

PCSec

Company Secretarial Software

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Installation Instructions

Installing PCSec to a new PC
Adding a new user

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Minimum System Requirements

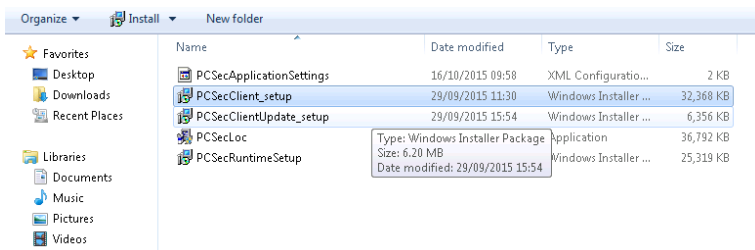
Before installing PCSec please check that you meet with the minimum system requirements below.

- Windows Vista, Windows 7, Windows 10 operating system
- Microsoft Data Access Components 2.8 (MDAC 2.8) or higher
- Microsoft Jet 4.0 Database engine (JET 4)
- .NET Framework Version 2.0 (or ability to install)
- Minimum 245 MB of available random-access memory (RAM). 512 MB or more is recommended
- Minimum 512 MB of available disk space (dependent on the number of companies administered)
- A CD-ROM drive
- Any Windows compatible printer which produces laser quality output and has a minimum of 1 MB of internal memory. The printer should be PCL compatible
- Any Windows compatible network such as Novell or Windows (for multi-user installations)
- Adobe Acrobat Reader 8 (or later), or Adobe Acrobat Professional 8 (or later)
- Microsoft Word 2010 - 2016
- An internet connection using Internet Explorer 7.0 or later
- A Companies House online filing credit account (if using electronic filing)

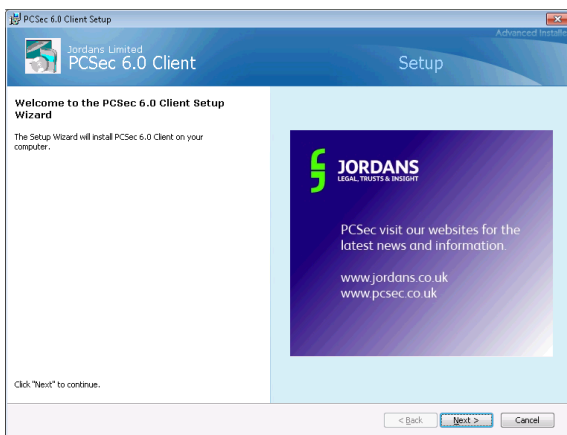
Installation Instructions

From the client PC launch Windows Explorer and navigate to the PCSec installation on your server.

Locate the \\Winsec32\\Database\\Setup folder, this is where the local install file **PCSecClient_setup.msi** resides.



Once located, double-click to launch the installation package. Click **Next >** to continue.

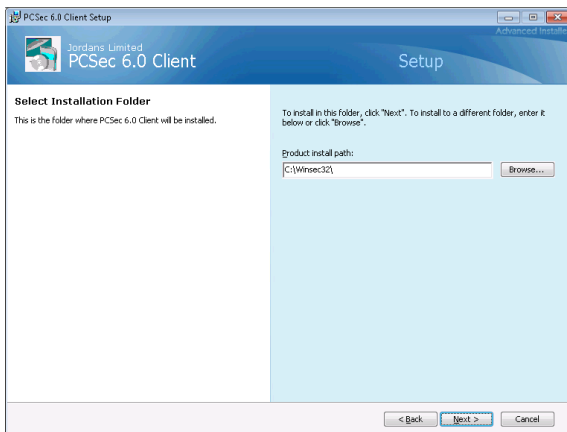


Input the installation location. Note this should be either

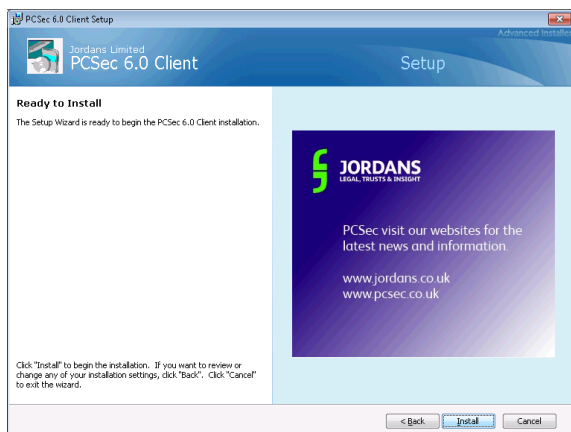
- C:\\Winsec32\\ or;
- C:\\Program Files (x86)\\Winsec32\\

(We don't recommend that PCSec is installed to C:\\Program Files\\ as this can cause issues with virtualisation of the database)

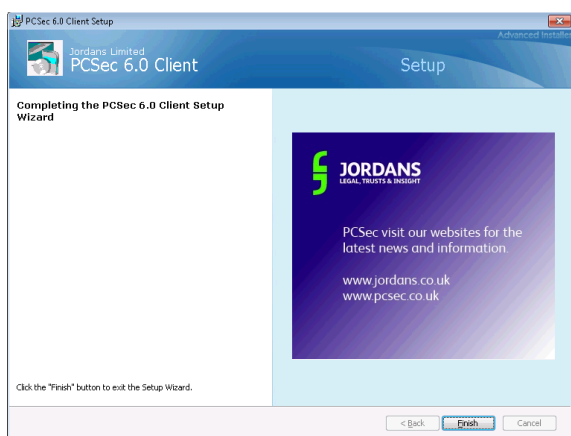
Click **Next >** to continue.



