



BPMS SOFTWARE

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## BPMS 7 Administrator

# Setting up a Test Environment

Version 1.0

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## Purpose of this Document

This document explains how to set up a Test environment for BPMS Administrator.

A test environment can be helpful in the following situations:

- To train new staff
- To test a new version of a BPMS application after a new release before updating the production environment
- To investigate how to reproduce a software glitch
- To test BPMS Import feature against a test database before executing in production

## Step 1 – Copy Back-End from Production Environment

Make a copy of the production back-end folder to a test folder. (e.g.

\\MYLAN\Water\BPMS7AD\_Test\)

## Step 2 – Copy SQL Server Database to Test Server (if applicable)

If you have a SQL Server database, ask your IT staff (e.g. database administrator) to make a copy of the production database to a test server. We recommend using a different database name than in the production environment such as **BPMS\_Test**, preferably installed on a different database server.

Detailed instructions can be found in document

[www.bpms.net/docs/BPMS7\\_Admin\\_SQLServer.pdf](http://www.bpms.net/docs/BPMS7_Admin_SQLServer.pdf). If you are upgrading from version 6 to version 7, follow instructions from section “**STEP 2c – Upgrading from v6 with SQL Database**”.

## Step 3 - Software Download (Test Environment)

If you need to install or reinstall the full “**BPMS 7 Admin (Test)**” application, click URL below:

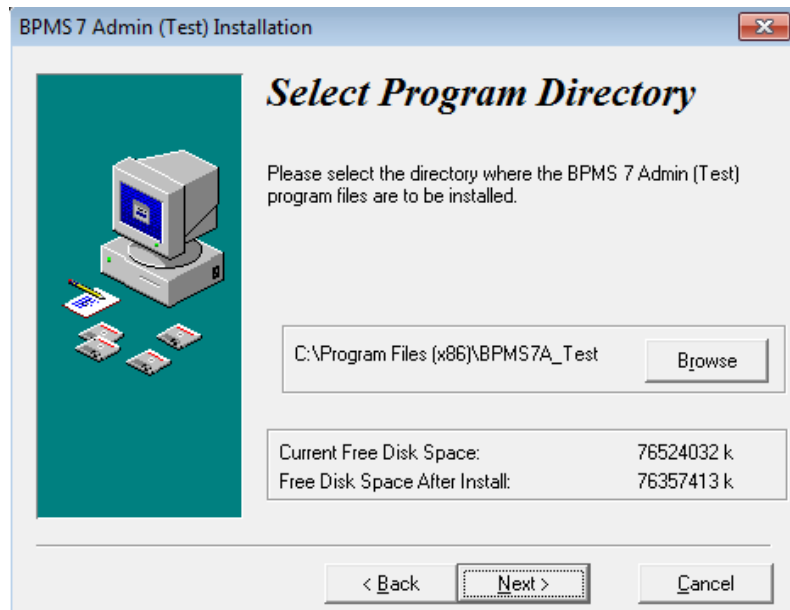
[DOWNLOAD BPMS 7 \(Test\) Full Install](#) (Approx. 110 MB)

To update on a computer that already has “**BPMS 7 Admin (Test)**” installed, click URL below:

[DOWNLOAD BPMS 7 \(Test\) update](#) (Approx. 13 MB)

