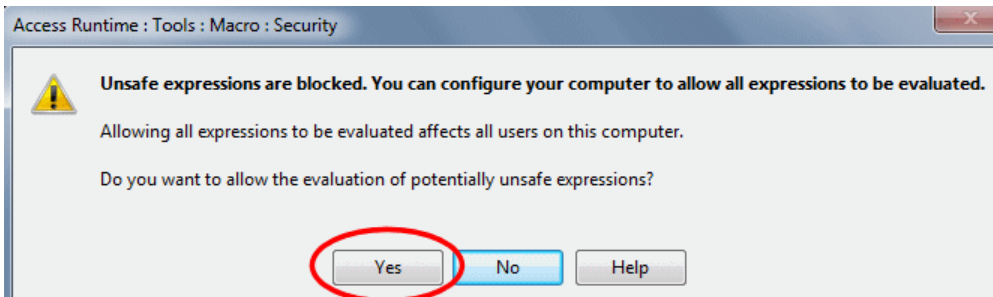
1. Click on **START – ALL PROGRAMS – CUSTOMWARE INFOMANAGER – ACCESS SECURITY**. That will open the Access Runtime Macro Security Tool. The next step is to click the **SECURITY** button in the top left corner of the screen.



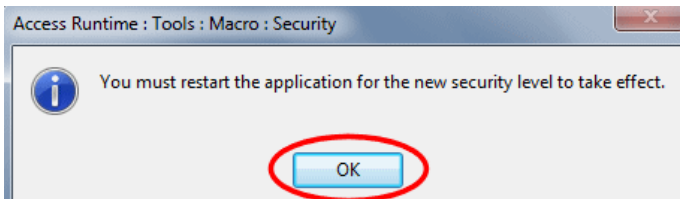
2. That opens the Macro Security Setting window. Click the **Low Security** setting level and then press the **OK** button.



3. You may see yet another warning prompt asking you if you're sure you wish to invoke these settings, click the **Yes** button.



4. And lastly you will have to restart InfoManager3.5 for the changes to take place. Press the OK button.



You will now be able to launch InfoManager3.5 without seeing the annoying security prompts.