PCSec is now 'Ready to Install'.. Click **Install >** to continue.



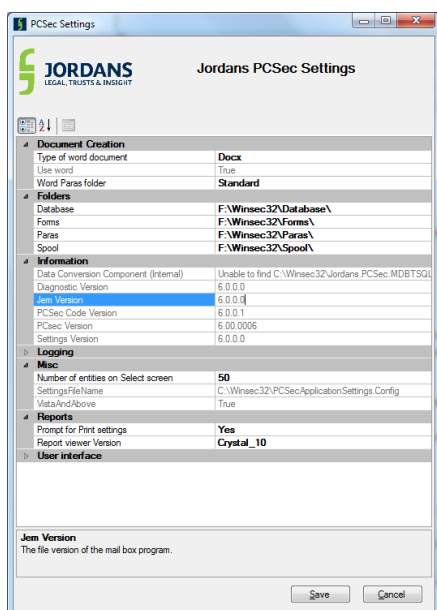
When complete click **Finish >** to exit.



Configuration

Go to the Winsec32 folder on the C:\ drive.

Locate and launch the PCSecSettings application file



In this screen ensure that

Under the **Document Creations** section:

Type of document is set to Docx for users of MS Word 2010 or MS Word 2013; or
Type of document is set to Doc for users of MS Word 2007

Under the **Folders** section:

Database – Points to the Winsec32\Database\ folder on your server
Forms – Points to the Winsec32\Forms\ folder on your server
Paras – Points to the Winsec32\Paras\ folder on your server
Spool – Points to the Winsec32\Spool\ folder on your server

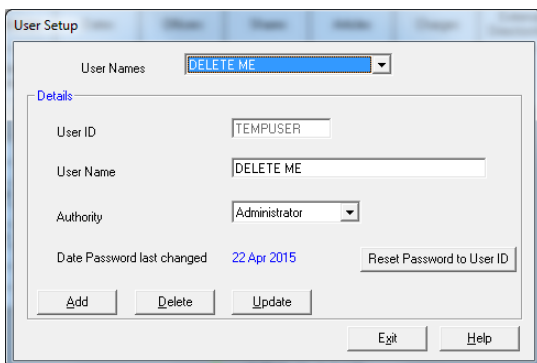
*(If using mapped drives, please ensure that these are correctly mapped and labelled.
Alternatively PCSec can accept the full UNC path)*

Click Save to save the settings and exit.

User Setup & Signon

To create a new user log on, an existing Administrator of user PCSec needs to sign in and set them up.

In PCSec go to **Utilities** and select **User Setup**.



To create a new user click Add.

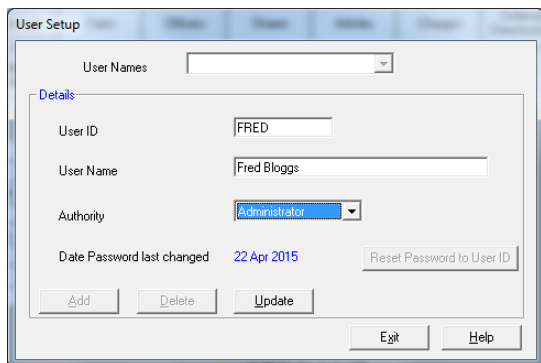
- Enter a User ID (maximum 8 characters alpha/numeric)
- Enter the full User Name
- Select an Authority level

There are three levels of Authority within PCSec:

Read-only: for users who need access to the information recorded in PCSec but who have no responsibility and/or authority to maintain the information.

Update: for operators of the system who are responsible for carrying out the day to day work. These users will be unable to delete companies or personnel from the system. They will also be unable to save System Preferences.

Administrator: full system access.



The 'User Setup' dialog box is shown. It has a 'User Names' dropdown menu at the top. Below it, the 'Details' section contains fields for 'User ID' (FRED), 'User Name' (Fred Bloggs), and 'Authority' (Administrator). It also shows 'Date Password last changed' as 22 Apr 2015 and a 'Reset Password to User ID' button. At the bottom are 'Add', 'Delete', 'Update', 'Exit', and 'Help' buttons.

Click Update to save and add the new user.

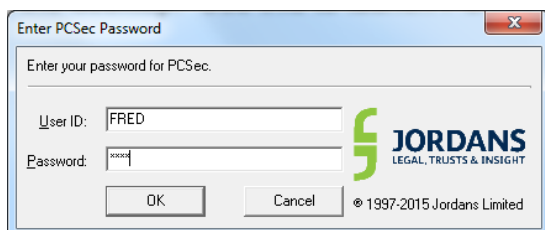
The user is now added to the system.

Initial Logon and Setup

There should now be a PCSec32 icon on the desktop. Use this to launch PCSec.



Enter the User ID and Password (the password will be the same as the User ID).



The 'Enter PCSec Password' dialog box is shown. It prompts the user to 'Enter your password for PCSec.' It has fields for 'User ID' (FRED) and 'Password' (fred). The 'JORDANS LEGAL, TRUSTS & INSIGHT' logo is on the right. At the bottom are 'OK' and 'Cancel' buttons, and a copyright notice '© 1997-2015 Jordans Limited'.

If required, once logged in, the user can change their password by going into **Utilities** and selecting **Change Password**.