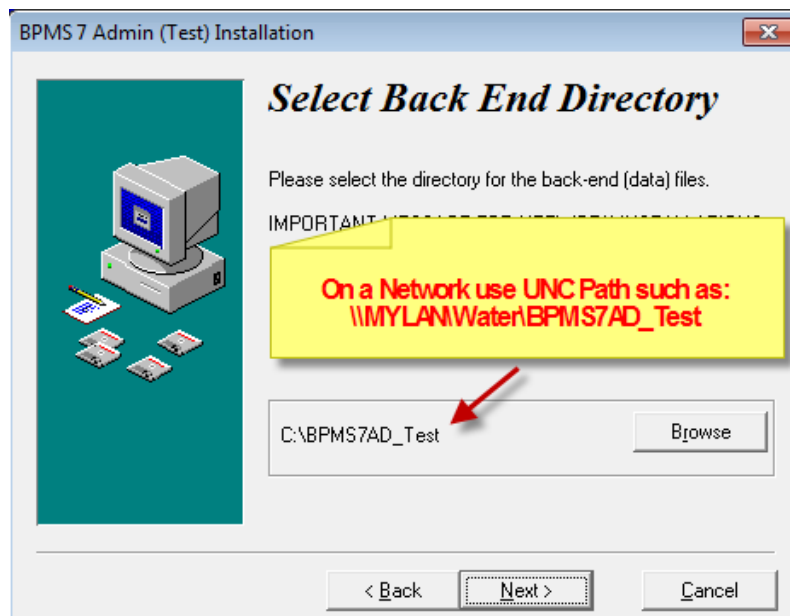
## Step 4 – Install Software

Run the **SETUP\_BPMS7A\_TEST.EXE** file downloaded in Step 3.




The default installation folder for the client application is C:\Program Files (x86)\BPMS7A\_Test.

When you get to the step where you need to select the back-end folder, be sure to specify the test folder created in Step 1. If folder is on a network, use a UNC path (e.g. **\\MYLAN\Water\BPMS7AD\_Test**) instead of a mapped drive as shown below.



After installation, a red icon labeled “**BPMS 7 Admin (Test)**” should be added to the desktop. If you are afraid the user may accidentally open this app and enter production data, you can

remove that icon and tell the user that it can be run from Windows Start  => **All Programs => BPMS 7 Admin (Test).**

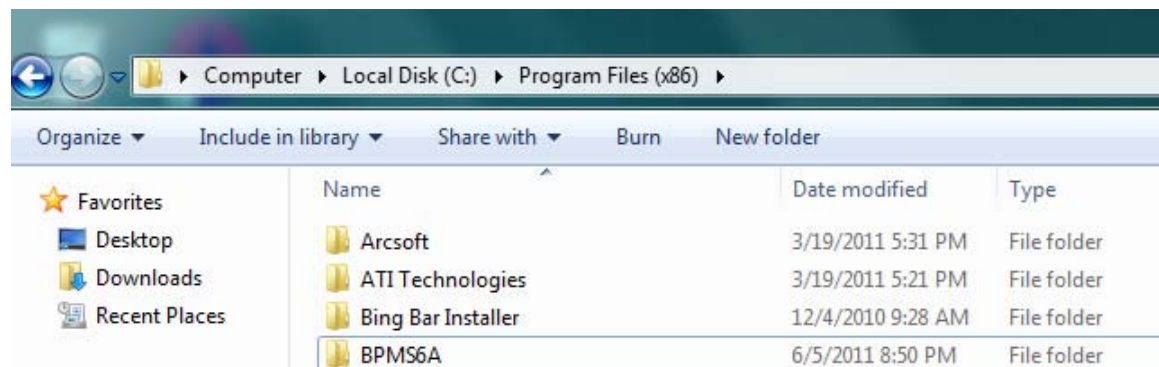
## Step 5 – Grant Modify Permissions to BPMS Client Folder

Each user that will run BPMS needs modify permission to the BPMS application folder by following these steps:

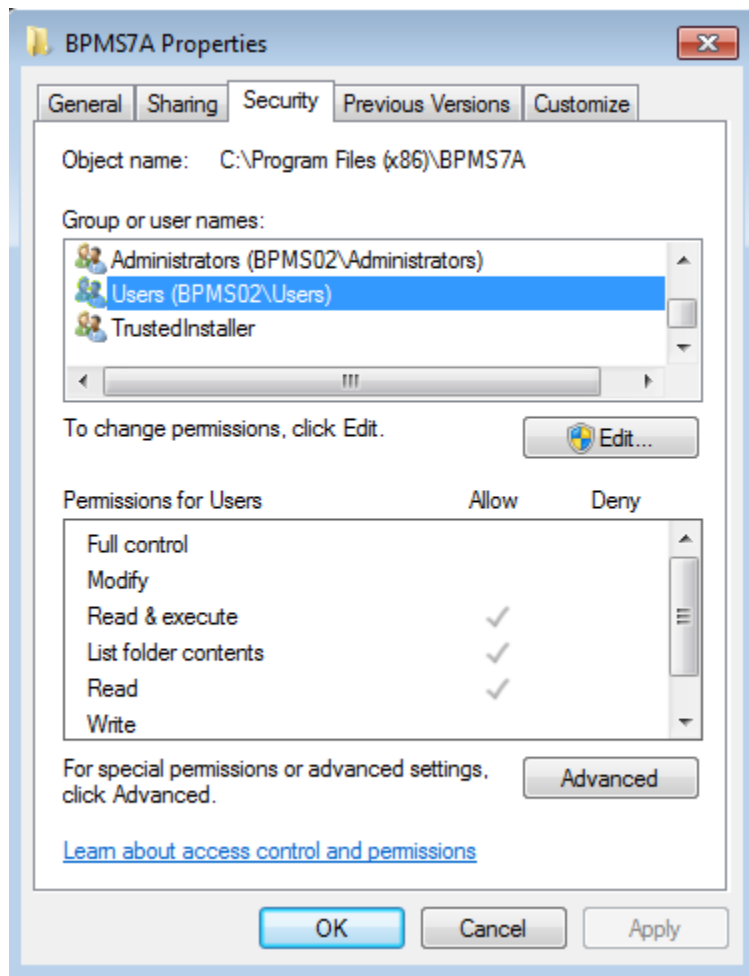
1. Open the COMPUTER application
2. Locate the folder where BPMS is installed. The default folder is either:

**C:\Program Files\BPMS7A\ (32 bit)**

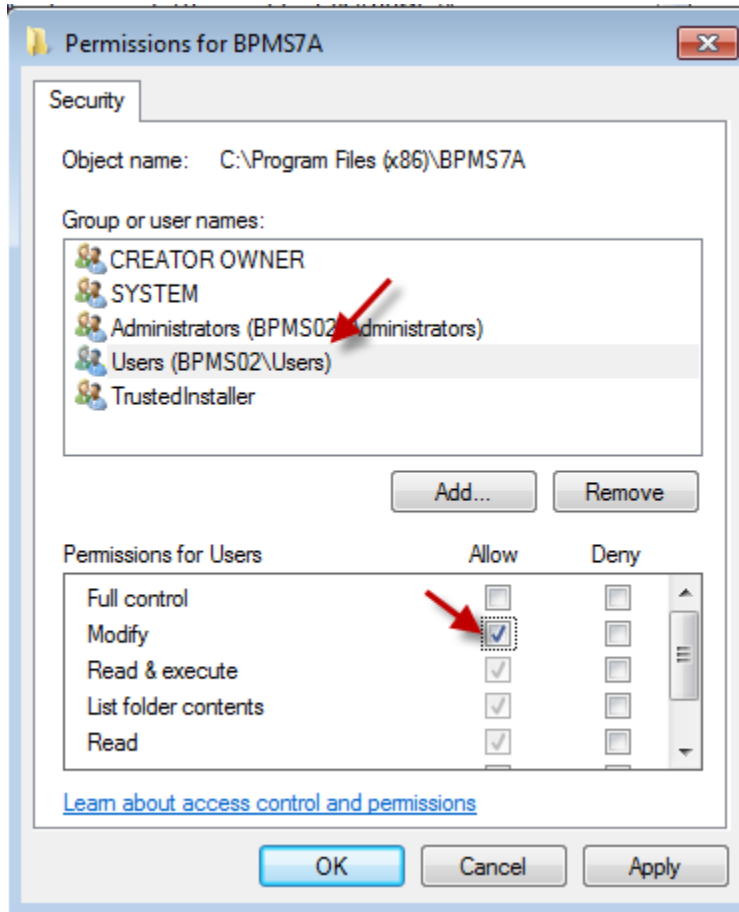
**C:\Program Files (x86)\BPMS7A\ (64 bit)**



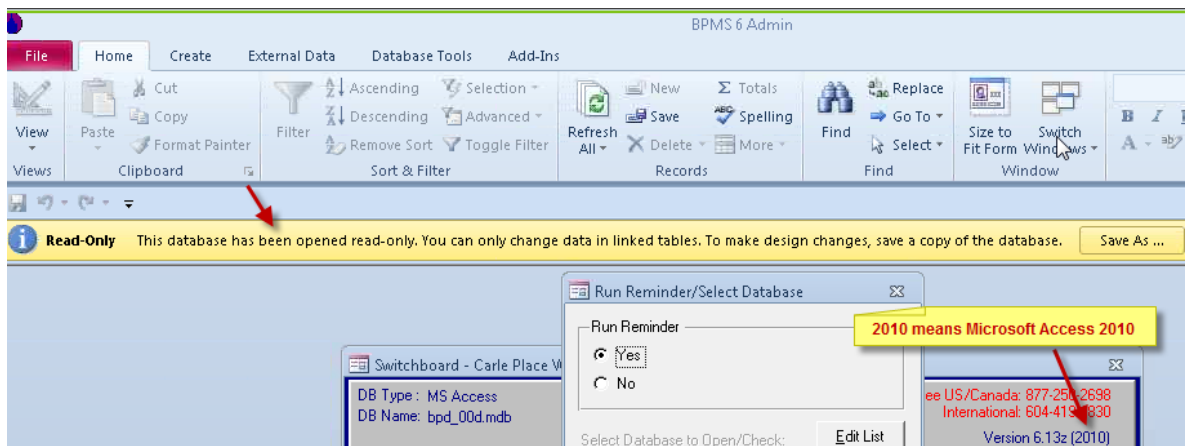
3. Right-click the BPMS7A folder then choose **Properties**



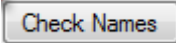


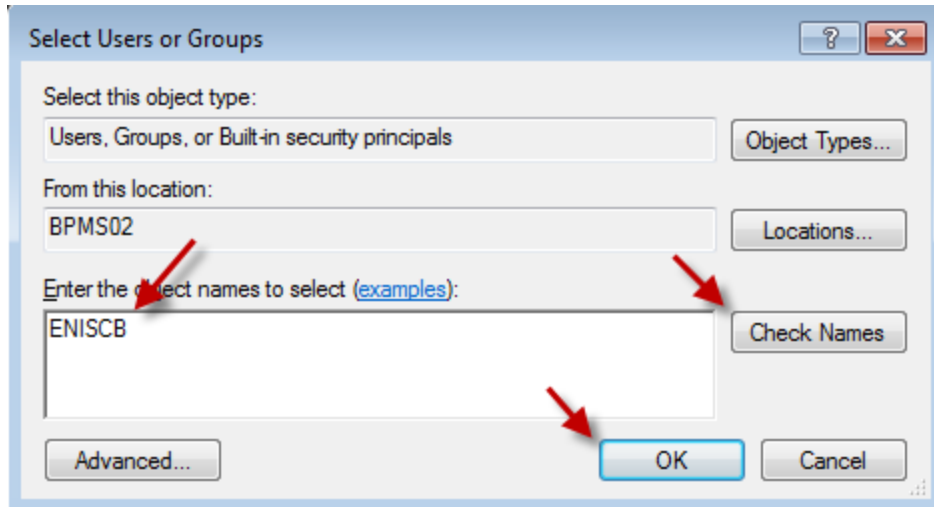
4. Scroll down the list of "Group or user names" then click on the group that starts with **"Users ("**.
5. Click on the **Edit** button
6. Click again on the group that starts with **"Users ("**.
7. Click on the Modify check box as shown below then click OK.



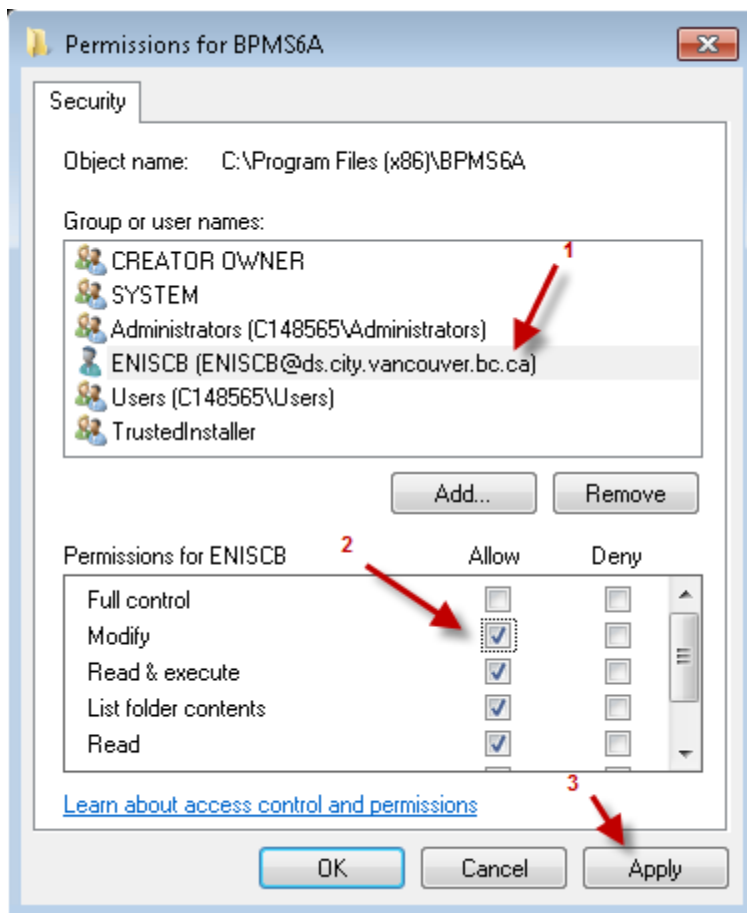
8. If Microsoft Access 2007 or older is installed, you can click OK to close the Properties dialog box. No need to follow the rest of the steps.
9. If **Microsoft Access 2010 or newer** is installed, you also need to grant access to individual Windows user (or Active Directory group) modify permission to the folder above otherwise the application will open as Read-Only as shown on the screen shot below.



10. From the Properties dialog box, click  then click .
11. Enter the Windows User Name (or active directory group name then click  then click OK.



12. Select the object you added in the previous step then check the **Modify** box under **Allow** then click **Apply** then click **OK**.

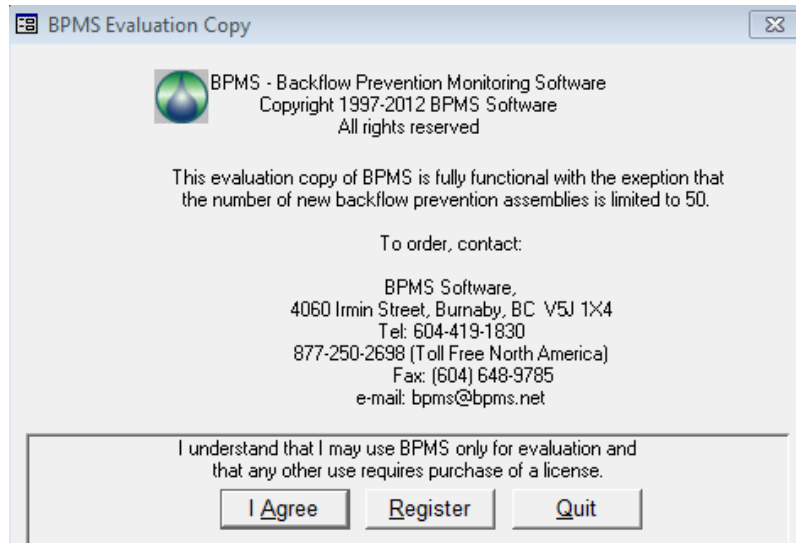


13. Repeat step 10 to 12 for each additional user that may use this machine.
14. When you are done, click OK to close the folder Properties window.
15. If the data folder is located on your local computer, repeat the procedure above for the data folder. The default folder is: **C:\BPMS7AD\**. If your data folder is located on a network, make sure all BPMS users have modify permissions to the folder.



## Step 6 – Run the "BPMS 7 Admin (Test)" Application

The first time you run the application, the following dialog box may appear.



Click **Register** then enter your product key. The Product Key can be found on the BPMS CD-ROM jewel case. If you don't have it, email [bpms@bpms.net](mailto:bpms@bpms.net)

In BPMS applications, the only visible differences will be:

- The Switchboard title will also end with "(Test)".

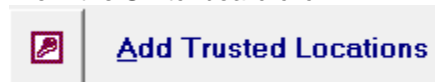


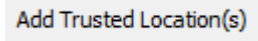
## Step 7 - Add a Trusted Location for BPMS Client Folder (MS Access 2007 or newer)

If Microsoft Access 2007 or newer is installed (see screen shot above for version number), the user may receive a security warning every time the BPMS 7 Admin application is run. You can suppress usually this prompt by following these steps:

1. Run the **BPMS 7 Admin** application.

2. From the Switchboard click  then click

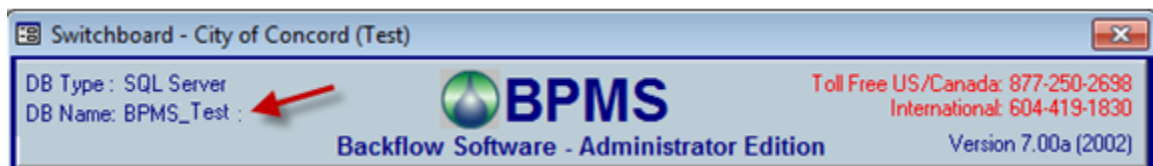


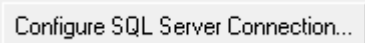
3. Click 
4. You should receive a message that trusted locations were added successfully.
5. The next time the user runs the application, the security warning should no longer appear.

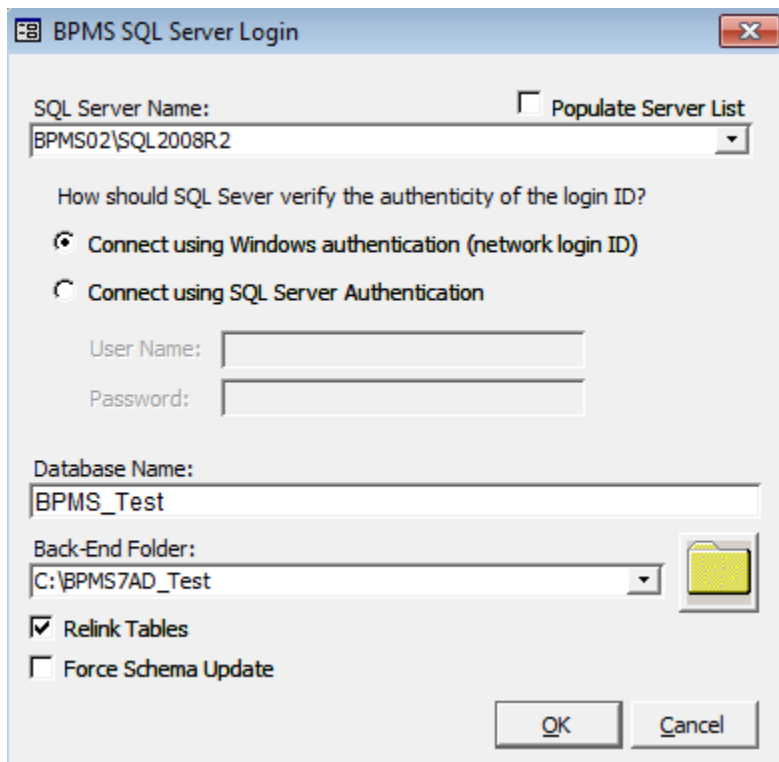
## Step 8 – Change Back-End Database (if applicable)

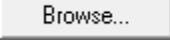
Finally, ensure that the back-end folder and database are from the test environment (not production).

To change the back-end folder and/or database, follow these steps:



- 1) From the BPMS Administrator Switchboard from click **Customize** button then click the **File Locations** tab.
- 2) For SQL Server back-end, click the  button then update the SQL Server Name, Database Name and Back-End Folder.



- 3) For Microsoft Access back-end, click the  button next to "Back-End (Data)" text box then locate the Test folder and database.

## **Appendix A - Troubleshooting**

If you run into problems, contact BPMS support or refer to the document "[Troubleshooting BPMS Errors](#)".

For more information about BPMS 7 Administrator updates and documentation, go to <http://www.bpms.net/update7a.htm>